TRADOC Accreditation

Smart Book

(FY 03)

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TRADOC Accreditation Smart Book

(for Initial Military Training, Reclassification Training, and Institutional Leader Development)

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Introduction

The TRADOC Accreditation Smart Book is designed to be a field guide with all pertinent accreditation information consolidated in one location. The Smart Book is provided for use by education and training institutions (to include proponent schools, Army Training Centers, Non-Commissioned Officer Academies, and Reserve Component TASS Training Battalions) in conducting and reporting the results of self-assessments to accrediting agencies. It can be used also by accrediting agencies (Army Accessions Command, Combined Arms Command, Sergeants Major Academy, and proponent schools) in conducting and reporting the results of accreditation visits. The focus of the TRADOC accreditation initiative, to include both self-assessments and evaluations by accrediting agencies, will be on conduct of training, training support, and proponent functions.

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Accreditation Guidance

1. Self-assessment. Prior to an accreditation evaluation visit, the education/training institution will complete a self-assessment using the Guide. The institution will report the results of the self-assessment to the accrediting authority no later than 30 days prior to the visit. During the visit, accreditation evaluators will use the report to focus their efforts.

2. On-the-spot corrections. Faculty and staffs of training institutions may make on-the-spot corrections during the course of both the self-assessment and the actual accreditation evaluation. Satisfactory on-the-spot corrective actions will merit a MET rating for the item corrected. To ensure that the problems do not recur, evaluators and team chief will make mandatory written comments concerning all deficiencies found and further corrective actions required. Mandatory comments provide a record of the corrected shortcoming and, at the next accreditation visit, allow the accreditation team to determine if the shortcoming is a recurring one.

3. Waivers and exceptions to policy are valid only if they are written and signed by the appropriate waiver authority.

a. Each incidence of non-compliance requires a waiver.

b. Request for a waiver will be submitted prior to violating the requirement of the reference. Short suspense waiver requests can be submitted telephonically and followed by a facsimile (fax) transmission of a waiver, if granted.

c. Education/training institutions must receive the approved waiver (hard copy) prior to conduct of associated training.

4. Standards for determining an accreditation rating, based on the results of the evaluation, are as follows:

a. The team chief recommends accreditation ratings based on---

(1) Findings and recommendations of evaluators.

(2) The severity of the deficiencies and the effects they have on the ability of the institution to train students to required standards.

b. The rating system establishes Bars of Excellence to be achieved by the accredited institution. To reach the first Bar of Excellence, Candidate for Accreditation, the institution must meet the first 5 standards on the ASL. To reach the second Bar of Excellence, Provisional Accreditation, the institution must meet the first 11 standards. To achieve the third Bar of Excellence, Full Accreditation, the institution must be meet the first 11 standards and 24 of the remaining 35 standards. Any institution that meets the first 11 standards and 30 or more of the remaining 35 standards, may, at the discretion of the team chief, be designated as a Learning Institution of Excellence.

5. Institution and accrediting authority actions based on the level of accreditation:

a. Candidate for Accreditation. HQ, TRADOC will notify the institution by memorandum of its Candidacy for Accreditation and will require a re-visit.

(1) The appropriate accrediting authority will schedule a follow-up evaluation within six months. The accrediting authority will notify the institution via certified mail and will contact the institution by telephone to make preparations for a follow-up visit.

(2) The institution will provide to the accrediting authority, 15 days prior to the follow-up visit, a memorandum reporting—

- Corrective action taken by the institution to correct the deficiencies noted as “Not Met” on the ASLs.

- Corrective action taken by the institution to ensure that deficiencies that were observed, but were corrected on-the-spot, do not recur.

(3) The accrediting authority will conduct a follow-up visit to inspect those courses or areas in the institution that did not meet accreditation standards. It may not be necessary to re-inspect those courses or areas of the institution that met accreditation standards during the initial accreditation visit.

(4) HQ, TRADOC, will issue a certificate upgrading the accreditation rating to the appropriate level based on the deficiencies that have been corrected.

b. Provisional Accreditation:

(1) HQ, TRADOC, will notify the institution by memorandum of its provisional rating and will require a written report of corrective action be submitted by a specific date.

(2) Upon receipt of the provisional accreditation memorandum, the institution will respond to the appropriate accrediting authority, in the time specified, with the following information:

- Corrective action taken by the institution to correct the deficiencies noted as “Not Met” on the ASLs.

- Corrective action taken by the institution to ensure that deficiencies that were observed, but were corrected on-the-spot, do not recur.

c. Full Accreditation:

(1) HQ, TRADOC will issue a certificate of accreditation for those institutions achieving the Full Accreditation Bar of Excellence.

(2) Institutions may achieve full accreditation status and still have not met some of the standards. Also, they may have deficiencies the accreditation team observed, but that were listed as "Met" on the ASL because the institution fixed the problem during the evaluation visit. It is the institution's responsibility to address these issues and ensure the corrected deficiencies do not recur in subsequent evaluations. If the same deficiencies are found during the next evaluation visit, they will be considered recurrent deficiencies and the evaluators will note them as such on the ASL.

d. Less than full accreditation based on higher headquarters issues (HHI):

(1) The team chief will determine if the cause for the rating is based on HHI. The accrediting authority may recommend a rating of less than full accreditation of an institution or course when the institution is unable to meet training standards because of HHI.

(2) The institution must exhaust all efforts to rectify problems with higher headquarters, and the efforts must be well documented.

(3) The accrediting authority will make an accreditation determination based on a study of the documented efforts of the institution to correct its problems with higher headquarters.

(4) The following will take place if the accrediting authority determines that an institution should receive a rating of less than full accreditation because of HHI:

- The accrediting authority will recommend either candidacy or provisional accreditation to HQ, TRADOC, with a copy furnished to the higher headquarters involved.

- The accrediting authority will coordinate with all parties involved at the institution and higher headquarters to resolve the issue affecting the accreditation.

- After the issues are resolved between the institution, its higher headquarters, and the accrediting authority, the institution and accrediting authority will follow the actions outline in paragraph 7, above.

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Tab B

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ACCREDITATION STANDARDS LIST (for IMT and Institutional Leader Development)			
Administrative data			
Organization being accredited		**Name:**	
		Location/address:	
Accrediting agency		**Name:**	
Accreditor:	**Name:**	**Phone: DSN:**	
	e-mail address:	**Comm: (___)-___-____, ext**	
	Address:		
Recommen-dation:	**Candidate** ☐ **Provisional** ☐ **Fully Accredited** ☐ **Other** _____		
	Remarks:		

(Attached additional comments should be keyed to item numbers.)

Bar of Excellence – Candidate for Accreditation					
ITEM NO.	**Standard**	**Met**	**Not Met**	**N/A N/O**	**Ppnt Rqmt**
1	Students can perform to the standards prescribed in the lessons.				
2	Instructors train students to the prescribed standards.				
3	Instructors meet qualifications and have evidence of proponent technical certification requirements				
4	Institution conducts training in compliance with safety hazard and environmental considerations identified in lesson plans, as well as installation training areas.				
5	Institution conducts training which is effective and efficient				only
Bar of Excellence – Provisional Accreditation (Must meet all of the above plus the following)					
ITEM NO.	**Standard**	**Met**	**Not Met**	**N/A N/O**	**Ppnt Rqmt**
6	Institution complies with established instructor-to- student and equipment ratios when presenting lessons.				
7	Tasks are current and approved.				only
8	Instructors Conduct training in accordance with the mandatory training sequence.				
9	Tests are valid and reliable.				only
10	Institution follows test control procedures IAW TRADOC Testing Memorandum.				
11	Institution requisitioned training resources. i.e., equipment, TADSS, ammunition, pyrotechnics, training materials, consumable supplies and references of the types and quantities to meet requirements.				
Bar of Excellence – Full Accreditation (Must meet all of the above plus 24 of the following standards) [Institutions that meet more than 30 of the following standards will be designated Institutions (Centers, Schools, Battalions) of Excellence]					
ITEM NO.	**Standard**	**Met**	**Not Met**	**N/A N/O**	**Ppnt Rqmt**
12	Staff and faculty training meets the needs of the institution.				
13	Curriculum is COE compliant				only
14	Institution evaluates and tracks instructor/cadre performance.				
15	Institution provides students the opportunity to demonstrate their leadership, skills, and knowledge in a performance-oriented environment.				
16	Instructors have and use the required course materials.				
17	Instructors use training resources, to include ammunition, pyrotechnics, training equipment, TADSS, training materials, consumables, and references as prescribed.				
18	Institution uses ranges and training areas as prescribed.				
19	Instructors perform student academic counseling.				

20	Instructors/cadre serve as mentors, counselors, and role models.				
21	The school/ institution is adequately staffed IAW approved TDA.				
22	Classrooms/shop areas/ learning facilities are adequate to promote learning and meet learning objectives.				
23	Education/Training organization has a viable transportation program				
24	Billets are adequate, clean, and maintained IAW references.				
25	Institution administers criterion-referenced performance or performance-based tests in accordance with guidance.				
26	Institution complies with ATRRS data entry requirements.				
27	Institution distributes materials required for course preparation to incoming students in a timely manner.				
28	Institution conducts courses within minimum and maximum class size limitations				
29	Institution conducts on-site risk assessments and takes action as appropriate.				
30	Institution conducts after action reviews (AAR)/sensing sessions as required by the course material.				
31	Institution provides remedial training.				
32	Institution conducts physical fitness training.				
33	Enrolled students meet course prerequisites.				
34	Institution processes students released from courses IAW references.				
35	Institution has a policy for retraining students.				
36	Institution maintains student attendance records.				
37	Student records contain required documentation.				
38	Institution processes students who fail to maintain body composition standards IAW references.				
39	Institution prepares and distributes evaluation reports as appropriate.				
40	School/institution has written policies for Equal Employment Opportunity and Sexual Harassment				
41	Education/training organization provides for the health, welfare, and quality of life of soldiers				
42	Institution has quality assurance and quality control functions in place to identify education/training program deficiencies and coordinate corrections.				only
43	Institution conducts internal and external evaluations.				only
44	Instructors do not use copyright and intellectual materials in education/ training unless appropriate written releases have been obtained and are on file.				only
45	Institution has corrected previously identified accreditation, evaluation, and QAO shortcomings.				
46	Students demonstrate working knowledge of COE and OPFOR doctrine				
47	Institution ensures all soldiers/officers meet mandatory graduation requirements (IMT only).				

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Accreditation Standards Guide
(FY 03)

(New Format as of October 2002)

This Accreditation Standards Guide (ASG) lists each standard, with references, criteria, guidelines, mandatory comments, and documentation to be made available to the accreditation team when it arrives to begin the evaluation.

Standard 1 Students can perform to the standard prescribed in the lessons.

a. References

TRADOC Regulation (TR) 350-6, Chs 1,2,4,5 & Apx B & C; TR 350-70, Chs II-1-7, VI-6, VI-7 & VI-8; FM 25-100, Ch 1; TR 350-10, para 2-7 & 2-8; TR 350-18, para 3-28 & 4-5; CMP; POI; Lesson Plans

b. Criteria

> Students demonstrate that they can perform the objectives to prescribed standard.
> TD proponent only:
- Performance tests and practical exercises are included in or provided to support lessons.
- Learning objectives match/support the tasks to be taught in the lesson.
- Tests measure lesson objective performance.
- Training is based on valid TD processes IAW required references.

c. Guidelines

> Check instructor supervision of student performance during practical exercises, performance tests, and checks on learning.
> Review student evaluation plans.
> TD proponent only:
- Compare lesson LOs to tasks to be taught by the lesson to determine if the specified lesson actually teaches task performance.
- Compare tests to lesson LOs to determine if the specified test actually measures student performance of the established LOs to the prescribed standards.
- Compare lesson LOs to the lesson materials to determine if the material teaches the LOs.

d. Mandatory Comments

> Document cases where organization uses tests that were not created by the TD proponent.
> Document instances where appropriate feedback was not provided to students.
> TD proponent only: Document all instances where the test taken by the students does not measure performance of the learning objective.

e. Required Documentation

> Course Management Plans for courses in session.
> Student Evaluation Plans for courses in session.
> Copies of selected lessons pertaining to the practical exercises and tests.
> End-of-course critiques.
> Results of tests administered for courses in session.

Standard 2 Instructors train students to the prescribed standards.

a. References

AR 351-1, para 1-5; TR 350-6, Chs 2 & 3; TR 350-70, Chs VI-6 & VI-8, Apx E; TR 350-10, para 2-7g; TR 350-18, paras 4-5 & 4-6; CMP; POI; Lesson Plan; TSP

b. Criteria

> Instructor verifies that students can perform the learning objectives (LOs) to prescribed standards by checking practical exercise and performance test results and observing student performance.
> Instructor complies with techniques of delivery and methods of instruction prescribed in TSP/lesson Plan/lesson.
> TD proponent only:
- LOs reflect the performance required of the tasks being trained.
- LOs identify standards that measures performance of the LO action statement.
- The proponent provided a CMP to the using organization.

c. Guidelines

> Observe, when possible, one ongoing lesson, to include a test or PE, for each course currently in session to ensure the organization is conforming to the instructional requirements.
> Review student evaluation plans.
> TD proponent only:
- Compare lesson LOs to tasks to be taught by the lesson to determine if the specified lesson actually teaches task performance.
- Instructors may share operational assignment experience to facilitate learning, but must teach everything that is included in the approved lesson.
- Ensure organization has a waiver from the proponent for changes to lesson plans.

d. Mandatory Comments

> Document all cases of failure of the instructors to teach what is required of the lesson plan.
> If the lesson plan requires an exercise, e.g., FTX, STX, and the school does not conduct the exercise, mark as a NOT MET.
> Mark NOT MET if the instructor does not require students to demonstrate that they can perform the LOs to the prescribed standards.

e. Required Documentation

> Selected lessons, Course Management Plan, for courses in session.
> Access to end of course critiques as needed.

Standard 3 **Instructors meet qualifications and have evidence of proponent technical certification requirements.**

a. References

AR 614-200, paras 6-7, 6-9, & 6-12; DA Pam 611-21, para 11-2; TR 350-6, para 3-6 & Apx F; TR 350-70, Ch II-1; TR 350-18, paras 3-8 & 4-6; TR 350-10, para 2-14b; Course qualification and certification requirements in appropriate CMP.

b. Criteria

> **Instructors meet the common requirements for all instructors (e.g., graduate of Instructor Training Course).**

> **Instructors meet the course qualification and certification requirements listed in the appropriate CMP, references, and proponent policy.**

> **Instructors have documentation of technical certification where appropriate.**

c. Guidelines

> Evaluate the records of instructors for all classes in session.

- **Instructor "qualification" refers to requirements for instructors to teach a particular course.**
- **Instructor "certification" refers to criteria specified by the proponent for instructors in that discipline.**

> **Every record checked must have the appropriate documentation.**

> **Review courses for previous 12 months to determine if SGL and instructor grade requirements are being followed per TRADOC Reg 351-10, para 2-14b.**

> Check for operator's permit, where applicable.

d. Mandatory Comments

> **Document any and all deficiencies in this area.**

> **Identify all issues that are the responsibility of higher headquarters or organizations outside of the institution's ability to control. These will be noted as Higher Headquarters Issues (HHI).**

e. Required Documentation

> **Instructor's proponent certification.**

> **Documentation that instructors (to include contractor personnel) meet instructor certification requirements for the course being taught.**

> **Instructor training certificate(s) (or DA Form(s)1059) (e.g., ITC, SGI, IPC, as appropriate.**

> **Copy of instructor evaluations from the previous 12 months.**

Standard 4 **Institution conducts training in compliance with safety hazard and environmental considerations identified in lesson plans as well as installation training areas.**

a. References

AR 5-355 (Defense Traffic Management); AR 200-1 (Environmental Protection and Enhancement); AR 200-2 (Environmental Effects of Army Actions); AR 200-3 (Natural Resources - Land, Forest, and Wildlife Management); AR 385-10 (The Army Safety Program); FM 101-5 (Staff Operations and Organizations); FM 100-14; TR 385-2, para 4-4 (TRADOC Safety Program); TR 350-70, Chs I-2 & VI-6; TR 350-6, Ch 3; TR 350-10, para 2-17; Applicable range control SOP; Installation training area usage policy and procedures; and lesson plan.

b. Criteria

> Safety hazard and environmental considerations are complied with when conducting training.
> Safety and environmental deficiencies identified during the current and previous training year have been adequately addressed. [Rationale: This is critical to ensure safety of personnel and equipment as well as compliance with laws and regulations.]
> TD Proponent only: Safety hazards, and environmental considerations are addressed in the lesson material.

c. Guidelines

> Verify Instructor provides safety information(briefing) at the start of the lesson.
> Check lesson plans for safety requirements and environment protection considerations.
> Observe at least one lesson that includes a PE for each course
> Check for safety and environmental protection considerations in all lessons observed.
> Check training accident reports.
> Talk to the education/training organization/ installation safety and environmental office, students, instructors, medical facility personnel, if required.

d. Mandatory Comments

> Document any and all deficiencies in this area.
> Identify all issues that are the responsibility of higher headquarters or organization outside of the proponent's ability to control.

e. Required Documentation

> Roster of reportable training accidents that occurred during the preceding 12 months involving students, instructors, training support personnel, equipment, and facilities.
> Access to accident investigation documentation
> Documentation verifying the accident was reported.
> Documentation requesting assistance for safety/environmental protection issues that are beyond the capability of the organization to resolve.

Standard 5 Institution conducts training which is effective and efficient.

a. References
TR 350-70, Apx H; TRADOC Pam, 350-70-2, Ch 4; CMP; POI; TSP

b. Criteria
> TD Proponent only:
- Method of instruction selected is most effective way of presenting the material.
- Technique of delivery selected is most effective way of presenting the material.
- Course is structured based on learning hierarchy derived from tasks and supporting skills and knowledge.
- Audio-visual materials and special effects contribute to learning.

> ILD only:
- Training/education produces/develops the direct and organizational leadership skills and actions leaders must master and develop
- Training/education uses live, virtual, and constructive training domains, training areas, ranges, and TADSS to simulate full spectrum operations in the contemporary operational environment.

c. Guidelines
> Compare MOIs and techniques of delivery to guidance in appendix H, TRADOC Reg 350-70.
> Verify that audio-visuals and special effects used in training comply with guidance provided in Chapter 4, TRADOC Pam 350-70-2

d. Mandatory Comments
> Document instances in which better use of MOI, technique of delivery, and/or audio-visuals would improve the presentation.

e. Required Documentation
> Course management plans for courses in session.

Standard 6 **Institution complies with established instructor-to-student and equipment ratios, as stated in lesson plans, when conducting training.**

a. References
TR 350-70, Ch VI-8; TR 350-10, paras 2-13c & 5-11; POI; Lesson Plans; CMP; TSP

b. Criteria
> Instructor-to-student ratio is prescribed in the lesson plans.
> Lesson attendance does not exceed lesson/POI prescribed instructor-to-student or student-to-equipment ratios.
> Education/training organization has a waiver from the proponent to use other than lesson/POI-prescribed instructor-to-student or student-to-equipment ratios.

c. Guidelines
> Observe presentation of at least one lesson for each course in session to determine compliance with presentation ratios.
> Check waiver as required.

d. Mandatory Comments
> Document repeated incidents of violating prescribed ratios and reasons.
> Document HHIs.

e. Required Documentation
> Lesson plans/POIs for courses in session.

Standard 7 Tasks are current and approved.

a. References
TR 350-70, Chs VI-1 & VI-2; TR 350-10, para 1-4; POI; CTLs; TSPs

b. Criteria
> TD Proponent only:
- Has current approved critical task list.
- Has current approved critical task analysis data.
- Courses are designed using the approved task data.
- ILE Only: Course design provides for meeting competencies.

c. Guidelines
> Review task approval memorandum.
> Compare tasks listed in POI to approved task list.

d. Mandatory Comments
> Courses not designed using current tasks.
> Critical task list not approved by commandant.

e. Required Documentation
> POI for selected courses.
> Task approval memos.
> Access to task data.

Standard 8 **Instructors conduct training in accordance with the mandatory training sequence.**

a. References

TR 350-6, Chs 2 & 3; TR 350-70, Ch VI-6; FM 25-101, Ch 3; CMP; Mandatory Training Sequence; POI; Lesson Plan

b. Criteria

> Training schedules reflect all required lessons, prescribed hours of instruction, and Mandatory Training Sequence, as stated in the CMP.
> Schedule includes sufficient set-up and tear-down time.
> Schedule includes time for movement.

c. Guidelines

> Check training schedule for each course in session.
> Compare mandatory training sequence to training schedule to verify completeness and compliance.
> Check to ensure classes are conducted IAW the training schedule.

d. Mandatory Comments

> Document instances found where school's training schedules do not reflect the Mandatory Training Sequence.

e. Required Documentation

> Course Management Plan, to include a copy of the course map showing the mandatory training sequence, for all courses in session.
> Training schedule for all courses in session.

Standard 9 Tests are valid and reliable.

a. References
TR 350-6, para 3-31; TR 350-70, Ch VI-7

b. Criteria
> TD proponent only:
- Tests provided are valid.
- **Test analysis was conducted and validity and reliability results were/are being applied to the tests.**
- Test items are derived from, and measure, learning objective performance.

c. Guidelines
> Review test/test item analysis data.
> Determine if the tests have been validated.
> Determine if Test/test item analysis results are provided to the individuals responsible for constructing/revising the test(s).

d. Mandatory Comments
> Document any finding of using invalid tests.
> Document every instance where a student was failed/dropped from education/training by using a test that was not validated or was known to be invalid.

e. Required Documentation
> Test/test item analysis results for selected tests.
> Corrective actions taken.

Standard 10 Organization follows test control procedures IAW TRADOC Testing Memorandum.

a. References
AR 611-5; TR 350-70, Ch VI-7 & Apx E; TR 350-10, Ch 2; POI; CMP; DSSC CMP, Ch 1; Testing Memorandum; Training Institution SOP

b. Criteria
> All tests were administered IAW Regulatory requirements and proponent provided procedures.
> TD proponent only: Test administration procedures are included in the CMP, lesson plans, and/or with tests.

c. Guidelines
> Check this item at education/training sites where tests are handled, stored, administered, or scored.

d. Mandatory Comments
> Evidence of failing to control test material when required will be cause for a NO GO.
> Record all cases when tests are not controlled IAW regulatory requirements and course documentation.

e. Required Documentation
> Copy of organization test control standing operating procedures (SOP).

Standard 11 Institution requisitioned training resources (i.e., equipment (TADSS), ammunition, pyrotechnics, training material, consumable supplies, and references) of the types and quantities to meet requirements.

a. References

DA Pam 350-38 (STRAC); TR 350-18, Ch 3; TR 350-70, Ch VI-6; POI; TSP; Lesson Plan

b. Criteria

> Required equipment listed in POI/TSP for courses in session was requested from appropriate agencies/headquarters in a timely fashion IAW applicable local procedures.
> Required ammunition/pyrotechnics listed in POI/TSP for classes in session were requested from appropriate agencies/headquarters IAW applicable local procedures.
> The education/training organization has forecast and ordered all course-required training support materials and references for courses in session.
> The education/training organization maintains an account with DA Administrative Publications System.

c. Guidelines

> Review equipment/TADSS requisition documents.
> Interview staff and students.
> The evaluator will detail the training impact of non-availability (to include dates, times, missing equipment, course, and class).
> If the education/training organization followed all the correct procedures, and failure to obtain equipment rests with an agency not within the control of the education/training organization commandant or education/training organization battalion commander, the evaluator will include an appropriate comment in the executive summary. Note as a Higher Headquarters Issue.
> Review ammunition/pyrotechnic requisition documents.
> If students cannot train or be tested to lesson conditions and standards because of lack of training support materials or references, evaluator will check for waivers.

d. Mandatory Comments

> The evaluator will indicate what equipment/TADSS is missing/inoperable, in what course, class, classroom, and on what date.
> The evaluator will attach a copy of the request/tasking and will reference the SOP/policy directive regulation which prescribes procedures for requesting the required equipment.
> Document if education/training cannot be conducted because of non-availability of consumable materials, e.g., spare parts for maintenance training.
> If the education/training organization has followed prescribed procedures for identifying required amounts of ammunition/pyrotechnic, but is not receiving the amount required to implement the course, evaluator will write details of the training impact (to include dates, times, course, and class). Note as a Higher Headquarters Issue.
> If the education/training organization followed all the correct procedures, and failure to obtain course materials rests with an agency not within the control of the education/training organization commandant or education/training organization battalion commander, the evaluator will include an appropriate comment in the executive summary. (Note as a Higher Headquarters Issue)
> Consider lag time for obtaining new equipment.

e. Required Documentation

> POI annex/TSP/lesson plans for courses in session.
> Access to requisition documents.
> Access to local SOP.
> Access to prescribed procedures for identifying requirements.

Standard 12 Staff and faculty training and professional development meet the needs of the institution.

a. References
TR 350-6, paras 1-6, 2-14, 3-6 & Apx F; TR 350-70, Chs II-1 & III-2; Institution's SOP

b. Criteria
> Institution provides evidence on needs assessment.
> Institution provides training to its staff and faculty IAW references.
> Institution provides training on the use of training/training development automated systems as required.
> Certification program includes instruction on COE and OPFOR doctrine.
> Required self-development training is available for improving staff and faculty skills and increasing faculty subject matter mastery.

c. Guidelines
> Review training for following populations:
- Instructors/cadre
- Training Developers
- Evaluators
- Training Development Managers
- Training Managers
- Installation personnel, as required
> **Compare numbers trained annually against target populations to determine whether or not training keeps pace with projected turnover.**

d. Mandatory Comments
> Document any and all deficiencies in this area.
> Identify all issues that are the responsibility of higher headquarters or organizations outside of the institution's ability to control.

e. Required Documentation
> Size of population and numbers trained annually for following target populations:
- Instructors/cadre
- Training Developers
- Evaluators
- Training Development Managers
- Training Managers
- Installation personnel, as required

Standard 13 Curriculum is COE compliant.

a. References
FM 7-100 (draft); FM 7-100-1 (draft); FM 7-100-2 (draft); FM 7-100-3 (draft); FM 3-0, OPFOR; COE White Paper, May 2001

b. Criteria
> TD Proponent Only:
- COE variables are integrated into training exercises and classroom work.
- OPFOR used in all training scenarios and for other classroom work is compliant with order of battle and doctrine in reference FMs.
- COE variables; complex terrain, social and cultural factors, regional and international relationships, PVOs/NGOs, information, time and economics, are used to illustrate the complex battlefield. These variables are explained at the level appropriate for the training audience.

c. Guidelines
> Review POI and lesson plans for inclusion of COE variables.

d. Mandatory Comments
> Record instances in which COE variables are not integrated into training.

e. Required Documentation
> POI and lesson plans for courses in session.

Standard 14 Institution evaluates and tracks instructor/cadre performance.

a. References

FM 22-100, Apx C, Developmental Counseling; TR 350-6, Chs 1 & 3; TR 350-18, para 2-19; TR 350-16, Ch 3; TR 350-70 Chs II-1 & III-4; TR 350-10, para 2-14

b. Criteria

> The organization has a viable instructor/cadre evaluation program in place that contributes to improving instructor performance.
> Instructor/cadre evaluations are on file and available to evaluators, instructors, and education/training organization management.
> Institution conducts developmental counseling that produces plan of action instructors must follow to achieve.

c. Guidelines

> Evaluate instructor records from each type of course being evaluated (e.g., IET, Leader development).
> Standards and requirements for instructor evaluation program will be IAW regulations and CMP.
> Interview instructors/cadre and evaluators.

d. Mandatory Comments

> Identify substandard instructor/cadre performance that was not corrected.
> Report when instructor/cadre performance is not evaluated/tracked.

e. Required Documentation

> Access to instructor/cadre files.

Standard 15 Institution provides students the opportunity to demonstrate their leadership, skills, and knowledge in a performance-oriented environment.

a. References
FM 22-100, Apx B; TR 350-6, Chs 1 & 3; TR 351-10, Ch 2; CMP; Lesson Plan; SEP

b. Criteria
> Education/training organization places students in challenging, performance-oriented environment throughout the day as prescribed by the lesson material.

c. Guidelines
> Review lesson materials and identify practical exercises and performance tests that provide for this opportunity.

d. Mandatory Comments
> Note for training development proponent action if the lesson material does not provide for this opportunity.

e. Required Documentation
> List of lessons with PEs/tests from the courses that are in session that provide for meeting this standard.
> Selected lesson plans from the provided list.

Standard 16 Instructors have and use the required course materials.

a. References
TR 350-6, paras 3-2 & 3-6; TR 350-10, para 2-7; TR 350-18, para 4-5; TR 350-70, Chs VI-6, VI-7, & VI-8; CMP; POI; TSP

b. Criteria
> A current course POI is available and it matches the lessons.
> Current proponent Course Management Plan (CMP) (exportable courses only) is available and is being followed for presenting the course.
> Current, validated, proponent course lesson plans are available and are being used to teach the course.
> Instructor has immediate access to a current copy of all written student materials for the lesson being taught.
> Current class roster is available.
> TD proponent only: Validated all education/training products IAW regulation.

c. Guidelines
> Compare CMP, lesson plans, POI, tests, Student Evaluation Plan, and other course material.

d. Mandatory Comments
> Document instances where lesson plans do not match POI.
> Document instances of noncompliance with the CMP.
> Document instances where obsolete education/training materials are being used.

e. Required Documentation
> Course documentation, to include lesson plans, POI, CMP, SEP, etc. for courses in session.
> TD proponent only: Validation results.

Standard 17 **Instructors use training resources, to include ammunition, pyrotechnics, training equipment, TADSS (Training Aids, Devices, Simulations, and Simulators), training materials, consumables (e.g., spare parts, lubricants, student handouts), and references, as prescribed.**

a. References

AR 5-13, paras 5-6 & 5-7; TR 350-6, paras 3-6 & 3-12; TR 350-8, paras 2-1 thru 2-4; TR 350-18, Chs 2 & 3; TR 350-70, Ch VI-6; ARPRINT Course Requirements; STRAC tables; TRADOC Memo (TADSS); TSP; Lesson Plan

b. Criteria

> TD Proponent Only: POI/TSP/Lesson Plan specifies the training resources required to conduct training.
> Equipment and TADSS are used in the quantities and types and quantities required by the lesson.
> Required training support materials, consumable supplies, and references are distributed and used to conduct the training IAW course documentation.
> The education/training organization has sufficient multi-media, word processing, and internet capabilities for student use.
> The organization has a waiver from the proponent to use other than POI/TSP-prescribed ammunition, pyrotechnics, and equipment.
> All equipment/TADSS listed in the POI are maintained in a serviceable (operable) condition IAW applicable technical manual and are available and serviceable when needed.
> The organization maintains material (e.g., spare parts, lubricants, student handouts) inventories adequate to provide the required education/training when needed.
> The organization has adequate equipment tasking and scheduling procedures to ensure equipment is on hand to support training.
> The organization maintains accounts with a Region Visual Information/Training Support Center and the DA Administrative Publications System.

c. Guidelines

> Observe at least one lesson for each course in session.
> Check lesson plans for inclusion of instructor/student- to-equipment ratio.
> Interview staff and students to identify training resource problems.
> Check for waivers if students cannot train to lesson conditions and standards because of lack of training resources.
> Compare requirements to requisition submissions.
> Determine if organization identified training resource shortfalls and took appropriate corrective action.
> Repeated instances of course-required support materials not being available when required will constitute a NOT-MET rating

d. Mandatory Comments

> Document what, when, and why training resources are not available for education/training as required.
> Document all instances in which students cannot be trained to standards because of a lack of training resources.
> If the organization followed all the correct procedures, and failure to obtain training resources rests with an agency not within the control of the organization, the evaluator will include an appropriate comment in the executive summary. Note as Higher Headquarters issue.

(Continued)

e. Required Documentation

> Current POI and lesson plans for each course in session that requires ammunition, pyrotechnics, and TADSS.
> Listing of materials, consumables, and references required to present the classes in session.
> Waiver to substitute ammunition/pyrotechnic requirement or to conduct training without specified resources.
> List of instances of non- training or limited training because of shortage or non-availability of ammunition or pyrotechnics.
> Documents showing higher HQ policies or actions that impact on availability of ammunition or pyrotechnics.
> Documentation of effort to resolve systemic supply problems.

Standard 18 Institution uses ranges and training areas as prescribed.

a. References
TR 350-70, Chs VI-6 & VI-8; POI; TSP; Lesson Plan

b. Criteria
> TD Proponent only: POI/TSP/lesson plan specifies the required ranges and training areas.
> Training areas and ranges required by the lesson are actually used as required.
> Training areas and ranges required by the lesson meet the capability requirements.
> Range and training areas were scheduled to ensure their availability when needed.
> Access was provided to facilities required to implement the education/training when and for the period of time required to train to prescribed standard.
> Education/training organization has a waiver to use other than POI/TSP-prescribed training area/range.

c. Guidelines
> Observe at least one lesson requiring use of a range for each course in session, when applicable.
> Mark this item as a NO GO if students cannot train to lesson/TSP conditions and standards because of lack of training areas/ranges.
> Interview students concerning range/training area use.
> Determine if education/training organization identified training areas/range shortfalls and took appropriate corrective action.

d. Mandatory Comments
> Document instances when and why sufficient training areas/ranges are not available to conduct the training.
> Document any instances of the institution not having a waiver.

e. Required Documentation
> Copy of selected POI, TSP, or lesson plans that require the use of ranges or training areas.
> List of occasions when specified ranges or training area was not available for use when needed.
> Copy of waiver requests detailing impact on training.

Standard 19 Instructors perform student academic counseling.

a. References
FM 22-100, Apx C; TR 350-6, para 2-2; TR 350-10, para 2-7; TR 350-18, paras 3-28 & 3-29; CMP; Army Counseling website (http://www.counseling.army.mil)

b. Criteria
> Academic counseling occurs per references.
> Institution maintains student counseling records.
> Counseling records show all counseling sessions, are current, and complete.

c. Guidelines
> Check student records for minimum counseling requirements.
> Review counseling forms for completeness.

d. Mandatory Comments
> Document if organization does not meet the requirements for academic counseling.

e. Required Documentation
> Access to student records.

Standard 20 Instructors/cadre serve as mentors, counselors, and role models.

a. References
AR 670-1, para 1-9; TR 350-6, paras 2-5, 3-1, & 3-14; TR 350-10, para 2-14; DSSC CMP, Chs 1 & 5

b. Criteria
> Instructors/cadre serve as mentors, counselors, and role models.
> Counseling forms are completed for all formal academic counseling sessions.

c. Guidelines
> SGLs/instructors/cadre will be mentors, counselors, and role models during and after the normal academic day.
> Talk to instructors/cadre and students.
> Spot check counseling records selected randomly from different instructors.

d. Mandatory Comments
> Document repeated instances of failure to record formal academic counseling.

e. Required Documentation
> Access to student counseling records.
> Access to end of course critiques.

Standard 21 The school/institution is adequately staffed IAW approved TDA.

a. References
DA Pam 611-21, Ch 11; TR 350-10, para 5-11; TR 350-18, Ch 3; POI

b. Criteria
- **> Commandants and commanders have staffed their schools with sufficient instructor, admin., opns, and supply personnel to accomplish the training msn.**
- **> School TDA meets current mission requirements.**
- **> School is in compliance with its own TDA.**

c. Guidelines
- > Check TDA for authorizations.
- **> Compare the TDA to the Unit Manning Roster.**
- **> Check that ranks of training battalion commanders are IAW the approved TDA.**
- **> DA Pam 611-21 contains enlisted standard grade requirements for the structure of a TDA (e.g., a Command Sergeant Major must command an NCOA Training Battalion or AC NCO Academy).**
- > Review last Monthly Status Report.

d. Mandatory Comments
- **> Document any and all deficiencies in this area.**
- > Identify all issues that are the responsibility of higher headquarters or organizations outside of the institution's ability to control (HHI).

e. Required Documentation
- > Copies of TDA and Unit Manning Roster.
- > Copy of last Monthly Status Report (MSR).

Standard 22 Classrooms/shop areas/ learning facilities are adequate to promote learning and meet learning objectives.

a. References

AR 210-50, para 4-4 & Table 4-2; TR 350-6, Apx K; TR 350-10, para 2-7; TR 350-18, paras 3-5 & 3-20; Installation Status Report (ISR); CMP; POI

b. Criteria

> Classrooms/shop areas/learning facilities (e.g., MOUT site, swimming pool) size, lighting, climate control, and furnishings are adequate.
> Facilities are maintained in a serviceable condition.
> Study facilities are available to students after duty hours.
> The education/training organization has sufficient multi-media, word processing, and internet capabilities required for coursework available for student use after duty hours.
> The education/training organization identified and submitted MCA project requirements and made an appropriate update to their ITPs.

c. Guidelines

> At a minimum, observe size, lighting, climate control, furnishings, and condition.
> Verify status of facilities as described in most recent Installation Status Report (ISR).

d. Mandatory Comments

> Document if areas do not meet ISR amber rating and efforts made by the education/training organization made to improve the condition.
> Document if study facilities are not adequate for efficient learning and document efforts taken by the education/training organization to correct the situation. If problem is beyond the control to the education/ training organization indicate that it is a higher HQ issue.

e. Required Documentation

> Name, number, location of facilities used for education/training.
> Copies of requests for facilities and facility improvements.
> Copy of most recent Installation Status Report.

Standard 23 Education/Training organization has a viable transportation program.

a. References
> Education/training organization SOP; Policy documentation

b. Criteria
> Students can safely reach their places of duty on time with minimum time enroute.
> Students are transported to training sites for classes with minimum use of academic time.

c. Guidelines
> Interview students and instructors to identify problems.

d. Mandatory Comments
> Document instances where the transportation program is insufficient.

e. Required Documentation
> Institution SOP.
> End-of-course critiques.

Standard 24 Billets are adequate, clean, and maintained IAW references.

a. References
AR 210-50, para 4-4, Tables 4-2, & Table 4-3; TR 350-6, para 2-9; TR 350-10, para 2-5; DSSC CMP, Ch 4; TB Med 530; Installation Status Report (ISR); Institution's SOP

b. Criteria
> Billets provide adequate space and the furnishings are to standard IAW references.
> Billets are clean and maintained to Army standards.
> Students are billeted on post whenever practical.
> NCOES Only: Installation commanders (commandants) made every effort to billet students on post in NCOA training Battalions and Active Component NCO Academies to create the desired NCOA live-in environment.
> IMT Only: Billets conform to separate and secure guidelines.

c. Guidelines
> NCOES Only: Determine if priority billet assignments went to PLDC students, then BNCOC students, then ANCOC students.
> Determine if statements of non-availability were issued to student when appropriate.

d. Mandatory Comments
> If billets are not to standard, document the efforts made to bring them up to standard. If problem is beyond the control to the education/ training organization indicate that it is a higher HQ issue.
> Identify any factors in billeting that distract from learning.

e. Required Documentation
> Building numbers, names, and locations of student billets.
> Documentation showing efforts to house NCOA students on post.
> Copies of requests for facilities and facility improvements.
> End-of-course critiques.

Standard 25 Institution administers criterion-referenced performance or performance-based tests in accordance with guidance.

a. References
AR 351-1, para 6-15; TR 350-70, Ch VI-7; TR 350-18, para 3-11; TR 350-10, para 2-9; CMP; SEP; TSP

b. Criteria
> Organization uses only proponent-developed questions/tests.
> Tests are administered following proponent provided guidance.
> Students have been given the SEP or have been informed of the SEP requirements. SEP should be posted where students can view it.
> TD Proponent only: SEP was provided to using organizations

c. Guidelines
> Verify that SEP is current for course being taught.

d. Mandatory Comments
> Document problems identified with test administration that could not be resolved.

e. Required Documentation
> Student Evaluation Plan (SEP) for courses in session.
> Copies of memos, etc. informing the TD proponent of problems with the provided test and testing materials.

Standard 26 Institution complies with ATRRS data entry requirements.

a. References

AR 350-10, para 1-4 & 3-1; TR 350-6, Apx H & J; TR 350-18, Ch 3; TR 350-10, para 2-4; Memorandum, HQDA, ODCSOPS, DAMO-TR, 1 Feb 93, subject: Individual Training Management -- RCs in ATRRS

b. Criteria

> ATRRS includes all courses and DL phases/modules for which the Education/training organization is proponent.
> Organization posts current student prerequisite and orientation information in ATRRS.
> Training institution enters student status codes IAW DAMO-TR guidelines.

c. Guidelines

> Compare course documentation to ATRRS entries.
> Verify that current student prerequisite and orientation information is in ATRRS, if appropriate.

d. Mandatory Comments

> Document if maintenance of the ATRRS data is a systemic problem.

e. Required Documentation

> ATRRS print out of courses and DL phases for which the organization trains.
> TD Proponent only: List of proponent's, courses/phases, by title, number, and training sites.

Standard 27 Institution distributes materials required for course preparation to incoming students in a timely manner.

a. References
TR 350-10, para 2-4; TR 350-18, para 3-5; CMP; POI; TSP

b. Criteria
> Materials required to prepare for the course were provided to students in sufficient time to accomplish the required advance preparation.
> Only materials required by the course documentation are provided to the student.
> Distribution agency only: Correct materials are provided in a timely manner.

c. Guidelines
> Compare material provided with course documentation.
> Interview students currently enrolled in the course.
> Review end-of-course critiques.

d. Mandatory Comments
> Document instances of students not receiving required materials.
> Document if HHI. This may be a problem caused by organizations external to the education/training organization and/or a higher HQ issue.

e. Required Documentation
> List of courses in session that require distribution of materials to the student prior to reporting for education/training.
> List of the materials the students are to receive prior to reporting for the education/training.
> Identify the organization responsible for the distribution of the learning materials.

Standard 28 Institution conducts courses within minimum and maximum class size limitations.

a. References
TR 350-70, Ch II-8; TR 350-10, para 5-11; Course Administrative Data (CAD); POI

b. Criteria
> Class enrollment conforms to class size limitations.
> There is documentary evidence that the organization has taken steps to alleviate the problem when class size limitations are violated repeatedly.

c. Guidelines
> Compare CAD/POI class size limitations to student enrollment in selected courses.
> Determine if waivers were granted for each class that did not meet the size criteria requirement.

d. Mandatory Comments
> Document the fact if there is no waiver granting authority to conduct education/training when class size violates criteria and describe the detriment to education/training.

e. Required Documentation
> POI showing maximum and minimum class size.
> Class sizes for previous 12 months.
> Identified instances where class size did not meet requirements.
> Copies of waivers granted.
> Documentation showing actions the organization took to prevent/alleviate the problem.

Standard 29 Institution conducts on-site risk assessments and takes action as appropriate.

a. References
FM 100-14, Risk Management; TR 350-6, Ch 2; TR 350-70, Ch I-2; TR 350-10, paras 2-17, 2-18, & 2-19; TR 350-18, para 3-4; TR 385-2, TRADOC Safety Program, 27 Jan 00; TSP; Lesson Plan

b. Criteria
> Onsite leader/instructor/facilitator conducts a risk assessment prior to the performance of any and all practical exercises and takes appropriate action to reduce risk.
> Risk assessments are addressed in the lesson material.

c. Guidelines
> Observe the conduct of at least one risk assessment.

d. Mandatory Comments
> Document any case where risk assessments are not conducted when needed. (e.g., conduct of a FTX, conduct of a potentially hazardous PE.)

e. Required Documentation
None

Standard 30 Institution conducts after action reviews (AAR)/sensing sessions as required by the course material.

a. References

FM 25-101, Ch 5; FM 25-100, Page 5-1 & Page 5-2; TR 350-6, Ch 2; TR 350-70, Ch III-4 & IV-7; TSP; Lesson Plans

b. Criteria

> AAR's/sensing sessions are conducted IAW lesson plans.

c. Guidelines

> Observe at least one AAR/sensing session for each course in session when applicable.
> Talk to instructors and students.

d. Mandatory Comments

> Document each occurrence where a required AAR/sensing session is not conducted.
> Document instances of lesson plans calling for a FTX, CPX, STX, or other similar exercise without calling for or allowing time for the AAR/sensing session.
> Document instances when mandatory sensing sessions are not conducted.

e. Required Documentation

> Copies of lesson plans that call for a FTX, CPX, STX, etc. for courses in session.

Standard 31 Institution provides remedial training.

a. References
TR 350-6, para 3-33; TR 350-70, Ch II-2; TR 350-10, para 2-7; CMP; SEP; DSSC CMP, Ch 1

b. Criteria
> Remedial education/training is conducted.
> Remedial training is included on the training schedule during non-academic hours.

c. Guidelines
> Review education/training organization's SOP covering remedial-training procedures.
> Check training schedules for each course in session.
> Talk to instructors and students.

d. Mandatory Comments
> Document instances where remedial training was not provided when needed.

e. Required Documentation
> Copy of organization SOP.

Standard 32 Institution conducts physical fitness training.

a. References
AR 350-41, paras 9-5 & 9-8; AR 600-9; FM 21-20; TR 350-6, Ch 4; TR 350-10, para 2-6; CMP; POI; Lesson Plan

b. Criteria
> Physical fitness training is conducted IAW applicable references.

c. Guidelines
> The POI/CMP may dictate physical fitness training hours.
> There may be specific requirements for how PT is conducted (e.g., NCOES will have student-led PT programs).
> Check PT for each course in session, as required.

d. Mandatory Comments
> Document instances where the PT is required and is not conducted.

e. Required Documentation
> Training schedule.
> Lesson plans that include a requirement for physical training for courses in session.

Standard 33 Enrolled students meet course prerequisites.

a. References

AR 350-41, para 9-2; AR 351-1, paras 1-13, 5-16, 5-18, 5-20, & 5-33; AR 600-9; AR 614- 200, para 8-15; NGR 600-200, Ch 11; DA PAM 611-21; TR 350-16, Ch 2 TR 350-18, para 3-25; TR 350-10, Chs 2 & 5; POI; CMP

b. Criteria

> All reporting students meet course academic and non-academic prerequisites.
> Education/training organization collects pre-execution checklist and verifies all entries are completed and any required attachments are present (as applicable).
> Education/training organization does not enroll students not meeting course prerequisites.
> Appropriate action was taken for individuals who do not meet the prerequisites.

c. Guidelines

> Enrollment of a student who does not meet prerequisites will constitute a NO GO unless a written waiver has been granted.
> Check the in-processing roster to identify students with profiles.
> Check the record of every student on-site with a profile; every record must meet the standards. Records of students with P3 or P4 profiles must contain Medical Review Board (MRB) results.

d. Mandatory Comments

> For every student found not to meet course prerequisites, make a note of the student's unit of assignment, course, and class. Include this information in the summary report as HHI.
> Document if enrollment of students who do not meet course/phase/module prerequisites is a systemic problem.

e. Required Documentation

> Processing roster for classes in session.
> Access to student records of those students who have a profile.
> Pre-execution checklists.
> Written waivers.

Standard 34 Institution processes students released from courses IAW references.

a. References

AR 351-1, paras 1-10 & 5-30; AR 614-200, Ch 8; AR 623-1, Ch 1; TR 350-6, Ch 3
TR 350-16, Ch 2; TR 350-18, paras 3-32 & 3-33; TR 350-10, para 2-11

b. Criteria

> Correct ATRRS status code is assigned to released students.
> Students who are released from a course receive the proper notification.

c. Guidelines

> Verify correct status codes are assigned.
> Spot-check dismissal records.

d. Mandatory Comments

> Document discrepancies found in student dismissal files.

e. Required Documentation

> Access to student dismissal files.

Standard 35 Institution has a policy for retraining students.

a. References
TR 350-6, Ch 2, 3 & Apx J; TR 350-18, para 3-2; Local SOP

b. Criteria
> Institution has an SOP/written policy for retraining.
> Students that have been removed from a class are re-enrolled into a following class when feasible.

c. Guidelines
> Check student records to identify students who were recycled, are in danger of failure, or were removed from the course.
> Policy should address time, student physical limitations, student performance record, motivation, et al.

d. Mandatory Comments
> Document if organization has no standard procedures established for determining which students should be retrained.

e. Required Documentation
> Access to SOP/written policy.
> Access to student records.

Standard 36 Institution maintains student attendance record.

a. References
AR 25-400-2, Table 3-1; MARK FN 351a; TR 350-6, para 3-7 & Apx G; TR 350-10, paras 2-8 & 5-4; TR 350-18, paras 3-12 & 3-28; DSSC CMP, Ch 2; Institution's SOP

b. Criteria
> Attendance records are maintained accurately.
> Attendance records are used to track minimum attendance standards.

c. Guidelines
> Spot-check records. (Check records from each type of course the education/training organization teaches, i.e., MOSQ, NCOES, WOES, OES).

d. Mandatory Comments
> Document if maintenance of attendance records is a problem.
> Document if absences exceed course requirements.

e. Required Documentation
> Access to attendance records.

Standard 37 Student records contain required documentation.

a. References
TR 350-6, Ch 3 & Apx G; TR 350-10, para 2-8; TR 350-18, paras 3-12, 3-13, & 3-28

b. Criteria
> Entries in records of students currently enrolled are up to date and accurate.

c. Guidelines
> Spot check records selected at random.

d. Mandatory Comments
> Document when student record maintenance is identified as a problem.

e. Required Documentation
> Access to student records.

Standard 38 Institution processes students who fail to maintain body composition standards IAW references.

a. References

AR 350-41, para 9-8; AR 351-1, paras 1-13 & 5-32; AR 600-9, Ch 1 (interim change 1); TR 350-6, Ch 3; TR 350-10, para 2-6; TR 350-18, paras 3-28 & 3-32; Institution's SOP

b. Criteria

> Organization has procedures in place to verify that students maintain body composition standards.
> Organization complies with their procedures to manage students who fail to maintain body composition standards.

c. Guidelines

> Review student records to identify how Education/training organization has managed students who fail to maintain body composition standards.
> Discuss procedures with Education/training organization staff.
> Check records of all soldiers identified as overweight. Students identified as overweight after enrollment must be processed IAW Army Regulation 600-9.
> Ensure height and weight data are annotated in AERs/ITRs.

d. Mandatory Comments

> Document when organization does not process students IAW references.

e. Required Documentation

> Access to student records.

Standard 39 Institution prepares and distributes training evaluation reports as appropriate.

a. References

AR 351-1, paras 5-27 & 5-30; AR 623-1, Chs 1 & 2; TR 350-6, Apx G; TR 350-10, para 2-7; TR 350-18, paras 3-29 & 3-30; DSSC POI, Ch 1; POI; CMP

b. Criteria

> A DA Form 1059 (AER)/DA Form 5286-R (ITR) is prepared on all students as appropriate IAW references.
> Adverse AERs are referred to the student for acknowledgment and comment.

c. Guidelines

> Check to see if the education/training organization has a procedure to ensure proper distribution of AERs/ITRs.
> Spot-check AERs/ITRs. Evaluate records from each type of course the education/training organization teaches (e.g., MOSQ, NCOES, WOES, OES).

d. Mandatory Comments

> Document if inadequate AER/ITR maintenance is a problem.

e. Required Documentation

> Access to AERs/ITRs.
> Copy of SOP or other document delineating organizations procedure for handling AERs/ITRs.

Standard 40 School/institution has written policies for Equal Employment Opportunity and Sexual Harassment.

a. References
AR 600-20, Chs 6 & 7; TR 350-6, paras 2-6 & 2-12; TR 350-18, para 3-2; Institution's SOP

b. Criteria
> Institution has written policies for Equal Employment Opportunity and Sexual Harassment.
> Institution makes available to students and staff standing operating procedures (SOP) or
policy documents (must be posted on bulleting board).
> Institution has trained equal opportunity personnel.

c. Guidelines
> Check for documentary evidence of Equal Employment Opportunity and Sexual Harassment policies.
> Verify that relevant SOP or policy memoranda are made available to students and staff.
Check for posting at training sites where the policies must be enforced.
> Check for documentary evidence that school has trained EEO personnel.

d. Mandatory Comments
> Document absence of written EEO and/or POSH policies.

e. Required Documentation
> Standing operating procedures or policy documents on Equal Opportunity and Sexual Harassment.
> Documentary proof that EEO representative has completed appropriate training.

Standard 41 Education/training organization provides for the health, welfare, and quality of life of soldiers.

a. References
AR 210-50, paras 3-40 & 3-43; TR 350-10, paras 2-4 & 2-5

b. Criteria
> Support activities (in/out-processing, mailroom, operations, tasking, scheduling, equipment maintenance, dining facility, finance, supply, etc.) are available to meet the needs of the education/training organization, adequately support the training mission, and provide for the health and welfare of soldiers.
> Institution provides staff/student non-academic counseling.
> Institution provides staff/student advisory services.
> Dining facilities are available to ensure learners and staff have sufficient time to acquire proper nourishment.
> Laundry facilities/services are:
- Readily available.
- High quality and timely.

c. Guidelines
> Interview students and instructors to identify problems.
> Review end-of-course critiques.

d. Mandatory Comments
> Document systemic problems.

e. Required Documentation
> List of advisory services available to the students.
> List of MWR facilities and services.
> Description of any identified endemic problems with student support activities and documentation of corrective actions taken.
> End-of-course critiques.

Standard 42 **Institution has quality assurance and quality control functions in place to identify education/training program deficiencies and coordinate corrections.**

a. References

TR 350-6, Chs 2 & 3; TR 350-70, Part III; TR Pam 350-70-4, Chs 8 & 9; Memo, ATTG-CD, 12 Jun 00, TRADOC Evaluation and Quality Assurance (QA) Program; Institution's SOP

b. Criteria

> Quality Assurance (QA)/Quality Control (QC) SOP/instructions implemented.
> TD Proponent only: Evaluators actively participate in development of education/training programs and products.

c. Guidelines

> Review organization's SOP and Missions and Functions documents.
> TD Proponent only: Check Project management Plans to determine if QA personnel are identified as part of the development team.

d. Mandatory Comments

> Record failure of organization to have QA/QC SOP/instructions implemented.
> Record failure of organization to identify deficiencies and take corrective action.
> Identify HHIs.

e. Required Documentation

> Copies of QA/QC SOP/instructions.

Standard 43 Conducts internal and external evaluations.

a. References
TR 350-10, paras 1-4 & 2-7; TR 350-70, Part III; TR Pam 350-70-4, Chs 8 & 9

b. Criteria
TD Proponent only:
> Has a current Master Evaluation Plan (MEP).
> Conducted internal evaluations.
> Conducted external evaluations to determine if education/training met unit requirements.
> Evaluations:
- Determined the efficiency and effectiveness of the education/training.
- Identified more economical means for presenting the education/training.

c. Guidelines
> Review proponent MEPs to determine what evaluations were scheduled.
> Review results of evaluations.
> Review documented justification as to the non-conduct of internal or external evaluations.

d. Mandatory Comments
> Document where, when, and why internal or external evaluations were not conducted as planned, were not planned, or no evaluation program exists.

e. Required Documentation
> Copy of current proponent Master Evaluation Plan.
> Lists of internal and external course evaluations conducted in current and previous FY.
> Reason for non-conduct of planned internal or external evaluations for last FY.
> Copy of evaluation reports.

Standard 44 **Instructors do not use copyright and intellectual materials in education/ training unless appropriate written releases have been obtained and are on file.**

a. References
Federal law; TR 350-70, Chapter I-1; DoD Instructions

b. Criteria
> Copyright and intellectual material is not used in education/training unless appropriate written releases are on hand.

c. Guidelines
> Interview staff to identify potential copyright infringements.
> Study course document and identify material that could be copyright material. Review should include text, graphics, and audio.

d. Mandatory Comments
> Document all cases of government use of copyright material without written authority to do so.

e. Required Documentation
> Written approval to use specific copyright material in their education/training program.

Standard 45 Institution has corrected previously identified accreditation, evaluation, and QAO shortcomings.

a. References
TR 350-70, Part III; TR 350-10, para 2-15; Previous accreditation reports

b. Criteria
> Organization corrected previously identified shortcomings or raised issue to higher HQ when they could not resolve the issue.

c. Guidelines
> Review previous accreditation and Quality Assurance office (QAO) findings and results.
> Check at training sites where previous shortcomings were recorded.
> Verify the organization has written justification of all failures to correct shortcomings identified in a previous accreditation evaluation.

d. Mandatory Comments
> Previous shortcomings found not corrected and not justified in writing prior to the start of the evaluation, will be cause for a NOT MET rating.
> Document instances where identified deficiencies were not corrected and the reason for the failure to correct the deficiencies. May be HHI.

e. Required Documentation
> All short comings identified in previous accreditation and QAO reports.
> Written justification for failure to correct previously.

Standard 46 Students demonstrate working knowledge of COE and OPFOR doctrine.

a. References
FM 7-100 (draft); FM 7-100-1 (draft); FM 7-100-2 (draft); FM 7-100-3 (draft); FM 3-0, OPFOR; COE White Paper, May 2001

b. Criteria
> Students participate in a training exercise conducted in a COE tactical or operational environment against a FM 7-100 series opponent.
> Students plan, prepare, and execute operations successfully against an adaptive force in a COE environment.
> Students successfully complete projects or examinations in which COE and OPFOR doctrine are incorporated.

c. Guidelines
> Observe student performance and/or review project output.

d. Mandatory Comments
> Document instances in which student failure to complete projects or examinations successfully can be attributed to a lack of understanding of COE and/or OPFOR doctrine.

e. Required Documentation
> Training Exercise POI.
> Training Exercise Operations Order and Graphics.

Standard 47 Institution ensures all soldiers/officers meet mandatory graduation requirements (IMT only).

a. References
AR 351-1, para 1-5; TR 350-6, para 1-5

b. Criteria
> Procedures are in place to verify mandatory graduation requirements have been met.
> Students not meeting these requirements are not graduated.

c. Guidelines
> Review records of most recent graduating classes.

d. Mandatory Comments
> Record any instances of graduates not having met the mandatory requirements.

e. Required Documentation
> List of mandatory graduation requirements for each type of IET course.
> Access to student records of recent graduates.
> Student Evaluation Plan for each IMT course.

Tab 1

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Standard 1 Reference Excerpts

TR 350-6, para 1-5a(1), Objectives for IET.

(1) An IET soldier is MOSQ upon successful completion of all BCT and AIT/OSUT requirements. The MOSQ soldier can perform to standard the institutionally taught critical Skill Level 1 tasks identified by the MOS proponent.

TR 350-6, para 1-5c.

c. In addition to attainment of the central objectives listed above, every IET soldier is required to meet the qualification requirements specified in the course Student Evaluation Plan (SEP) or other appropriate course documentation. These requirements include, but are not limited to:

(1) Basic Combat Training and Phases I-III of OSUT:

(a) Complete the Army Physical Fitness Test (APFT) with a minimum of 50 points in each event, 150 points total.

(b) Qualify with individual weapon.

(c) Pass all end-of-phase tests (Phases I-III).

(d) Complete all obstacle and confidence courses as prescribed in the appropriate TSP

(e) Complete bayonet and pugil training as prescribed in the appropriate TSP.

(f) Complete hand-to-hand combat training as prescribed in the appropriate TSP.

(g) Throw two live hand grenades and negotiate the Hand Grenade Qualification Course as prescribed in the appropriate TSP.

(h) Complete the Protective Mask Confidence exercise.

(i) Demonstrate a willingness to live by the Army's seven core values.

(j) Demonstrate the capability to operate effectively as a team member.

(k) Complete all foot and tactical road marches required by this regulation and the appropriate TSP.

(l) Complete all tactical field training and field training exercises (FTXs) required by this regulation and the appropriate TSP.

(2) Advanced Individual Training and Phases IV-V of OSUT:

(a) Pass the APFT at the ATC/TRADOC school with a minimum of 60 points in each event, 180 points total.

(b) Pass all end-of-phase tests.

(c) Demonstrate performance of MOS-specific critical tasks (tasks determined mandatory for the awarding of a MOS) as identified by the proponent school and as prescribed in the appropriate TSP.

(d) Complete all foot and tactical road marches required by this regulation and the appropriate TSP.

(e) Complete all tactical field training and FTXs required by this regulation and the appropriate TSP.

Standard 1 Reference Excerpts

TR 350-6, para 2-2, Phased training.

a. Phases and associated goals provide intermediate objectives that give common direction and serve as milestones during IET. The training cadre informs IET soldiers of the goals and standards for each phase of training. Movement from each phase is viewed as a "gate" for each soldier. The training cadre evaluates each soldier's performance by the standards for each phase before advancing to the next phase. The five training phases and associated goals and privileges are shown at table 2-1.

b. The first three phases of IET are associated with BCT, and the BCT portion of OSUT. The last two phases are associated with AIT and the MOS training portion of OSUT. In OSUT courses, Phases III and IV may be combined. This will generally depend on how early in the course MOS training begins, and whether basic skills testing is conducted at mid-cycle or end-of-cycle. The senior IET commander can adjust the established phase length to ensure soldiers are trained to the course standards.

(1) Phase I is designated as the "Red" phase. This phase encompasses weeks 1-3 of IET and is characterized by an environment of total control where active, involved, positive leaders begin transforming volunteers into soldiers. Training during this phase is focused on immersion in the Army's core values, traditions, and ethics; the development of individual basic combat skills; the development of teamwork; and physical fitness training. The goals for soldiers in Phase I include, but are not limited to:

(a) Pass Phase I test.
(b) Pay strict attention to detail.
(c) Conform to established standards.
(d) Begin to work effectively as a team member.
(e) Master basic skills.
(f) Maintain individual and platoon areas.
(g) Develop physical fitness consistent with time in training.
(h) Receive an introduction to the Army's values, history, heritage, and traditions.
(i) Demonstrate the capability to operate effectively in a stressful environment.

(2) Phase II is designated as the "White" phase. This phase encompasses weeks 4-6 of IET. This phase is centered on the development of basic combat skills, with special emphasis on weapon proficiency and physical fitness training. Skill development, self-discipline, and team building characterize phase II, along with a lessening of control commensurate with demonstrated performance and responsibility. Soldiers receive additional instruction on Army values, ethics, history, and traditions. The goals for IET soldiers in Phase II include, but are not limited to:

(a) Pass the Phase II test.
(b) Conform to established standards.
(c) Display self-discipline.
(d) Qualify with the M16A2 rifle or assigned weapon.
(e) Develop physical fitness consistent with time in training.
(f) Continue to develop capability to work as a team member under stressful conditions.
(g) Receive reinforcement training on Army history, heritage, and

traditions; articulate the Army's values.

(3) Phase III is designated as the "Blue" phase. This is the last phase of BCT and encompasses weeks 7-9 of IET. This phase concentrates on individual tactical training, increased soldier leadership, increased self-discipline, and the IET soldier's understanding of the importance of teamwork. This phase culminates with the application of all skills learned in BCT during a 72-hour FTX. This exercise is designed to stress IET soldiers physically and mentally, and requires each soldier to demonstrate their proficiency of basic combat skills in a stressful tactical field environment while operating as part of a team. In BCT, successful demonstration of all phase III skills will be commemorated by a "rite of passage" ceremony, marking the transformation from volunteer to soldier. In OSUT, transition from phase III to phase IV will be marked with an appropriate ceremony. The goals for soldiers in Phase III include, but are not limited to:

(a) Conform to Army standards.
(b) Complete the APFT to BCT standard (50 points each event, 150 points total).
(c) Complete all BCT POI requirements.
(d) Demonstrate the ability to think, look, and act like a soldier without detailed supervision.
(e) Demonstrate knowledge of the Army's values, history, heritage, and traditions.
(f) Demonstrate the capability to operate effectively as a team member under stressful conditions.

(4) Phases IV and V of the soldierization program occur in AIT and OSUT and are characterized by lessening of control and increased emphasis on personal responsibility and accountability. Initial entry soldiers also receive reinforcement training on Army Values and teamwork and an introduction to the history, heritage, and traditions of their specialty branch. This lessening of control, expansion of privileges, and focus on MOS skills are all part of the evolutionary process marking the transformation from volunteer to soldier.

(a) Phase IV begins at the start of the 10th week and continues to the end of the 13th week. It is characterized by reduced supervision by drill sergeants, reinforcement training on common skills, values, and traditions taught in BCT, and increased emphasis on MOS tasks. Upon arrival at the AIT unit, IET soldiers starting AIT will receive initial counseling. This session will be used to establish goals consistent with the soldier's MOS training requirements as prescribed in the appropriate POI and this regulation.

(b) Phase V begins at the start of the 14th week and continues until completion of IET or the 20th week of training. It is characterized by reinforcement training on common skills, training and evaluation of MOS skills, a leadership environment that simulates the environment in an operational unit, and a culminating tactical FTX that integrates common and MOS tasks. This exercise is designed to reinforce the basic combat skills learned in BCT, and their application to the soldier in the execution of MOS-related duties in a tactical field environment.

(c) Phase V+ begins at week 21 and continues through completion. Phase V+ soldiers will be billeted separately from other IET soldiers and, at the commanders'

discretion, privileges will approximate those held by permanent party soldiers. On installations where separation from other IET soldiers is not possible, use of tobacco and alcohol will be restricted. Graduates of IET who attend follow-on training prior to arriving at their gaining unit will comply with the same requirements. Graduates of DLIFLC will retain their Phase V+ privileges (see app C) during their AIT.

(d) Initial Entry Training commanders may implement Fast Track programs as described in appendix D. Fast Track programs recognize the superior capabilities of selected IET soldiers, and provide them opportunities for additional MOS training and early promotion.

(5) Graduation from OSUT/AIT signifies successful completion of the first five phases of the soldierization program. Units conducting AIT will conduct an appropriate branch pinning ceremony in conjunction with the awarding of the MOS.

c. The following formal counseling requirements will be met for all IET soldiers:

(1) Company commanders will ensure subordinate leaders counsel soldiers within 72 hours of arrival at the training unit.

(2) Soldiers are counseled at the conclusion of each phase of training.

(3) Counseling includes an objective evaluation of the soldier's progress, adherence to Army Values, capability to operate as a team member, and establishment of attainable goals for the next phase of training.

(4) Soldiers are counseled on the provisions for additional training should they not be able to meet established standards and requirements (e.g., new start, rehabilitative transfer, remedial training).

(5) All performance counseling will be documented on DA Form 4856 (Developmental Counseling Form) or on a locally produced form.

d. Installations will use phase banners to distinguish a platoon's phase of training and recognize the passage of a platoon from one phase to another. Guidons are not authorized at the IET platoon level IAW Army Regulation (AR) 840-10.

(1) Local programs will be established that govern the awarding, carrying, and displaying of platoon banners.

(2) Banners will be attached to a standard 7-foot flagstaff (marker and marker pennant's flagstaff). The flagstaff head (finial) will be an acorn to distinguish it from the company guidon.

(3) Banners will be made of nylon bunting.

(4) Banners will be solid colors.

(5) Color designations for the five IET phases are:

(a) Red for Phase I.

(b) White for Phase II.

(c) Blue for Phase III.

(d) Black for Phase IV.

(e) Gold for Phase V.

(6) Banners will be swallow-tailed in shape. The finished dimensions will be 18 inches high by 30 inches wide with the "V" 5 inches deep. The hem on the 18-inch straight side will provide a pocket designed to fit a flagstaff. The other hems will be 1-inch deep.

(7) At AIT installations where IET platoons include Phase IV and Phase V soldiers in the same platoon, the senior IET commander is authorized to exempt those platoons from using phase banners.

(8) Platoon achievement streamers may be used with the banners to recognize achievement in various platoon level training events/activities.

TR 350-70, para II-I-7c, Instructional Process/ Program.

c. Evaluation of the instructional process/program is critical to determine the effectiveness of courses of instruction for which the school has proponency. It is an independent determination of the quality of training and testing while concentrating on the actual presentation of instruction-presented and self-paced training, competency of instructors and examiners, relevance as well as adherence of course content to the training objectives, management and usability of DL training/training products, and training transfer.

(1)Instruction.

(b) Evaluation of student testing/performance measurement. Students must perform to standards and conditions prescribed in lesson plans/lessons. The DOES:

1 Students are tested to determine whether or not they can accomplish the Terminal Learning Objectives (TLOs).

Note 1: It is not the intent of this policy to have the QA activity (DOES) conduct testing.

Note 2: See Chapter VI-7, Student Performance Measurement/Testing.

2 Provides a selective, independent assessment of validity and suitability of resident and nonresident tests (e.g., distance learning material, etc).

3 Verifies tests have been reviewed/analyzed for reliability.

4 Verifies and provides comments on the quality of test construction and instructions to testers and students.

5 Determines if tests measure task performance to TLO standards.

6 Maintains statistics on test results to determine trends and provides feedback to departments on adequacy of tests and test items. Automated systems should provide test results, and all directorates, to include DOES, should have access to the data.

TR 350-70, VI-6.

VI-6-3. Training Course Design Process Description and Requirements

Description a. Course design translates critical task analysis data into sequential, progressive training. It ---

(1) Is the process used to determine the optimum training strategy for each individual critical task and supporting skills and knowledge.
(2) Is the process used to translate each individual critical task and supporting skills and knowledge into learning objectives.
(3) Ensures the overall efficiency and effectiveness of the total training program/ system.
(4) Identifies all resource requirements.
(5) Establishes ---
(a) How (media/method), when, and where training will be conducted.
(b) Training structure (courses, phases, annexes, lessons, etc.).
(c) Mandatory training sequence.
(d) Unit/student tests.
(e) Graduation requirements.

Outputs

b. Training course design is a **minimum essential requirement** before development of training courses, including correspondence subcourses and courses/lessons using VTT, IMI and TADSS. **Required** training course design outputs:
(1) Designed peacetime and mobilization courses, consisting of **---**
(a) Mandatory training sequence.
(b) Training course length.
(c) Lesson outlines (including learning objectives).
(d) Training resource requirements.
(e) Student Evaluation Plan.
(f) Course Map.
(g) Test items/test design.
(h) Scripts and story boards (as appropriate).
(2) Course Management Plan (CMP).
(3) Compiled POI.
(4) Course Administrative Data (CAD).
(5) Revised ITP.

Start Point

c. Courses may be developed for a new job or redesigned to maintain currency.
(1) **New:** Individual training course design is initiated when short-term individual training strategies determine (through the use of task analysis data during the conduct of site and media selection) that the most cost efficient and effective training is a training course.
(2) **Revision/** Course revision or redesign occurs when a combined arms training
Redesign: strategy or needs analysis indicates a requirement to change or update the training or when there is a new, more efficient/effective way to present training. Redesign can consist of minor course revisions or the major

redesign of a course to accommodate new equipment requirements, etc.

Note: Do not revise existing course products just to meet new format requirements. Training proponent should incorporate new formats required by this regulation only when these products undergo revision for major content changes.

Criteria for Resident Training

d. Reasons for deciding to train a particular task or supporting skill/knowledge in resident training are as follows:

Equipment/ facilities availability	This hinges on several factors such as availability, cost, location, and safety/environmental considerations. It includes the hands-on portion of the training but not the knowledge foundation which should usually be done by distance learning. IMI should be considered for use in presenting equipment demonstrations and practice when cost effective and efficient. IMI can be used in resident training or for distance learning.
Personnel interface requirement	This is training where the interface between students or instructor/ student is vital. It includes such things as leadership demonstration, live exercises, and solderization. The knowledge foundation for this training should be presented via distance learning.
Security	This is a controlling factor but not a TD reason. Classified training should not be presented by any means that violates security. Distance learning should not be used for presenting classified training unless there is a secure means for controlling that training.
Cost efficiency	There are factors that make distance learning inefficient. For example, if there are a large number of individuals in the target audience, then development of IMI may make sense. However, if there are very few members in the target audience or task performance procedures change frequently, then it may not be cost effective to develop or distribute an IMI.

Training Course Design Procedures

e. The following procedures and major requirements apply to training course design. They cover design of resident training courses; lesson plans; correspondence subcourses; and courses/lessons using VTT, multimedia (including IMI), and TADSS. See appropriate product chapter in this regulation for development guidance for these products.

Note 1: See Section VI-6-4, TATS Course Design Requirements, for TATS Course-specific design guidance.

Note 2: See Chapter II-9, DL, for DL course structure guidance.

Note 3: Use the HQ TRADOC TD automation system (currently ASAT suite of tools) as the automation tools meet the course design functional requirements in this regulation.

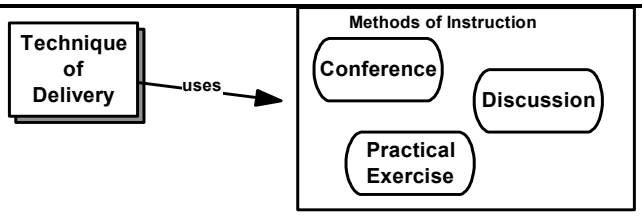
Step	Activities
(1) Establish the design team.	(a) Include the same individuals who conducted the analysis. (b) Use same team for development also.
(2) Acquire the analysis data.	(a) Revisit job to verify critical tasks (reconvene tasks selection board as necessary). (b) Review/revise task analysis data as necessary. (c) Make appropriate revisions per Chapters VI-1, Job Analysis, and VI-2, Individual Task Analysis. (d) Use the task analysis data to perform the following steps.
(3) Establish purpose and scope of training.	(a) Identify training prerequisites. ***Note:*** See "Training Prerequisites" (this chapter). (b) Verify tasks and supporting skills and knowledge to be trained. ***Note 1:*** See Chapter VI 4, Individual Training Design. ***Note 2:*** Short-range training strategies have determined initial media selection for each task.

Training Course Design Procedures (Continued)

Step	Activities
(4) Establish training structure.	(a) Determine --- 1 Phases. 2 Modules (e.g., subcourse). 3 Lessons. 4 Tests. ***Note:*** See "Structuring and Sequencing" (this chapter). (b) Establish the technique(s) of delivery for each module. This is the manner in which instruction will be presented. Training designers must give special attention when designing courses into modules for distance learning to ensure that techniques of delivery per module are conducive for DL module management. **Examples** of techniques of delivery are Small Group Instruction (SGI) and VTT. ***Note 1:*** See Appendix H, Methods and Techniques for Delivering Instruction. ***Note 2:*** *Advisor 3.0* is a useful tool for determining media effectiveness and return on investment at the course and module level. ***Note 3:*** Recommend use of Artificially Intelligent Managers Media Model (AIMMM) for determining the feasibility, acceptability, and supportability of a media approach for a course or module. (c) For TASS Training Battalion, assign each module, including distance learning modules, against AT/ADT or IDT for implementation management purposes. Implementation may include resident or non-resident training per design. (d) Design courses as appropriate to be adaptable for reclassification training. Common core, shared, and military occupational specialty (MOS)/area of concentration (AOC)-specific training should be separate modules to allow for reclassification training of branch as well as new shared task training within one TATS Training Year.

(5)Create the lesson outlines.	***Note:*** The lesson outline is the skeleton that becomes the lesson plan or self-paced lesson. See "Lesson Outline" (this chapter). (a) Write one TLO per lesson. (See "Learning Objectives (LO) Descriptive Details" (this chapter). (b) Write ELOs as needed. Recommend use of Media Elimination & Design Intelligent Aid (MEDIA). (c) Write learning steps/activities. (d) Include at the proper level IAW "Learning Steps/Activities Descriptive Details" (this chapter): 1 Environmental factors and considerations. 2 Safety notes and cautions. 3 Sustainment training requirements. 4 Reference information, e.g., title, chapter, paragraph number. 5 Distance learning considerations when determining --- a Methods of instruction. This is the way instruction will be presented to the students. **Examples** of methods of instruction are conference, demonstration, practical exercise, and test. (see Appendix H). b Technique of delivery and Media selection, considering user capabilities.

Training Course Design Procedures (Continued)

Step	Activities
(5)Create the lesson outlines. (continued)	 ***Note 1:*** See Chapter II-9, Paragraph II-9-5, for DL technique of delivery and media selection guidance. ***Note 2:*** Recommend use of MEDIA. ***Note 3:*** Support the live, virtual, and constructive training environments by considering the use of constructive or virtual simulation at crawl, walk, or run levels for task training that is too expensive, dangerous, or ecologically/ environmentally unsound to conduct live. ***Note 4:*** Consider the crawl/walk/run concept. (e) Assign a risk code for each lesson. (f) Identify copyright, classification marking, and FD restriction statement requirements IAW Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/ Proprietary Materials (g) Determine need for outside student assignments.
(6) Create a Lesson Title.	Write a lesson title and assign a lesson number. Title may be the same as the critical task if the lesson covers a single task in its entirety. It will be different to reflect lesson content if the lesson covers more than one task or skills/knowledge covering several tasks.
(7) Write test items, tests, and Student Evaluation Plan.	(a) Write criterion-referenced test items that measure the performance required by the learning objective. ***Note:***Items should be written immediately after writing the TLO/ELO(s). (b) Construct test instrument. (c) Write the Student Evaluation Plan, to include graduation criteria. ***Note:*** See Chapter VI 7, Student Performance Measurement/Testing, for test development and Student Evaluation Plan policy and guidance.

	(8) Establish training sequence.	(a) Sequence --- 1 Terminal learning objectives, enabling learning objectives, learning steps/activities. 2 Courses, phases, modules (subcourses), lessons, tests. (b) Build the course map, identifying acceptable alternate sequences. ***Note:*** See "Structuring and Sequencing" (this chapter).
	(9) Establish training length.	Calculate **total** training length by compiling time requirements for each lesson (see Chapter II-8, TRAS). The training length is a factor of how long it takes to train the average student to the established standards. ***Note:*** Avoid excessive training lengths. Give prime consideration to using distance learning techniques. (a) **Lesson length** is identified in academic hours. An academic hour consists of 50 minutes of training. Lesson length is the sum of the included learning steps/activities "time of instruction (minutes)."
Design Procedures	(10) Determine total resource require-ments.	***Note:*** Avoid excessive lesson lengths. Presenting training in smaller packages helps to keep students focused on what must be learned. (b) **Module length** is the sum of included lesson lengths. (c) **Phase length** is the sum of the included module lengths. Identify all formal training and evaluation resource requirements (instructors, support personnel, classrooms, labs, training areas, ranges, OPTEMPO, ammunition, equipment, consumables, etc.). ***Note:*** See "Resource Identification" (this chapter).
	(11) Provide TRAS informa-tion.	(a) Provide Individual Training Plan (ITP) data. (b) Provide CAD data. (c) Compile the POI. See Chapter II-8, TRAS.
	(12)Obtain design and POI approvals.	
	(13)Update/revise design as needed.	

Note: The procedures listed above are for an initial course design effort. All of these steps may not be required for a revision effort.

Redundant Training

f. Avoid redundant training. Redundant training occurs when training of a task is repeated at subsequent skill levels. Training/Task (TD) proponents need to ensure that each course initially trains only those critical tasks for the skill level being trained. Refresher training is used to reinforce previous training and/or sustain/regain previously acquired skills and knowledge. Lower skill level tasks and supporting skills and knowledge may be reinforced in a higher skill level course.

Common

g. Common core is primarily organizational level critical tasks and may include some

Core Training

common soldier and common skill level tasks. Executive agents are responsible for ---

(1) Common core design and implementation within their respective education systems. They will develop common core short-range individual training strategy and implementation guidance for their respective leader development courses.

(2) Ensuring common core training is progressive, sequential, vertically aligned, and based on the job/duty requirements at the appropriate skill level.

(3) Ensuring standardized training and horizontal alignment between affected education systems.

Note: See common core responsibilities and guidance in Chapter VI-3, Individual Task Management: Common, Shared, and Branch

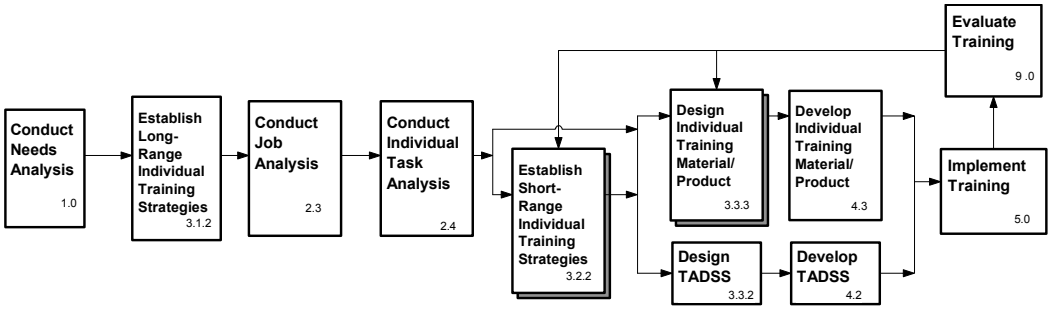
Process Completion

h. Training course design is completed when the appropriate proponent command authority approves the developed course design.

Process Flows

i. The following flow diagram depicts the relationship between training course design and other TD phases.

Process Flows (Continued)



Quality Control

j. To ensure quality results from the training, design personnel must ensure ---

(1) Training is sequential and progressive.

(2) Design applies sound training development principles.

(3) Design is technically correct.

(4) Student evaluation determines if students can accomplish the training objectives.

(5) Design includes the most efficient and effective methods of instruction, techniques of delivery, and training site selections.

VI-6-4. Total Army Training System (TATS) Course Design Requirements

Introduction

a. TRADOC's mission is to train the Total Army (i.e., Active Army (both military and civilian), Army National Guard, and U.S. Army Reserve Forces) for the full continuum of military operations. To meet this challenge, training at proponent schools and TASS Training Battalions needs to ensure the training of all course critical tasks prepare the soldier to perform to task performance standard. TATS Courses will help meet this challenge, and the goal is for all courses to be considered for redesign

as TATS courses and to eventually become TATS courses if feasible. In addition to the above training course design requirements, this paragraph contains guidance specific for TATS Course design and related issues.

Description

b. A TATS Course is a single course designed to train the same MOS/AOC skill level, Skill Qualification Identifier (SQI), additional skill identifier (ASI), Language Identifier Code (LIC), and Skill Identifier (SI) within the Total Army. It also includes MOS qualification (MOSQ, i.e., reclassification), Army leadership, functional, professional development, and civilian courses. The course's Total Army structure (phases, modules, tracks, lessons, tests) and media ensure standardization by training all soldiers (regardless of component) on course critical tasks to task performance standard. Course lengths, but not academic hours, may vary due to such differences as Active Component (AC) and Reserve Component (RC) training day lengths.

Note 1: Initial TATS Course redesign focuses on existing comparable AC and RC courses that are being redesigned as a single course meeting the training needs of the Total Army.

Note 2: The intent is for all courses to eventually become TATS Courses.

Note 3 Officer Basic Courses (OBCs) and Warrant Officer Basic Courses (WOBCs) as well as initial entry and initial active duty training (IET/IADT) (which includes Basic Combat Training [BCT], Advanced Individual Training [AIT], and one-station unit training [OSUT]) are already considered as TATS Courses as they are "one-of-a-kind" courses attended by AC/RC soldiers at the same applicable AC training sites.

Note 4: All new development of training packages exported to TASS Training Battalions will be TATS Course TSPs.

Manage-ment

c. Requirements for proponent management of TATS Courses is as follows:

(1) Review to establish currency of TATS Courses.

Note: A course is considered obsolete and in need of major revisions when over 30% of course lessons require revision. Lesson revisions would result due to task performance changes that threaten survivability/ mission accomplishment or that result in a major environmental or safety impact.

(2) Prioritize proponent TATS Course redesign/revisions, considering ---

(a) Readiness (i.e., MOSQ) and mobilization requirements.

(b) Force structure changes.

(c) MOS changes/consolidations.

(d) Course currency/obsolescence.

(e) Equipment/Doctrine changes and technological upgrades.

(f) Return on investment, i.e., training load, density of proponent MOSs within a TASS region, adaptability of ARNG/USAR time constraints, TD resources.

(g) TD backlog.

(3) Coordinate with the RC community. This is critical to ensure successful TATS Course production. Proponent schools must **coordinate through their DAC (ARNG or USAR) or TFIO for ---**
   (a) **SME support** for ---
      1 Revised job and task analyses.
      2 TATS Course design and development.
      3 Courseware validation.
   (b) **Concurrence** of each ---
      1 Proposed TATS Course Structure (including Common Core) and supporting narrative. (See Paragraph VI-6-7.f for sample.)
      2 TATS Course POI.

   Note 1: The concurrence actions occur at approximately the 35% and 50% overall course completion points (which includes analysis, design, and development actions).

   Note 2: For POIs affecting TASS Battalions: submit POIs fifteen (15) months prior to implementation of a **new** TATS course to allow time for acquisition of necessary resources (e.g., facilities, equipment, ammo, and courseware) IAW Chapter II-8, TRAS.

   Note 3: Maintain agency coordination sheets and documentation summarizing resolution/non-resolution of Proposed TATS Course Structure, POI, and validation issues. Final course documentation forwarded to HQ TRADOC (DCST, TOMA) will contain copies of coordination results.

(4) Resolve Proposed TATS Course Structure and TATS Course POI issues with NGB and USARC; forward unresolved issues to DCSED through DCST, TDAA.
(5) Forward requests for exception to TATS Training Year requirements to DCSED.
(6) Forward requests for exception to Total Army Course Structure/Media to DCST, TDAA.
(7) Schedule TATS Course design in the automated TD workload management database.
(8) Manage TATS Course analysis, design, development to ensure timely implementation.

Note: Training/TD (Task) Proponents may forward as desired electronic **info copies** of the Proposed TATS Course Structure and POIs to the Regional Coordinating Elements (RCEs), appropriate TASS training battalions, Forces Command (FORSCOM), U.S. Army Europe (USAREUR), U.S. Army Pacific (USARPAC), and other MACOMs.

Analysis d. As noted, training course design begins with a revisit to task analysis data. Training/

TD (Task) Proponents must coordinate with the RC community for SME support through the DAC (ARNG or USAR) or TFIO, as appropriate. Include RC SMEs on Task Selection Board. If on-site SMEs are not available, attempt "distance TD when automation capabilities permit.

Training Strategy

e. Proponent training strategy requirements (see Chapter VI-4, Individual Training Design):
- (1) Revise the short-range individual training strategy for the job for which a TATS Course is to be revised/developed to determine ---
  - (a) Which task(s) will be trained in the TATS Course.
  - (b) The best media to train these tasks.
- (2) Revise appropriate short-range training strategy supporting plans.
- (3) Develop a Proposed TATS Course Structure; coordinate with NGB and USARC, resolve issues, and seek exception as outlined in this chapter.

Note: Current constraints dictate that resident DL for Branch Phases of Captains Career Course will not be developed for IDT.

Course Design

f. Design TATS Courses in accordance with preceding training course design requirements in this chapter. In addition, the following requirements apply specifically to TATS Courses.
- (1) **Do not** reconfigure existing AC courses: revisit the individual training strategy and existing AC and RC versions; redesign a new TATS course to train the selected tasks to the Total Army audience.
- (2) **All TATS Courseware must be in compliance with** ---
  - (a) TRADOC Technical Media Standards. The Army has established technical multimedia standards. These standards are critical to ensure digital exchange of training data across user platforms and usability of courseware by the Total Army. They also facilitate upgrading and standardization of courseware and will reduce TD workload due to data sharing. Furthermore, the Total Army Distance Learning Program Master Plan (TADLP-MP) Program Manager (PM)/TRADOC Program Integration Office (TPIO) will not accept products that do not meet these system requirements. The ATSC will update and publish annually (by end of 2nd QTR each fiscal year) the TRADOC Technical Media Standards to be used for developing TATS courseware and products.
  - (b) Format and guidance in Appendix E, Lesson Plan, TSP, and CMP Formats and Components.
  - (c) Guidance in Appendix K, TATS Course Checklist. This list describes the components of a completed, digitized TATS Course. It will be used by Training/TD (Task) Proponents to plan for and deliver, with in-house or contract support, all components of a TATS Course suitable for training execution. It will also be used by ATSC to ensure all requisite course components have been received for delivery processing as a completed TATS Course.

(3) **Design training to allow student completion within one TATS Training Year**, to include Common Core. See "TATS Training Year" (this chapter).

Note: As an exception to the one-year TATS policy, Captains Career Course will take up to **two** TATS Training Years and the annual limit of 75 hours of distance learning per course is waived. However, Training/TD (Task) Proponents must coordinate all proposed TATS course structures with NGB and USARC and, as required, request TATS Training Year and TA course structure/media exceptions.

(4) **Use a Total Army (TA) course structure (phases, modules, tracks, lessons, tests) and media** to ensure training of all soldiers to perform to task performance standard. See "TA Course Structure/Media" (this chapter).

(5) **Design reclassification training as required.** Reclassification training entails the training of soldiers to perform a different job within a given career management field (CMF) (from one MOS/AOC to another) and across CMFs (one CMF to another). See "Reclassification Training" (this chapter).

(6) **Design considerations must include** ---

(a) The most efficient and cost effective media at the LO and learning step/activity levels, optimizing target audience accessibility/use. In general, resident training should be used to provide training that requires ---

1 Use of equipment and facilities not available during IDT.
2 Hands-on performance oriented training.
3 Direct group interface.

Note: See VI-6-3, Training Course Design Process Description and Requirement, this Chapter.

(b) Use of distance learning phases or modules, where applicable.

1 For TASS Training Battalions, ---

a DL can be accomplished during AT/ADT, IDT, or non-resident, self-paced training (outside of formal AT/ADT or IDT).

b DL modules will be identified against IDT or ADT for management purposes. TASS Training Battalion students must be assigned against either AT/ADT or IDT for DL applications. TASS Training Battalions will be responsible for ensuring all properly enrolled students receive, complete, and pass tests. IMI tests are built directly into the module, which will automatically report test/module completion to instructors.

2 For enlisted reclassification courses, the number of non-resident DL student workload hours should generally be limited to 75 hours with the reasonable expectation that a soldier could complete 2 hours per week during a TATS

Training Year. For non-resident DL exceeding 75 hours, coordinate Proposed TATS Course Structure for approval.

3 DL self-paced training modules must be fielded in a timely manner to allow for completion before follow-on training.

Note: See Chapter II-9, DL, for additional DL design guidance.

(c) Consideration of infrastructure (TASS classroom/DL facility) delivery dates in the Total Army Distance Learning Program Master Plan (TADLP MP).

(d) New equipment fieldings.

(e) Development of job aids/training on demand.

(7) **Sequence common core IAW Common Core Executive Agent guidance**.

(8) **Ensure design does not decrement ability to train to task performance/ certification standards**.

TA Course Structure/ Media

g. The intent of HQ TRADOC is for all TATS Courses to have a Total Army course structure and media. Development and maintenance of different media for the same module/lesson can double or more the costs; there is no associated funding for either initial development or maintenance of the alternative version/media.

(1) Design modules as appropriate to ensure adaptability for DL, reclassification/ transition, mobilization, and self-development training.

(2) Consider use of training tracks to allow for AC/RC hardware and media requirements/availability. Use of tracks must be in compliance with MOS/AOC qualification requirements.

(3) **Requests for Exception to Total Army Course Structure/ Media.** For all TATS Courses which do not have a single Total Army course structure/media, Training/TD (Task) Proponents will forward request for exception to DCST, TDAA. Requests for exceptions must include a Proposed TATS Course Structure and full justification for the exception to policy. Justification must cover ---

(a) DAC (ARNG or USAR) or TFIO memorandum stating (1) all course critical tasks will be trained to the Total Army to the same standard under the proposed course design; (2) justification for selection of different media for AC/RC training, to include cost associated with development of different media and life cycle management/maintenance of training product currency; and (3) reasons why multimedia and DL cannot be used to reduce resident training.

(b) Agency coordination sheets and documentation summarizing non-resolution of Reserve Component issues.

TATS Training Year

h. A TATS Training Year is a training year that meets both the requirements and constraints, to include equipment and time, of the Total Army. Reserve Components are generally limited to 323 academic hours during a “training year” consisting of Annual Training (AT)/Active Duty for Training (ADT); IDT; and non-resident, self-paced DL.

(1) The following table depicts a TATS Training Year.

(a) **AT/ADT**	(b) **IDT**
1 Provides a total of 14 (USAR)/15(ARNG) training days, designated by Congress, that includes time for --- a Travel. b Administrative requirements. c Training. d Physical training (PT). 2 Allows only 12 days for actual training. a In general, training efficiency limits actual training time to a maximum of 120 hours (10 hours per day). b Training time can be extended to 134 hours with training exercises, e.g., a 24 hour field training exercise. 3 May involve use of DL modules.	1 Consists of forty eight (48) four (4) hour sessions (192 hours). Each 4 hour session is called a Unit Training Assembly (UTA). Four UTAs are usually combined into a Multiple Unit Training Assembly (MUTA4), another name for the one weekend a month RC soldiers assemble for training. 2 Allows the training developer to use only128 hours of the 192 hours for training because of mandatory unit training/work and administrative requirements. 3 Allows 4 hours of administrative time during the first TASS Training Battalion IDT class. 4 Uses IDT periods, in general, to provide training prior to AT/ADT on knowledge as well as tasks and skills not dependent on equipment. a IMI use in IDT is dependent upon availability of computers and software. b Although future applications of resident DL may be trained during Captains Career Course IDT, current constraints dictate that resident DL for Branch Phases of Captains Career Course will not be developed for IDT. 5 May involve use of DL modules.
(c) **Distance Learning:** DL can be accomplished during --- a **Resident** AT/ADT or IDT. b **Non-resident,** remote, self-paced training (outside of formal AT/ADT, or IDT). As a general rule, **non-resident DL for enlisted reclassification is limited to a total of 75 hours** during a TATS Training Year. Annual limit of 75 hours distance learning is waived for Captains Career Course. Other exceptions are possible upon USARC and NGB approval.	

TATS Training Year

(Continued)

(2) **Requests for Exception to TATS Training Year.** Courses which exceed this period require a special "exception" from HQ, TRADOC. Training/Task (TD) proponents will forward the following to DCSED:

(a) Notification of those courses for which they received NGB and USARC concurrence. Include Proposed TATS Course Structure as well as agency (NGB and USARC) coordination sheets and documentation showing Reserve Component concurrence and resolution of issues.

(b) Requests for exception to TATS Training Year for courses for which they could **not** reach resolution. Requests for exceptions must include a Proposed TATS Course Structure and full justification for the exception to policy. Justification must cover ---

1 DAC (ARNG or USAR) or TFIO memorandum stating (1) all course critical tasks will be trained to the Total Army to the same standard under the proposed course design, (2) if applicable, justification for selection of different media for

AC/RC training, to include cost associated with development of different media and life cycle management/maintenance of training product currency; and (3) reasons why multimedia and DL cannot be used to reduce resident training.

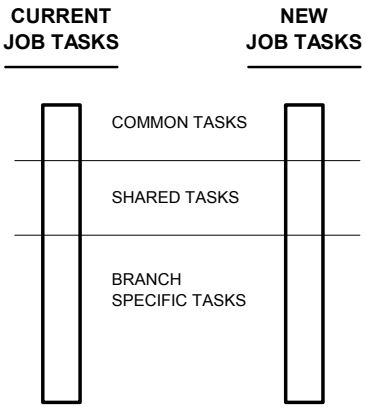
2 Agency coordination sheets and documentation summarizing non-resolution of Reserve Component issues.

Reclassification Training

i. Design courses into modules to allow for training of those tasks needed for job reclassification only (usually required branch-specific as well as shared task training) within one TATS Training Year. Properly developed modules will lend themselves to reclassification training within a given CMF as well as across CMFs. The most efficient and effective way to design reclassification training is to first prepare a task list specific for the soldier(s) being reclassified in order to identify the actual tasks to train. To prepare this task list:

(1) Compare critical task lists for the soldier's current job and the job to be trained.

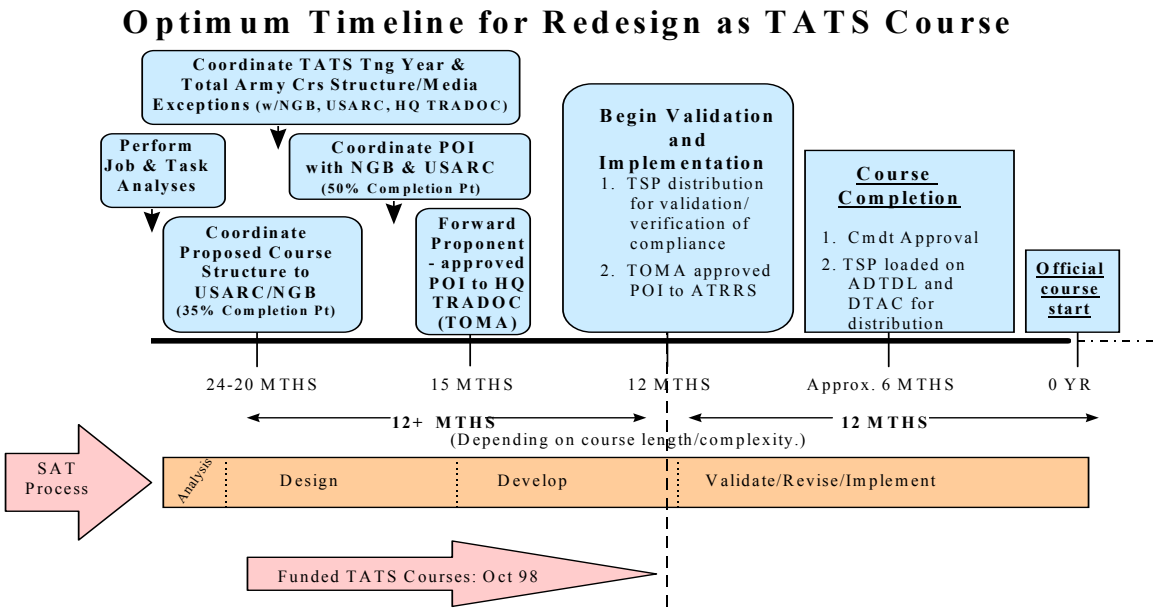
(2) Eliminate the tasks the soldier has already been trained to perform from the new job task list. This includes –
   (a) Common soldier tasks.
   (b) Common skill level tasks.
   (c) Shared Combat Arms (CA), Combat Support (CS), Combat Service Support (CSS) tasks.
   (d) Shared branch tasks.



(3) Then design training to train the remaining tasks (basically MOS/AOC-specific and shared tasks as needed).
   (a) Consider DL for reclassification training. If IMI is used in resident IET, these lessons should be designed so they may be useable for distance learning of reclassification training.
   (b) If desired, further define training requirements by comparing the skills and knowledge for the remaining tasks and eliminate the skill/knowledge training on which the soldier has already received training. Individual self-paced training using CBI has the capability to provide this training.
   (c) Structure a course with tracks to facilitate this training.

Optimum Timeline

j. The following graph depicts an optimum timeline for a TATS Course redesign.



Note: For a **new** TATS Course due to development of a new materiel system, the above timeline would reflect 5-year IPT and 3-year CAD actions.

TR 350-70, para VI-7-2. Administrative Information Purpose.

a. Tests are used for evaluating individual training in resident and extension training. Their purpose is to ---

(1) Esure students can accomplish or have learned what they were supposed to accomplish or learn.

(2)Ensure students are qualified prior to ---

(a) Commencement of training (ensure prerequisites are met).

(b) Progression to the next training level, phase, etc.

(c)Graduation from the training.

(d) Award of a Military Occupational Specialty (MOS), Additional Skill Identifier (ASI), Area of Concentration (AOC), Language Identifier Code (LIC), etc.

(3)Accurately assess student achievement against established, preset standards (criterion referenced testing).

(4)Improve training by ---

(a) Validating the effectiveness of training.

(b) Identifying areas within training that needs improvement.

(c) Motivating, challenging, and encouraging students to learn.

(5) Confirm or certify as appropriate that the student is competent in the job (can

perform tasks to established, preset standards).

(6) Focus training where it is needed and save training time and resources by ---

(a) Providing a means to test-out of portions of or all of a course.

(b) Enabling unit training to concentrate on identified soldier performance deficiency(ies).

(c) Enabling an individual to concentrate on personal performance deficiency(ies) for self-development purposes.

(7) Assist in determining training effectiveness.

(8) Assist in determining if training teaches what it is supposed to teach.

TR 350-70, VI-8.

Chapter VI-8
Training Course Development

VI-8-1. Chapter Overview

Introduction

a. This chapter provides policy, guidance, and a top-level view of the development of training courses; training support packages (TSPs); and lessons used in subcourses, video teletraining (VTT), and Interactive Multimedia Instruction (IMI).

Note 1: See Chapter VI-6, Training Course Design, for Total Army Training System (TATS) Course development timeline as well as training course design requirements, e.g., lesson plan and TATS Course design.

Note 2: See Chapters VI-9, Army Correspondence Course Program (ACCP) and VII-3, VTT Program, for further development guidance on respective products.

Note 3: See Chapter VI-3, Individual Task Management: Common, Shared, and Branch, for Common Core TSP development policy.

Chapter Index

b. This chapter covers the following:

Content	Paragraph
Administrative Information	VI-8-2
Training Course Development Description and Requirements	VI-8-3
Total Army Training System (TATS) Course Development Requirements	VI-8-4
Lesson/Lesson Plan Development	VI-8-5
Warrior Training Support Package (TSP): Development and Submission for Individual Training	VI-8-6
Total Army School System (TASS) Battalion Training	VI-8-7

Reserve Component Course Configuration (RC3) Program Description and Requirements	VI-8-8
Course Management Plan (CMP)	VI-8-9

VI-8-2. Administrative Information

Purpose

a. During the development phase of the Systems Approach to Training, the design output is expanded into the products/materials used to implement the training. The training materials required to present formal training are written, reproduced, and distributed. Resources required to implement the training are acquired, and the staff is trained to implement the training. This development process applies to all types of courses, media and materials used in a training course.

Examples:
- Training Course development, including TATS and distance learning courseware.
- Training Support Packages.
- IMI.

References

b. Required references and Internet addresses are as follows:

Regulatory:

(1) AR 351-1, Individual Military Education and Training.
(2) TR 351-18 Total Army School System (TASS).
(3) Other chapters, this regulation:
(a) Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials.
(b) Chapter II-8, Training Requirements Analysis System (TRAS).
(c) Chapter II-9, Distance Learning.
(d) Chapter III-1, Evaluation and Quality Assurance Program Description and Requirements.
(e) Chapter III-3, Product/Material Validation
(f) Chapter V-7, Training Support Package (TSP) Development for Collective/Warfighter (WF) and Warfighter Modernization (WarMod)/Army Modernization Training (AMT).
(g) Chapter VI-3, Individual Task Management: Common, Shared, and Branch.
(h) Chapter VI-6, Training Course Design.
(i) Chapter VI-9, Army Correspondence Course Program (ACCP).
(j) Chapter VII-3, Video Teletraining (VTT) Program.
(k) Appendix E, Lesson Plan, Training Support Package (TSP), and Course Management Plan (CMP) Formats and Components.
(l) Appendix K, TATS Course Checklist.

Standard 1 Reference Excerpts

Procedural: TATS Course Handbook 350-70-TATS.

Internet:

(1) Army Doctrine and Training Digital Library:
http://www.adtdl.army.mil
(2) TRADOC Technical Media Standards:
http://www.atsc.army.mil/dld/standard.htm

Definitions c. See Glossary for training development (TD)-related terms. Terms specific to this chapter:

TATS Course. It is a single course designed to train the same military occupational specialty (MOS)/area of concentration (AOC) skill level, Skill Qualification Identifier (SQI), additional skill identifier (ASI), Language Identifier Code (LIC), and Skill Identifier (SI) within the Total Army. It also includes MOS Qualification (MOSQ, i.e., reclassification), Army leadership, functional, professional development, and civilian courses. The course's Total Army structure (phases, modules, tracks, lessons, tests) and media ensure standardization by training all soldiers (regardless of component) on course critical tasks to task performance standard. Course lengths, but not academic hours, may vary due to such differences as Active and Reserve Component (AC/RC) training day lengths.

TSP. A complete, exportable package integrating training products, materials, and/or information necessary to train one or more critical tasks. Its contents will vary depending on the training site and user. A TSP for individual training is a complete, exportable package integrating training products/materials necessary to train one or more critical individual tasks. A TSP for collective training is a package that can be used to train critical collective and supporting critical individual tasks (including leader and battle staff).

Validation. Validation is the process used to determine if new/revised courses and training products/materials accomplish their intended purpose efficiently and effectively. It is the process used to determine if training accomplishes its intended purpose. Validation and revising training are continuous actions in the teaching/revising process of training improvement. Validation of products and materials involves ---

(1) Verification of their training effectiveness in training the objective.
(2) Determination of beneficial improvements in the quality of training products and materials.
(3) Identification of training product deficiencies
(4) Improvement of efficiency, effectiveness, and utility of training objectives, structure, sequence, products, and materials. In the "testing" context, it is the process of determining the degree of validity of a measuring instrument (e.g., skill qualification, end-of-module, and end-of-course comprehensive tests).

Note: Validation is of the training products themselves, **not** the training site.

Responsibilities

d. See Appendix B, Responsibilities, for top-level responsibilities. Those responsibilities that specifically pertain to training course development are as follows:

Activity	Responsibilities
(1) HQ TRADOC, Deputy Chief of Staff for Training (DCST) and Deputy Chief of Staff for Education (DCSED)	(a) Develops training/TATS Course development policy, to include lesson plans and TSPs. (Training Development Analysis Activity [DCST, TDAA]) (b) Serves as proponent and develops policy for the maintenance of RC3 Courseware until replacement by TATS Courses. (DCST, Individual Training Directorate [ITD]) (c) Develops and manages Memoranda of Agreement (MOAs) as required for TATS Course as well as DL modules under TRADOC Multimedia Contract development. (DCST, TDAA) (d) Manages DA and DCST Key Enabling Investment (KEI) funding for TATS Course development. (DCST, TDAA) (e) Provides guidance to ATSC on contractual aspects of TATS Course design/development. (DCST, TDAA) (f) Resolves USARC and NBG validation nonconcurrence issues as requested by proponent school. (DCSED)

(2) Commander, Army Training Support Center (ATSC)	(a) Updates and publishes annually (by end of 2nd QTR each fiscal year) TRADOC Technical Media Standards used for developing TATS courseware and products published in the Army Doctrine and Training Digital Library (ADTDL). (b) Assists, as required, proponent schools in writing statements of work (SOWs) for TATS Course as well as DL modules under TRADOC Multimedia Contract development. (c) Provides guidance as requested by Training/Task (TD) Proponents in the development of exportable TATS Courses and RC3 courseware errata sheets. (d) Manages for the DCST the replication and distribution of training products/materials for TASS Training Battalions to meet training start date requirements as required. (e) Manages common core TSP development; coordinates shared task TSP development. (f) Manages for the DCST the reproduction and distribution of common/shared task training products. 1 Coordinates and schedules delivery and publication. 2 Replicates, stores and distributes products. 3 Uploads approved product(s) into the ADTDL. (g) Ensures correct format, TSP completeness (all required components), and product compliance with automation standards of for TATS Course and common task TSPs prior to upload into the ADTDL (or installation DTAC upon standup). (h) Until standup of installation Digital Training Access Centers (DTACs), uploads approved TATS Courses into the ADTDL; after DTAC standup, uploads approved TATS Courses name to the ADTDL course list.
(3) Commanders/ Commandants Training/TD (Task) Proponents	(a) Staff MOAs as required for TATS Course and DL module development as required. (b) Obtain 06 or general officer signature on TATS Course MOAs as appropriate. (c) Develop SOWs for TATS Course and DL module development as required.

(3) Commanders/ Commandants Training/TD (Task) Proponents (continued)	(d) Ensure training courseware development/revision is entered into the workload management database (currently the Automated Systems Approach to Training [ASAT], Resource Management menu option). (e) For TATS Courses, coordinate with **National Guard Bureau (NGB)**, Training Division, and **Headquarters, U.S. Army Reserve Command (USARC)**, Individual Training, **through the Deputy Assistant Commandant (DAC) (ARNG or USAR) or Total Force Integration Officer (TFIO)**: 1 **For SME support** from functionally aligned TASS Training Battalions: a Revised job and task analyses. b Course design and development. c Courseware validation. ***Note:*** "Distance TD" is a possibility to avoid travel costs. 2 **For concurrence**: a Proposed TATS Course Structure (including Common Core) and supporting narrative. b TATS Course POI. ***Note:*** Maintain agency coordination sheets and documentation summarizing resolution/non-resolution of Proposed TATS Course Structure, POI, and validation issues. Final course documentation forwarded to HQ TRADOC (DCST, Training Operations Management Activity [TOMA]) will contain copies of coordination results. (f) Develop --- 1 Training course products/materials using the analysis data and design output. 2 A TSP/lesson plan for critical common and shared tasks for which they are the training proponent, using the format provided in Appendix E, Lesson Plan, TSPs, and CMP Formats and Components, and IAW HQ TRADOC-provided procedural guidance. 3 A TATS Course using Total Army Course Structure/ Media to ensure training of all soldiers to perform to task performance standard (unless DCST grants exception.) 4 DL lessons/modules IAW Chapter II-9, DL. 5 Courseware IAW: a TRADOC Technical Media Standards. b Copyright requirements in Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/Proprietary Materials. 6 Courseware in the structured writing format when feasible. (g) Identify and minimize training risks, to include --- 1 Guidance to minimize adverse environmental impact while maintaining realistic training. 2 Safety and environment considerations in all courses. (h) **Will not** modify the TSP or lesson plan structured writing format included in Appendix E without approval from DCST, TDAA. Approval will not be granted without compelling justification. Previous exemptions are invalid.

(3) Commanders/ Commandants Training/TD (Task) Proponents (continued)	(i) Apply appropriate classification markings as well as FD restriction statements to each TSP/lesson/lesson plan containing classified military information (CMI) and controlled unclassified information(CUI) IAW Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/Proprietary Materials. (j) Submits common task and TATS Course TSPs to ATSC for compliance with automation standards prior to upload into the ADTDL. (k) Submit shared and common task TSPs to ATSC for reproduction and distribution IAW HQ TRADOC (DCST, ITD) milestones. (See Chapter VI-3, Individual Task Management: Common, Shared, and Branch.) (l) Validate training courses with target audience. For TATS Courses, coordinate with NGB and USARC **through the DAC (ARNG or USAR) or TFIO** for SME support. (m) Approve proponent-developed courses and courseware, to include Common/Shared Task TSPs, Training/TATS Course TSPs (and components there of), as well as training products that are not part of an approved course. ***Note 1:*** Commander/Commandant approves TATS Courses upon recommendation of DAC (ARNG or USAR) or TFIO. ***Note 2:*** Approval follows --- • Validation. • ATSC verification of compliance for format, completeness, and TRADOC Technical Media Standards. (n) Ensure training products, literature, and materials containing sensitive but unclassified (SBU), CUI, and copyrighted information are properly identified and have the appropriate lock-outs before uploading on the internet or DTAC. (o) Use the TATS Course Checklist (Appendix K) before forwarding TATS Course TSPs to ATSC for upload on the ADTDL or before uploading onto the installation DTAC. (p) Upload approved TSPs, training courses, and course materials on the installation DTAC upon standup; until DTAC standup, forward approved TATS Course TSP to ATSC for upload into the ADTDL. (q) Maintain currency of all training courses and TSPs, including all components thereof. (r) Ensure availability of current training products and material for access by all training sites. (s) Develop TATS Courses to replace RC3 TSPs for

VI-8-3. Training Course Development Description and Requirements

Description a. Course development is the process used to convert the course design into the
training products and materials required to implement the course. The lesson outline is the basic building block of all training. It may be completed as a lesson plan for formal institutional training or as a lesson in a correspondence course or distance learning product. A training course consists of ---

(1) Common/Shared Task TSPs (as appropriate).
(2) Lessons (instructor-led or self-paced, e.g., IMI).
(3) Tests.
(4) Student Handouts.
(5) Supporting products, including audiovisual media products, e.g., video tapes, audio tapes, photographs, etc.

Outputs b. **Minimum essential requirements** for training course development are as follows: (1) Validated, approved training courses and course materials, such as ---

(a) TSPs.
(b) Detailed lessons and lesson plans.
(c) Final, ready-to-use media products, e.g., photographs, 35mm slides, videotape, maps, etc.
(d) Criterion-referenced performance tests.
(e) Practical exercise/laboratory assignment sheets.
(f) Home study assignment sheets.
(g) Study guides.
(h) Student workbook.
(i) Information sheets.
(j) CMP.

(2) Validated, approved subcourses/modules or correspondence courses.
(3) Trained instructors/facilitators/staff in instructional and implementation procedures as appropriate to method/type of instruction and media.

Start Point c. Training courses, TSPs, as well as subcourse, VTT, and IMI lessons can be developed to support new jobs or revised as necessary.

(1) **New:** Training course, TSP, and lesson development begins with receipt of training course design outputs.
(2) **Revised:** Minor training course, TSP, and lesson revisions occur as necessary to ensure current and correct course material. Revisions may also be the result of a formal needs analysis or a completely revised course, e.g., for TATS Courses.

Note 1: A course is considered obsolete and in need of major revisions when over 30% of course lessons require revision. Also, these lesson revisions would result due to task performance changes that threaten survivability/mission accomplishment or that result in a major environmental or safety impact.

Note 2: Design and development are **normally accomplished sequentially.** They can sometimes be accomplished **simultaneously** or **concurrently** to save production time. This is especially true when producing a small stand-alone training product, such as a TSP for a single common task.

Procedures d. Developing a training course involves converting the training course design into the material required to implement the course. The general course training development steps are as follows:

Step	Action
(1)	Maintain the design/development team.
(2) (3)	Acquire and study the task analysis and training design data. Obtain instructor contact hours (ICH) (i.e., instructor requirements) validation from TRADOC Management Activity (TMA).
(4)	Complete the lesson plan or lesson, i.e., fill in the lesson outline (design output) with all the details required to implement the instruction. ***Note:*** See Chapter VI-6 for lesson outline guidance and Appendix E for lesson plan format (this regulation).
(5)	Write the student handout and assignment materials. ***Examples:*** • Information sheet. • Student workbook. • Study guide.
(6)	Complete production of any required IMI and audiovisual media products. ***Note:*** Visual Information Specialists and audiovisual production personnel may be involved in this action.
(7)	Produce instructor-required media. ***Examples:*** • Overhead transparencies. • Graphic Training Aids. • 35mm slides.
(8)	Compile tests.
(9)	Validate training products/materials.
(10)	Obtain school commander/commandant approval. For TATS Courses, commander/commandant approval is at the recommendation of the Deputy Assistant Commandant (ARNG or USAR) or Total Force Integration Officer.
(11)	Acquire required training resources.

(12)	Train the instructors/facilitators/staff in instructional and implementation procedures as appropriate to method/type of instruction and media.

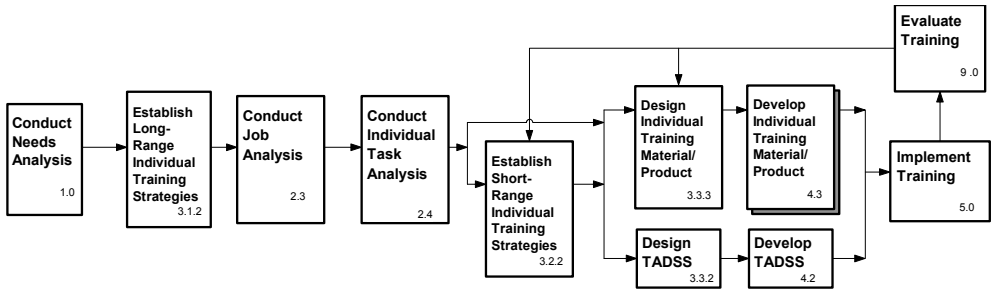
Process Completion (All Training Courses and Supporting Products)

e. Development is completed when the appropriate proponent command authority approves all training courses and supporting products for implementation. For detailed guidance, see "Total Army Training System (TATS) Course Development Requirements," "Lesson/Lesson Plan Development," "Warrior TSP: TSP Development for Individual Training"; and "Course Management Plan (CMP)" completion requirements in this chapter.

Note: Until standup of Digital Training Access Centers (DTACs), ATSC uploads approved TATS Courses and supporting products into the ADTDL. Upon standup of DTAC, proponent uploads the products into the DTAC. Proponent is responsible for maintaining currency of training course products.

Process Flow

f. The relationship between development and other TD phases is as follows:



Quality Control

g. For quality developed course products/materials, each involved individual must ensure ---

(1) Development is consistent with the analysis data and design outputs.

(2) Products are in compliance with TRADOC Technical Media Standards.

(3) Products are in compliance copyright requirements in Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/Proprietary Materials.

(4) Products meet format requirements in this regulation.

(5) Each test and test item meets testing standards. See Chapter VI-7, Student Performance Measurement/Testing.

(6) Content is doctrinally and technically accurate.

(7) Safety, risk, and environmental factors and considerations are incorporated.

(8) Deficiencies are identified and corrected.

VI-8-4. Total Army Training System (TATS) Course Development Requirements

Introduction

a. This paragraph provides training course policy and guidance specific to TATS Course development.

Note 1: Initial TATS Course redesign focuses on existing comparable AC and RC courses that are being redesigned as a single course meeting the training needs of the Total Army.

Note 2: Officer Basic Courses (OBCs) and Warrant Officer Basic Courses (WOBCs) as well as initial entry and initial active duty training (IET/IADT) (which includes Basic Combat Training [BCT], Advanced Individual Training [AIT], and one-station unit training [OSUT]) are considered TATS Courses as they are "one-of-a-kind" courses attended by AC/RC soldiers at the same applicable AC training sites.

Note 3: See Chapter VI-6 for exceptions to TATS Course design requirements: TATS Training Year and Total Army Course Structure/Media.

Use

b. As TATS courses can consist of one or more phases, modules, and media,
they can be used in a number of training sites. Training proponent schools and TASS Training Battalions manage the training of TATS Courses. Validated modules/media within TATS Courses can be used by the soldier in his unit, home, or TASS Training Battalion.

TSPs Contents

c. A TATS Course TSP can contain a variety of components, depending on the user of the particular modules. See "Training Support Package (TSP) Development for Individual Training" (this chapter) and Appendix E.

TATS Course Management

d. Manage TATS Course ---

(1) Resourcing through the proponent school Command Operating Budget (COB). See Chapter II-2, TD Workload and Resource Management. Proponents may apply to the DCST (ATTG-CF) for available distance learning resources.

(2) TRAS documentation IAW Chapter II-8, TRAS.

(3) Revision/Development in the automated TD workload management database (currently the Automated Systems Approach to Training [ASAT], Resource Management menu) IAW Chapter II-2, TD Workload and Resource Management.

Note: See other TATS Course management functions in Chapter VI-6, Training Course Design, "TATS Course Design Requirements."

Development/ Requirements

e. TATS courses are developed ---

(1) For new course requirements and for replacement of existing AC/RC3 courses.

Note: Proponents should continue minor revisions to existing AC and RC3 courses using errata sheets.

(2) Based on TATS Course design, considering reclassification training requirements, resource constraints, and RC training and equipment constraints.

Note: See Chapter VI-6, Training Course Design, "TATS Course Design Requirements."

(3) Within a TATS Training Year and using a Total Army Course (phases, modules, tracks, lessons, tests) and media to ensure training of all soldiers to perform to task performance standard unless exception is granted by the DCST. See Chapter VI-6, Training Course Design, "TATS Course Design Requirements."

(4) Following procedures in the following paragraphs, this chapter: "Training Course Development Description and Requirements," "Lesson/Lesson Plan Development," and "TSP Development and Submission for Individual Training."

(5) Continuing to coordinate fully during development.

(6) Accessing ---

(a) Reserve Component assets, i.e., Title 10 (coordinate with Director, Army National Guard Bureau/Chief, Army Reserve) or Title 32 (coordinate with state adjutant general and NGB), for TD support of TATS Courses.

(b) Title 11 assets.

(7) Leveraging distance learning IAW Chapter II-9, Distance Learning.

(8) Maximizing use of technologies:

(a) Exploit existing technological support infrastructure (hardware/software).

(b) Program resources to build future technological infrastructure required.

(c) Invest in digitization as spring board to full multimedia.

Validation

f. Chapter II-8, Training Requirements Analysis System, provides policy for TRADOC Manpower Agency validation of training courses. Policy for validation of a TATS Course as a product is in Chapter VIII-3, Product/Material Validation. This validation of the redesigned TATS Course determines its suitability and supportability of both AC and RC unique requirements. Resident course validation may be conducted during the first three iterations to save time and resources. However, non-resident DL modules must be validated prior to reproduction and distribution. Discrepancies must be thoroughly coordinated and resolved with all concerned parties/audiences prior to full implementation. Proponents are responsible for validation of all TATS courseware as follows:

(1) Coordinate courseware validation and validation results within the proponent school.

(2) Coordinate with **NGB**, Training Division, and **USARC**, Individual Training, **through the DAC (ARNG or USAR) or TFIO for SME support**. TASS SMEs will support validation of the course, to include specific tracks relevant to the target audience, e.g., equipment fielding.

(3) Ensure training can be accomplished within the TATS Training Year (unless exception was granted IAW Chapter VI-6); courseware meets Total Army Course Structure/Media requirements (unless exception was granted IAW Chapter VI-6); courseware includes training on critical tasks for the job being trained only; and courseware is useable by target audience at all training sites.

(4) Resolve NGB and USARC issues concerning validation results; forward unresolved issues to DCSED through DCST, TDAA.

Note1 : USARC and NGB may extend course start date due to validation constraints or issues.

Note 2: Validation is of the training products themselves, **not** the training site.

TATS Course Completion

g. The TATS Course is complete following validation upon approval of the school commander/commandant at the recommendation of the Deputy Assistant Commandant (ARNG or USAR) or Total Force Integration Officer, as appropriate, and subsequent fielding of courseware. See more details in "Warrior Training Support Package (TSP): TSP Development and Submission for Individual Training," this chapter.

Quality Control

h. For quality training, the personnel involved must ensure ---

(1) TATS courseware ---

(a) Is the most effective and efficient means for training the critical tasks, as determined by the individual training design process.

(b) Trains all course critical tasks to standard, regardless of the media/method used.

(c) Is validated by the target audience during the design and development processes, i.e., do not wait for fielding of entire course. This will ensure hardware requirements are available to using units before development of the courseware is too advanced.

(2) TATS TSPs are complete (contain all components and courseware) before forwarding for reproduction or distribution.

(3) TATS Courses meet TATS Training Year and Total Army Course Structure/Media requirements or have approved exceptions to policy.

(4) TATS Course TRAS documents have been submitted in a timely manner.

VI-8-5. Lesson/Lesson Plan Development

Description

a. The lesson outline is the basic building block of all training. It is designed to facilitate learning and includes all the details required for the presentation. A lesson outline (described in Chapter VI-6, Training Course Design) may be completed to become an instructor or SGI-

presented lesson plan or a self-paced lesson, such as a lesson in a correspondence course or IMI lesson.

If the instruction is to be ---	Then develop a ---
(1) Presented by an instructor for formal institutional training	Lesson plan. The developer adds as much detail as needed to allow any new instructor to use this lesson plan with no degradation of training and with minimum preparation time. Additionally, the media products for instructor use are produced. ***Note:*** IMI facilitated by the instructor requires a lesson plan.
(2) Used directly by the student	Self-paced lesson (e.g., lesson for correspondence course, programmed text, or IMI) so the student can meet the learning objective standard without the assistance of an on-site instructor.

Note: A stand-alone lesson may be **designed and developed simultaneously** if it is not designed to build on or reinforce previous training. A lesson, as an integral part of a course, must be designed first, then developed to ensure sequential, progressive training.

Outputs

b. The primary lesson/lesson plan development outputs are ---
- (1) Approved self-paced lesson and supporting media/materials for student use, e.g., correspondence course, IMI.
- (2) Approved lesson plan(s) for instructor/course manager use.
- (3) Home study and other student assignments ready for issue to the students in support of instructor-led instruction.
  - (a) Practical assignment sheets.
  - (b) Student handouts.
  - (c) Home study assignments.
- (4) Media training products ready for use in the training course, e.g., 35mm slides, overhead transparencies, video tape.
- (5) Criterion tests and practical exercise guidance.

Standard Format

c. The lesson plan format has been standardized. Student self-paced lessons, usually CBI, are not standardized but must follow the lesson outline (see Chapter VI-6, Training Course Design, "Lesson Outline").
- (1) Use the standardized lesson plan format in Appendix E.
- (2) Use the HQ TRADOC TD automation system (currently ASAT) to develop the lesson plan.

Note: Proponents requesting exceptions to lesson plan format for development of new lessons must receive DCST, TDAA approval; permission previously granted is no longer valid. For resource

conservation, lesson plans should not be modified to the new format until course redesign requires new lessons.

Standard Lesson Number

d. The standardized Lesson Number (i.e., POI File Number) is as follows:

n n n n - n n n n n n n n	**n n n n** = Proponent School Code **n n n n n n n n** = ***Numeric*** characters to uniquely ID lesson.

Note: Do not add a "0" to fill in the fourth space. If your code has 3 numbers, use 3 via the ASAT pick list only.

Start Point

e. Lesson/lesson plan development starts with the receipt of the lesson outline. See Chapter VI-6-9, Training Course Design, "Lesson Outline."

Lesson/ Lesson Plan Procedure

f. Follow the procedure below when developing a lesson and a lesson plan. All the steps apply to lesson and lesson plan development unless specified.

Step	Action
(1)	Acquire the lesson outlines.
(2)	Acquire the task analysis data for the tasks and/or supporting skills and knowledge to be trained in the lesson being developed.
(3)	Write the contents of the learning steps/activities --- (a) To support learning to accomplish the learning objective. (b) That are absolutely required to accomplish the learning activity. (c) With sufficient detail that the user can accomplish the learning objectives.

If writing a ---	**Then ---**
1 Lesson plan	A new or substitute instructor must be able to present the material without degradation of training and with minimum preparation time.
2 Lesson	The student must be able to learn the material without the assistance of an on-site instructor.

Note 1: The detail required depends on the teaching situation. If a ---

- Lesson plan is designed and developed by one team and presented at a number of locations, the detail must be relatively extensive. A lesson plan can have less detail if presented by the design/development team.

Lesson/ Lesson Plan Procedure (continued)

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>(3)</td><td colspan="2">Note 1: (continued)
• Lesson is designed and developed as a paper product, it must be relatively extensive. It may reference other documents, such as a technical manual or field manual.
Note 2: The degree of technical difficulty will also affect the detail required. Technical manuals, such as those used in aviation maintenance, should not be duplicated; refer to specific TM paragraphs as appropriate.
(d) List the detailed information in teaching sequence order.
(e) Use paragraphs (optional).</td></tr>
<tr><td>(4)</td><td>For a lesson plan</td><td>Where appropriate, write "NOTES:" to provide necessary instructor information or actions. Include as many "NOTES" as needed to provide adequate "how-to" information for a substitute instructor. Place the "NOTE:" as a separate paragraph in the lesson body where the event should take place.</td></tr>
<tr><td>(5)</td><td colspan="2">Write a short motivator that ---
(a) Provides relevance and significance to the lesson.
(b) Gains student interest and focuses them on what they are about to learn.
(c) Explains why the student needs to perform the learning objective and what the consequence of nonperformance is.
(d) Explains the actual job or battlefield conditions that would make learning the TLO essential for the student.</td></tr>
<tr><td>(6)</td><td colspan="2">Provide details of what the student is to learn from any instructional medium (e.g., video tape, audio tape) to be used during the lesson.</td></tr>
<tr><td>(7)</td><td colspan="2">Add (in bold type) cautions, warnings, and danger notices as appropriate. Check with the safety officer for current terminology.
<table>
<tr><td>CAUTION</td><td>Notice should alert users to the possibility of personal injury or damage to equipment that may result from long-term failure to follow correct procedures.</td></tr>
<tr><td>WARNING</td><td>Notice should alert users to the possibility of immediate personal injury or damage to equipment.</td></tr>
<tr><td>DANGER</td><td>Notice should alert users to the possibility of immediate death or permanent injury. Although damage to equipment may occur, the major concern is the probability of death or permanent injury if the warning is ignored.</td></tr>
</table></td></tr>
</table>

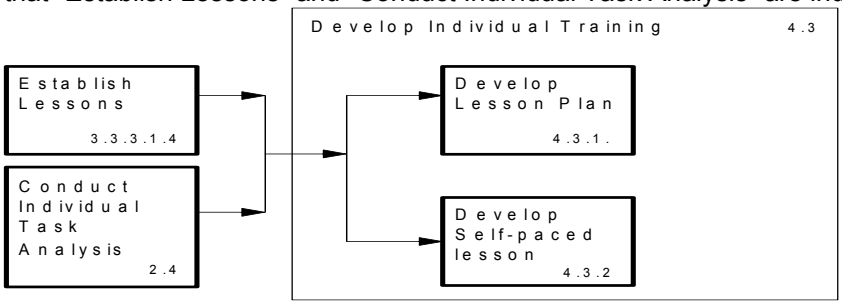
(8)	**For a ---**	**Then ---**
	Lesson plan	Write details for "Check on Learning" as appropriate.
	Self-paced lesson	1 Build in "Check on Learning" as appropriate. 2 Provide remedial training for incorrect responses to "Check on Learning" questions/exercises.
	Note: A "Check on Learning" is an informal, required check to determine if students are learning. It can be as simple as asking one or two review questions or as complex as asking students to demonstrate skill performance.	
(9)	**For a ---**	**Then ---**
	(a) Lesson plan	1 Write a full description of the test, details on how the student will perform the test, special requirements, and grading criteria. 2 Provide remedial training for incorrect responses to test questions/exercises.
	(b) Self-paced lesson	Build in --- 1 Tests IAW with the design. 2 Remedial training for incorrect responses to test questions/exercises.
	Note: See Chapter VI-7, Student Performance Measurement/Testing.	
(10)	Comply with copyright requirements and apply appropriate classification markings as well as appropriate foreign disclosure (FD) restriction statements to TSP and lessons/lesson plans IAW Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials.	
(11)	Obtain appropriate command authority approval.	

Lesson Completion

g. The lesson/lesson plan development is considered complete when approved by the appropriate command authority.

Process Flow

h. General information flow for lesson/lesson plan development is as follows. Note that "Establish Lessons" and "Conduct Individual Task Analysis" are independent actions.



Quality Control

i. For a quality lesson/lesson plan, each involved individual must ensure ---
(1) Development is consistent with the training design and analysis data.
(2) Technical accuracy of content.

(3) Training is feasible, cost-effective, sequential, and progressive.
(4) Learning sequence is effective.
(5) Identification and correction of deficiencies.
(6) Incorporation of safety, risk, and environmental factors and considerations.

VI-8-6. Warrior Training Support Package (TSP): Development and Submission for Individual Training

Description a. A TSP for individual training is a complete, exportable package integrating training products/materials necessary to train one or more critical individual tasks. It could be a package for an entire course or for a single task and can be trained at training site(s) other than the development location. These sites could be an AC school, a TASS Training Battalion, a unit, or a distance learning site/an individual's home.

Note 1: See Chapter V-7, TSP Development for Collective and WarMod/AMT, for further information on specific types of collective TSPs.

Note 2: See Chapter VI-3, Individual Task Management: Common, Shared, and Branch, for Common/Shared Task TSP development, management, and distribution.

Note 3: See Appendix E, Lesson Plan, TSP, and CMP Formats and Components, for Common/Shared and Training/TATS Course TSP formats and components.

Outputs b. Warrior TSPs are a **minimum essential requirement** if identified as a requirement during needs analysis or short-range individual training strategy. The primary individual TSP development output is an approved, validated TSP containing all the material required to implement the training at the training site. Its contents will vary depending on its type/use.

TSP Uses c. The term "Warrior TSP" denotes the concept of future, computer-generated TSPs for individual training. A Warrior TSP is a package of training products/materials necessary to train one or more critical individual tasks anywhere in the world, to include in the institution, at the unit, or in a soldier's home. Training may be conducted using formal instruction, self study, or distance learning in a live, virtual, or constructive environment. Its automated components allow access of critical individual (including leader and battle staff) task specifications in support of Warfighter and Warfighter Modernization (WarMod) TSPs.

(1) Definitions and components of existing TSPs used for individual training to be automated in the future in support of Warrior XXI are as follows:

Standard 1 Reference Excerpts

Uses	Definitions and Components
(a) Common or shared individual task TSP	A TSP for one or more common or shared tasks. It --- 1 Includes --- a Administrative information/Instructor guidance. b Lesson plan or plans. c Instructor-used media. d Training map (mandatory training sequence - if multiple lessons). 2 Can be used for presenting programmed, refresher, or integrated training. ***Note:*** See Chapter VI-3, Individual Task Management: Common, Shared, and Branch
(b) TSP for individual task trained in unit	A TSP prepared by the proponent school for a critical individual task selected during the media selection process for training at the unit. It contains all guidance/material needed to train the task, to include --- 1 Administrative information. 2 Trainer guidance. 3 Training materials.
(c) RC3 TSP	A package of course training material configured (redesigned) from AC resident courses. TATS Course TSPs will replace RC3 TSPs.
(d) Training/ TATS Course TSP	Contains all guidance and materials needed to train all critical tasks of a particular course to the Total Army. ***Note:*** See Appendix E, Lesson Plan, TSP, and CMP Formats and Components.
(e) TADSS TSP	A complete package integrating all training products/materials necessary to train one or more individuals in the operational use and/or maintenance of a TADSS. See Chapter V-7, TSP Development for Collective and WarMod/AMT, for TADSS TSP components and requirements.
(f) Awareness Training TSP	Contains all the materials and guidance required to implement the awareness training. This package may include --- 1 Formal lesson material. 2 Supplemental reading. 3 Audiovisual material (video tape, overhead slides, etc.). 4 Administrative information. 5 Handouts. 6 Posters.

TSP Uses (continued)

(2) Another future concept for TSPs is the WarMod TSP. It is a package of training products/materials used to initially train individual operator/maintainer/repairer, battle staff, or collective tasks for new equipment/systems. It provides the means to deliver training anywhere in the world, to include in the institution, at the unit, or at the contractor facility. Training may be conducted via formal instruction or distance learning in a live, virtual, or constructive environment. It will be used for Instructor and Key Personnel Training (IKPT) and may include doctrine, tactics, techniques, and procedures training. See Chapter V-7, TSP Development for Collective and WarMod/AMT, for WarMod TSP components and requirements.

Start Point

d. TSP development starts with the receipt of the TSP design.

Note: The TSP design and development functions are normally conducted simultaneously for a stand-alone lesson that is not designed to build on or reinforce previous training. A TSP that contains multiple lessons must be designed first, then developed to ensure sequential, progressive training.

Development Procedure

e. TSP development primarily consists of packaging the material to be presented as a complete, comprehensive training package. The general steps to follow are shown in the following table. This is just top-level guidance. The specific procedures to follow for any included product are in the pertinent product chapter (this regulation).

Step	Action
(1)	Acquire the design material.
(2)	Acquire the task performance specifications for tasks to be trained.
(3)	Develop/acquire the included training product(s).
(4)	Add administrative details.
(5)	Staff TSP with personnel and activities as appropriate for the type and content of TSP.
(6)	Obtain appropriate command authority approval.
(7)	Prepare the Camera Ready Copy (CRC)/master for reproduction.
(8)	Arrange for reproduction and distribution.

Standard Format

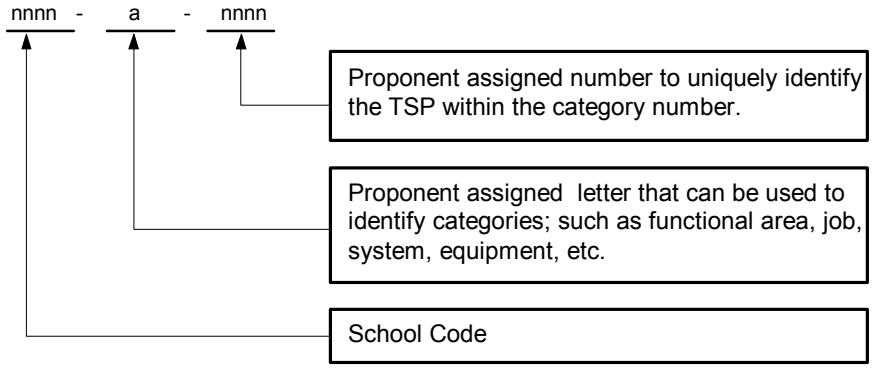
f. Appendix E shows the standardized format for Common/Shared Task and Training/TATS Course TSPs as well as lesson plans.

If you are developing a ---	Then ---
(1) Common/shared Task TSP	Attach the lesson plans to the TSP introduction pages. See Appendix E, paragraphs E-1 and E-2.
(2) Training/TATS Course TSP	(a) Resident training lesson plans will be in the standardized format.

	(b) Distance learning lessons (if applicable) will be in accordance with "Lesson/Lesson Plan Development" guidance (this chapter).
(3) TSP for --- (a) Individual task(s) trained in units ***OR*** (b) A training aid, device, simulator, or simulation for resident training	Be creative. Provide the information needed in the most efficient and effective manner possible.

Common/ Shared TSP Number

g. The TSP number positively identifies each TSP. TSP proponents number their TSPs as follows:



Example: 131 - T - 0001

Note: Retire a TSP number for at least 5 years before reuse.

Training/TATS Course TSP Number

h. Training/TATS Course TSPs use the course number and title instead of a separate TSP number.

TATS Course and RC3 TSP Submissions

i. Submit new and revised TATS Course TSPs and errata sheets for minor RC3 course revisions (including commissioned and warrant officer courses) to ATSC (ATTN: ATIC-DLC-T), USARC, and NGB 12 months before course start date.

(1) ATSC approves TSP for format, completeness (all required components), and compliance with the TRADOC Technical Media Standards.

(2) USARC and NBG begin the validation process with the proponent school.

TSP Completio

j. The TSP development is considered complete ---

For a ---	**By the ---**	**When ---**
(1) Common or shared task TSP	(a) Proponent school	The electronic Camera Ready Copy is accepted by ATSC for reproduction.
	(b) ATSC	Distributed.
(2) Training/ TATS Course TSP	(a) Proponent school	1 Proponent **validates** the TSP; school commander/commandant **approves** the course at the recommendation of the DAC **(ARNG or USAR)** or TFIO, as appropriate; and proponent **submits** TSP to ATSC **for upload** in the ADTDL. ***Note:*** Upon DTAC standup at installations, • Proponent schools will upload their approved courses directly onto their installation DTAC. • ATSC adds course name to the ADTDL course list. 2 RC3 course errata sheets: The errata sheets are mailed to ATSC for printing and distribution.

TSP Completion (continued)

For a ---	By the ---	When ---
	(b) ATSC	ATSC: 1 Uploads course in the ADTDL (until installation DTAC standups) or enters approved course name in the ADTDL course list (following installation DTAC standup). 2 Distributes all validated TATS Course DL Department of the Army Audiovisual Information Production and Distribution Program (DAVIPDP) products not available via the ADTDL. 3 Provides annually through a BOIP to the TASS Training Battalions centralized reproduction and distribution of TASS courseware as required.
(3) TADSS TSP	(a) Training Proponent	The product is validated and master is ready for reproduction.
	(b) Approving Authority	It is fully ready for distribution and implementation.

Quality Control

k. For a quality TSP, each involved individual must ensure ---
(1) TSP meets format and component requirements in Appendix E.
(2) All TSP components meet requirements identified in respective chapters of this regulation.
(3) Training provided by the TSP is ---
(a) Feasible and cost-effective.
(b) Effective and valid.
(c) Sequential and progressive.
(4) The TSP (including components) is validated and approved prior to reproduction and distribution.

VI-8-7. Total Army School System (TASS) Battalion Training

TASS Training Battalion Description

The TASS Training Battalions help personnel meet military education and proficiency standards. They ---
(1) Function as an extension of the TRADOC proponent school.
(2) Provides exportable institutional training material.

Note: TR 351-18, Total Army School System (TASS), is the regulatory guidance for the TASS.

VI-8-8. Reserve Component Course Configuration (RC3) Program Description and Requirements

Purpose a. This program provided RC3 TSPs to support the TASS Training Battalions. It is being eliminated. Proponents are responsible for maintaining currency of RC3 courseware until replacement by TATS Courses. This maintenance will be accomplished by errata sheets.

RC3 Program Require-ments b. Program requirements are as follows:
(1) Establish baseline currency of RC3 TSPs.
(2) Use errata sheets to make minor revisions to RC3 courseware, e.g., to ensure safety and environmental protection.
(3) Program obsolete RC3 courseware for redesign as TATS Courses.

Note: A course is considered obsolete and in need of major revisions when over 30% of course lessons require revision. Also, these lesson revisions would result due to task performance changes that threaten survivability/mission accomplishment or that result in a major environmental or safety impact.

RC3 TSPs c. RC3 TSPs were designed, developed, printed, distributed, and managed under the RC3 Program. **Proponent involvement with RC3 TSPs is for sustainment/update purposes only. All new development of training packages exported to TASS Training Battalions will be TATS Course TSPs or RC3 TSP errata sheets.**

Product Completio d. RC3 TSP **errata sheets** are considered complete ---

By the ---	**When ---**
(1) Proponent school	The errata sheet Camera Ready Copy is accepted by Commander ATSC for reproduction.
(2) ATSC	The errata sheets are fully ready for distribution and implementation.

VI-8-9. Course Management Plan (CMP)

Description a. The course management plan is a document that provides the course managers
and the instructors the information required to manage and conduct the course. It is required for exported training courses, phases, or modules.

Outputs b. The primary CMP development output is the complete Course Management Plan and components.

Standard Format c. Follow the Course Management Plan format provided in Appendix E.

Start Point d. Course Management Plan development starts upon approval of the course design.

CMP Components e. The CMP will contain information necessary for managing and conducting the course. Format and component guidance is in Appendix E, Lesson Plan, TSPs, and CMP Formats and Components.

CMP Completion f. The Course Management Plan is considered complete when the TATS TSP is considered complete. See "TSP Completion" in Paragraph VI-8-6.

Quality Control g. For a CMP, each involved individual must ensure it ---

(1) CMPs and all components thereof are available at the using school/organization.
(2) CMP is complete, accurate, and current.
(3) Using school/organization implements course/course components IAW CMP.
(4) Common core input is included.

TR 350-10, para 2-7/2-8.

2–7. Structure and Manning Decision Review

a. Overview. The SMDR is designed to validate Total Army training requirements and then reconcile those requirements to an affordable, acceptable, and executable training program. The SMDR will be conducted annually during the month of April. Training requirements will be initially established for the third POM year, validated for the second POM year (the primary focus of the SMDR), and fine-tuned for the first POM year. Fine-tuning will be accommodated where possible within the funded capabilities of the training activities.

b. Timeframe for SMDR—

(1) Training requirements loaded on ATRRS by components approximately 30 days prior to SMDR.

(2) Summary sheets available approximately 20 days prior to SMDR.

(3) Equipment, facility, and personnel constraints loaded on ATRRS by schools 15 days prior to SMDR.

(4) Council of Colonels (COC) review of SMDR results within 20 working days of SMDR adjournment.

(5) Input to training management GOSC review of constrained courses and approval of ARPRINT within 30 working days of SMDR adjournment.

(6) Final ARPRINT available on ATRRS within 5 working days

after GOSC approval.

c. SMDR participants—

(1) ODCSPER.
(2) ODCSOPS.
(3) ODCSLOG.
(4) OCE.
(5) NGB.
(6) OCAR.
(7) PERSCOM.
(8) TRADOC.
(9) USAREC.
(10) HSC.
(11) OTSG.
(12) AMC.
(13) DMS.
(14) DLIFLC.
(15) DINFOS.
(16) ARPERCEN.
(17) FORSCOM.
(18) Installation where specific courses are taught and the proponent schools, if locations are different.
(19) Other Services.
(20) Other Government agencies.

d. The DCSPER will be responsible for—

(1) Cochairing SMDR.
(2) Conducting overall coordination for the SMDR, to include verifying the record set of training requirements.
(3) Publishing the summary sheets.
(4) Conducting overall coordination for COC and GOSC reviews of constrained programs.
(5) Determining instructor values for each course in coordination with training MACOM.
(6) Providing the billing document to other services for the instructor values determined during the SMDR for quota courses.
(7) Providing the authority for MACOMs, schools, or ATCs to execute Memorandums of Agreement (MOAs) or Memorandums of Understanding (MOUs), and Interservice Support Agreements (ISSAs) relative to individual course support requirements.

e. The DCSOPS (DAMO–TR) will be responsible for—

(1) Cochairing SMDR.
(2) Assessing the training resource bill provided by TRADOC, HSC, and AMC to determine feasibility and supportability prior to the SMDR.

(3) Providing the guidance to resolve course-related (POI and course length, for example) issues that affect an arbitrated training program recommendation.

(4) Providing the full-time representation during the SMDR conference to recommend programs or alternatives for resolution of shortcomings in support of proposed training requirements, to include the prioritization of training.

(5) Coordination with Office of the Deputy Chief of Staff for Logistics/Office of the Chief of Engineers (ODCSLOG/OCE) or other DCSOPS activities to resolve equipment or facility issues as identified during the SMDR.

f. The CG, PERSCOM, will be responsible for—

(1) Generating, validating, and maintaining all AA training requirements (except AMEDD officer training requirements).

(2) Entering AA training requirements into ATRRS.

(3) Providing full-time participants with decision-making authority during SMDR to recommend programs as alternatives to resolve shortcomings in support of proposed training requirements.

(4) Ensuring inclusion of current force modernization data as it impacts on arbitrated training requirement programs.

(5) Ensuring loading of results from TACITS into ATRRS for use at SMDR.

(6) Providing facilities for conduct of SMDR to include access to ATRRS and teleconference capability.

g. The CDR, USAHPSA, OTSG will be responsible for—

(1) Generating, validating, and maintaining all AMEDD, AA officer, other service, and foreign national training requirements for AMEDD courses.

(2) Entering Active Army officer, other service, and foreign national training requirements onto the ATRRS for AMEDD courses.

(3) Monitoring and providing policy guidance on the training requirements generation process for AMEDD officer courses.

(4) Providing the full-time participant with decision-making authority during SMDR to recommend programs as alternatives to resolve shortcomings in support of proposed training requirements.

h. The CNGB will be responsible for—

(1) Generating, validating, and maintaining all ARNG training requirements.

(2) Entering ARNG training requirements on to the ATRRS system.

(3) Providing full-time participant with decision-making authority during SMDR to recommend programs as alternatives to resolve shortcomings in support of training requirements.

i. The CAR will be responsible for—

(1) Generating, validating, and maintaining IET USAR training requirements.

(2) Entering USAR IET training requirements onto the ATRRS.

(3) Providing the full-time participant with decision-making authority during SMDR to recommend programs as alternatives to resolve shortcomings in support of proposed training requirements.

j. The CDR, ARPERCEN, will be responsible for—

(1) Generating (in coordination with appropriate MACOMs), validating, and maintaining all in-service USAR training requirements.

(2) Entering in-service USAR training requirements into the ATRRS system.

(3) Providing the full-time participant with decision-making authority during SMDR to recommend programs as alternatives to resolve shortcomings in support of proposed training requirements.

k. The CG, TRADOC, will be responsible for—

(1) Providing input in ATRRS for all course changes or new initiatives 45 days prior to SMDR start date to include approved class sizes, course lengths, and instructor contact hours (ICH).

(2) Establishing and validating training capability bands for IET.

(3) Verifying all variable course data for each course (ICH , course lengths, class size, course type, contract code, ITRO code, for example).

(4) Identifying constraints on training caused by equipment or facility shortages that may become potential training stoppers.

(5) Directing equipment redistribution within TRADOC, as required, and monitor supply actions to obtain equipment.

(6) Identifying, confirming, and prioritizing MCA projects initiated to support training. Coordinating with OCE on facilities issues in support of SMDR.

(7) Coordinating with DA DCSOPS and DCSLOG on equipment issues as appropriate during SMDR.

(8) Prioritizing and submitting to DA requests for relocatable buildings and equipment.

(9) Providing full-time participation during SMDR.

(10) Validating installation manpower resource bills.

(11) Providing all resource data applicable to each course and providing guidance on coverage of appropriate FY resource bills via Modernization Resource Information Submission (MRIS) or Mission Decision Package (MDEP) for TRADOC schools and training centers.

(12) Providing a list of instructor requirements by course that have changed since the previous SMDR.

(1 3) Providing other service manpower resource bill t o DAPE–MPT for all courses for which TRADOC is proponent or has general staff proponency.

(14) Developing MOAs, MOUs, and ISSAs with other services as necessary to execute the approved annual training programs developed through the SMDR.

(15) Providing copies of approved MOAs, MOUs, and ISSAs to HQDA (DAPE–MPT) WASH DC 20310–0300.

l. CDR, HSC, will be responsible for—

(1) Providing input on ATRRS of all course changes or new initiatives 45 days prior to SMDR start date.

(2) Establishing and validating training capability bands for all courses.

(3) Identifying constraints on training caused by equipment or facility shortages that may become potential training stoppers.

(4) Identifying, confirming, and prioritizing MCA projects initiated to support training.

(5) Providing full-time participant at SMDR during timeframe scheduled for AMEDD courses.

(6) Developing MOAs, MOUs, and ISSAs with other services as necessary to execute the approved annual training programs developed through the SMDR.

(7) Providing copies of approved MOAs, MOUs, and ISSAs to HQDA (DAPE–MPT) WASH DC 20310–0300.

m. AMC will be responsible for—

(1) Providing input on ATRRS of all course changes or new initiatives 45 days prior to SMDR start date.

(2) Establishing and validating training capability for all AMC courses.

(3) Confirming and prioritizing MCA projects designed or programmed to support training.

(4) Providing full-time participation at SMDR during timeframe scheduled for AMC courses.

(5) Providing all resource data applicable to each course to provide guidance on coverage of appropriate FY resource bills via MRIS/MDEP.

(6) Coordinating with course proponents prior to SMDR and representing those proponents at the SMDR. Coordination may be achieved during annual proponent reviews conducted by the AMC schools.

(7) Developing MOAs, MOUs, and ISSAs with other services as necessary to execute the approved annual training programs developed through the SMDR.

(8) Providing copies of approved MOAs, MOUs, and ISSAs to

HQDA (DAPE–MPT) WASH DC 20310–0300.

n. Proponent schools

(1) Validate all USAF and Navy courses for which they are proponent.

(2) Verify personnel constraint (CP) display data.

(3) Load facility constraints (CF).

(4) Load equipment constraints (CE).

(5) Program required MCA projects to eliminate facility constraints

o. During the SMDR, manning and associated institutional training requirements are verified. Components will be challenged based on prior-year use of specific training courses. Unless component can show valid methods to improve show rates, training requirements requested will be reduced. Training requirements for each course are then compared with available training resources. Overages and shortages of manpower (military by MOS, AOC, ASI and SQI; civilian by grade), equipment, and facilities are identified. Any course that lacks sufficient resources to train its full training requirement is termed “constrained.” Either additional training resources are provided for each constrained course or the training program for that course is adjusted. The result is a recommended training program. Upon completion of the SMDR, decision briefings will be presented to a COC and General Officer Council to resolve issues where training courses are constrained. The final training program for a given FY is published in the ARPRINT and serves as the basis for the development of class schedules. The ARPRINT indicates both the training requirement and the programmed number so that constraints can be audited.

2–8. Training Resource Arbitration Panel

a. The purpose of the TRAP is to manage changes to the training program during the execution year.

b. The DCSPER manages the TRAP with the following participants as members—

(1) ODCSOPS.

(2) OCAR.

(3) ARPERCEN.

(4) NGB.

(5) PERSCOM.

(6) TRADOC.

(7) HSC/OTSG.

(8) AMC.

(9) USAREC.

(10) Other Services.

c. The TRAP attempts to provide sufficient training seats to train the Total Army program plus other non-Army students who attend Army schools. It is extremely important that all deadlines established according to these TRAP procedures be followed.

d. Skill level 1 TRAP

(1) The TRAP is convened monthly. The first TRAP for a new FY will be held in the preceding February. This TRAP will address all transactions to include increases, reductions, trades, and execution of training bands. TRAP issues for the current FY will be considered on an “as needed” basis after the February TRAP. The SMDR, held during April, will consider “show stopper” changes to the execution year training program and those changes critical to building the outyear program. The following are timeframes associated with skill level 1 TRAP actions—

(a) Components initially load requested changes on ATRRS not later than 8 calendar days prior to the TRAP meeting.

(b) Components review other component changes for possible trades until 2 days (1200 hours) prior to the TRAP. At noon 2 days prior to the TRAP, ODCSPER will print reports to be used at the TRAP meeting.

(c) Approved actions from the TRAP will be posted to the ATRRS system by DAPE–MPT not later than 3 working days after the TRAP.

(2) Training increases will first be evaluated for trade-offs among input agencies. If trades cannot be successfully accomplished, schools and ATCs will be asked if the increases can be accepted without additional resources. (In TRADOC this is expressed as a training band.) Training bands for skill level 10 MOS will be validated with each appropriate school not later than 1 February for the upcoming FY. If training bands are exercised at the TRAP, ATRRS electronic messages will be automatically generated and sent to the appropriate school or ATCs informing them that they have 5 working days from the date of the message to adjust class schedules. Schedule changes should include classes beginning no sooner than 120 days from date of the message to allow time for individuals to be recruited and to complete BT. Major commands will coordinate instructor and funding needs on projected TRAP actions and will identify the instructor difference between SMDR and ARPRINT and the projected TRAP requirements. This difference will be reported as the instructor bill. If double or triple shifting of classes is required to support a TRAP requirement, selective supervisor positions may also be included in the bill. If schools identify a major end item of equipment shortage, the major training command will

attempt to fill the requirement through temporary loan, reallocation, or out of DAMPL sequence action. Equipment requirements not fulfilled by this process will be included in a total bill package to HQDA, DAPE–MPT. Accounting for instructor changes as a result of TRAP actions is the duty of HQDA, DAPE–MPT. Changes must be handled “off-line” because The Army Authorization Documents System (TAADS) documents cannot be changed to accommodate TRAP actions. Changs to instructor levels will be accommodated by manpower trade-offs within each MACOM, provided trade-offs are available. Manpower tradeoffs can be accommodated through 30 November of the current FY. Requested TRAP increases after 30 November that require additional manpower will require a directed military overstrength (DMO). (See para 2–8*d*(4)). If trade-offs are approved, notification to initiate action by PERSCOM will be facilitated by a memorandum to PERSCOM, TAPC–EPS, from HQDA, DAPE–MPT, subject: “Execution Year Change Notice,” which will identify gaining and losing activities, schools, and installations. This memorandum is authority to change authorizations and initiate by-name fill accordingly. Once executed, PERSCOM will notify HQ TRADOC, ATPL–AE, of the individual names of projected fill.

(3) Training decreases will first be evaluated for trade-offs among input agencies. If trades cannot be successfully accomplished, the following actions will be taken—

(a) If reductions occur from February through August for the upcoming FY, reductions will be retained in the “CT” (course trap) display on ATRRS; schools will not make adjustments to their class schedules. During this period (February–August), these reductions may be picked up by any component as a trade and posted to the “CR” (course requirement) display. After the August TRAP, all remaining reductions will be posted to the “CR” display and schools will adjust their class schedules downward to reflect these reductions by the end of August. Coordination must be made between PERSCOM, TAPC–EPT–S, and the schools to make sure classes with valid reservations are not eliminated. Once coordinated and adjusted, these reductions are final.

(b) Reductions that occur after the August TRAP for the upcoming FY will be recognized at the TRAP and be held in the “CT” display for a period of approximately 60 days (2 TRAPs). If reductions equal a class size, REQUEST will close selected classes from recruiting. If, at the end of 60 days no input agency has picked up these reductions, the reductions will be posted to the “CR” display in ATRRS, and the appropriate school will be notified via ATRRS electronic message to adjust class schedules within 5 working days of receipt of message. Reductions will be made to future seats only and coordination must be made between PERSCOM , TAPC–EPT–S, and the school where to make these reductions.

(4) COC DMO: When expansion of training will require additional resources, the following procedures apply—

(a) The requesting component certifies that the requested increase is correct and verified with written justification (to include reason for increase, authorizations, current and projected fill, impact if increase is not provided), and has been signed at the colonel level. This written justification will be provided to HQDA, DAPE–MPT.

(b) The major training command (TRADOC, HSC) will be notified by ATRRS electronic message or telephone, and asked to provide the resource bill within 10 working days of notification. Justification for all requested bills will also be provided in a followup memorandum or ATRRS message.

(c) Once the bill has been provided, PERSCOM will have 5 working days to assess the ability to provide additional instructors (if required).

(d) DCSOPS will have 5 working days to assess the ability to provide additional equipment (if required).

(e) When all data are available, the COC Chairperson will present information for concurrence or nonconcurrence to the COC and attempt to negotiate final action. Presentation will either be by memorandum for written concurrence or nonconcurrence, or a meeting will be convened. COC action must be unanimous. If the COC disapproves the request but the component desires reconsideration, a General Officer TRAP will be convened.

(f) Voting members of the COC are : HQDA, DAPE–MPT (Chair), DAPE–MBF, DAPE–MPE , DAPE–MPA; ODCSOPS, DAMO–TRP; PERSCOM; OCAR/ARPERCEN; NGB; TRADOC (as appropriate); and HSC/OTSG (as appropriate).

(g) If approval is given, the school will be notified via ATRRS electronic message of increase and resource approval. If DMO is required, this action will be coordinated with ODCSPER, DAPE–MB for approval prior to school notification. DMO requests will contain the following information: unit identification code (UIC), number of personnel, grade and specialty of each position, and duration of each position. The school will have 5 working days after notification of approval to increase class schedules. Adjustments to class schedules should be no sooner than 120 days from the date of receipt to the message to allow time for recruiting and possible BT.

e. All training not classified IET TRAP—

(1) The TRAP will be convened monthly. The first TRAP for a new FY will be held in the preceding February. This TRAP will address increases, reductions, and trades among components. TRAP issues for the current FY will be considered on an “as needed” basis after the February TRAP. The SMDR, held during April, will consider

"show stopper" changes to the execution year training program and those changes critical to building the outyear program. The following are timeframes associated with Skill level 2 and above TRAP actions—

(a) Input agencies (quotamanagers) initially load requested changes on ATRRS not later than 14 calendar days prior to the TRAP meeting.

(b) Training MACOMs (TRADOC/HSC/AMC) review component requests for resolution and provide approval or disapproval at the TRAP.

(c) Approved actions from the TRAP will be posted to ATRRS system by HQDA, DAPE–MPT not later than 5 working days after the TRAP.

(2) Training increases will first be evaluated for trade-offs among input agencies . If trades cannot be successfully accomplished, schools will be asked if the increase can be accepted without additional resources. If not, MACOMs will coordinate with the schools to identify additional instructor and funding needs to accommodate the projected TRAP training requirement identifying the instructor difference between the established SMDR or ARPRINT and projected TRAP requirements. This difference will be reported as the instructor bill. If double or triple shifting of classes is required to support a TRAP requirement, selective supervisor positions may also be included in the bill. If schools identify a major end item of equipment shortage, the MACOM will attempt to fill the requirement through temporary loan, reallocation, or out of Department of the Army Master Priority List (DAMPL) sequence action. Equipment requirements not fulfilled by this process will be included in a total bill package to HQDA, DAPE–MPT. Instructor changes are a duty of HQDA, DAPE–MPT. Changes must be handled "off-line" because TAADS documents cannot be changed to accommodate TRAP actions. Changes to instructor levels will be accommodated by manpower trade-offs with each training MACOM, provided trade-offs are available. Manpower trade-offs can be accommodated through 30 November of the current FY. Requested TRAP increases after 30 November that require additional manpower will require a DMO (See para 2–8*e*(5).) If trade-offs are approved, notification to initiate action by PERSCOM will be facilitated by a memorandum to PERSCOM, TAPC–EPS from HQDA, DAPE–MPT, subject: "Execution Year Change Notice," which will identify gaining and losing activities, schools, and installations. This memorandum is authority to change authorizations and initiate by name fill accordingly. Once executed, PERSCOM will notify the Training MACOM, (HQ TRADOC, ATPL–AE/info to ATOM–O) of the individual names of projected fill. The training MACOM will coordinate with schools and adjust "C3" (class schedules) and "RA"

(quota allocations) displays as appropriate. Input agencies should inform HQDA, DAPE–MPT via ATRRS electronic message or telephone when adjustments requested are for specific classes or timeframes. Otherwise, the decision where to adjust class schedules or RA display is left up to the MACOM or schools. If program increases are approved at the TRAP, the school has 5 working days from the date of notification to adjust class schedules.

(3) For other than HQ TRADOC, training decreases must equal or exceed optimum class size for consideration at the TRAP. If less than optimum, the quota management system must be used. If training decreases equal or exceed optimum class size, they will first be evaluated for trade-offs among input agencies. If trades cannot be successfully accomplished, the following action will be taken—

(a) If reductions occur from March through August for the upcoming FY, reductions will be reflected in the “CR” display on ATRRS. Schools will adjust class schedules based on MACOM guidance. Coordination must be made between HQ TRADOC (ATOM–O)/HSC and the schools to ensure classes with valid reservations are not eliminated.

(b) Reductions that occur after the August TRAP for the upcoming FY will be recognized at the TRAP. If reductions equal or exceed optimum class size, the reduction will be posted to the “CR”

display in ATRRS and the appropriate school will be notified via ATRRS electronic message to adjust class schedules within 5 working days of receipt of message. Reductions will be made to future seats only and coordination must be made with HQ TRADOC (ATTG–MPS)/HSC/AMC/schools on where to make these reductions. Reductions of less than optimum class size are to be managed through the QMS.

(4) Training decreases for HQ TRADOC require the following actions—

(a) If reductions occur from March through August for the upcoming FY, reductions will be reflected on the “CR” display in ATRRS and the schools will adjust class schedules based on MACOM guidance.

(b) Reductions that occur after the August TRAP for the upcoming FY will be recognized and finalized at the TRAP. Reductions will be posted to the “CR” display in ATRRS, and the appropriate school will be notified via ATRRS electronic message to adjust class schedules within 5 working days of receipt of message.

(c) Coordination must be made between HQ TRADOC (ATOM–O)/HSC and the schools to ensure classes with valid reservations are not eliminated. Reductions will be made to future seats only and coordination must be made with HQ TRADOC (ATOM–O)/HSC/AMC/schools on where to make these reductions.

(5) COC DMO: When expansion of training will require additional resources, the following procedures apply—

(a) The requesting component certifies requested increase is correct and verified with written justification (to include reason for increase, authorizations, current and projected fill, impact if increase is not provided), and has been signed at the colonel level. This written justification will be provided to HQ DA (DAPE–MPT), WASH DC 20310–0300.

(b) The major training command (TRADOC, HSC, and AMC) will be notified by ATRRS electronic message or telephone and asked to provide resource bill within 10 working days of notification. Justification for all requested bills will also be provided in a follow-up memorandum or ATRRS message.

(c) Once the bill has been provided, PERSCOM will have 5 working days to assess the ability to provide additional instructors (if required).

(d) DCSOPS will have 5 working days to assess the ability to provide additional equipment (if required).

(e) When all data is available, the COC Chairperson will present information for concurrence or nonconcurrence to the COC and attempt to negotiate final action. Presentation will either be by memorandum for written concurrence or nonconcurrence, or a meeting will be convened. COC action must be unanimous. If the COC disapproves the request and the component desires reconsideration, a General Officer TRAP will be convened.

(f) Voting members o f the CO Care: HQDA, DAPE–MP T (chair), DAPE–MB, DAPE–MPE, DAPE–MPA, DAPE–MPO; ODCSOPS, DAMO–TRP; PERSCOM; OCAR/ARPERCEN; NGB; TRADOC (as appropriate); HSC/OTSG (as appropriate); and AMC (as appropriate).

(g) If approval is given, the school and MACOM will be notified via ATRRS electronic message of increase and resource approval. If DMO is required, this action will be coordinated with ODCSPER, DAPE–MB for approval prior to school notification. The DMO request will contain the following information: UIC, number of personnel, grade and specialty of each person, and duration of each DMO position. The school will have 5 working days after notification of approval to increase class schedules.

TR 350-18, para 3-28.

3-28. Student academic records.

a. The TASS battalion commander is responsible for ensuring all student input/output data is posted to ATRRS within 10 working days of course start date and completion date.

b. The TASS battalion will maintain individual records for each student for 12 months, containing the following documents:

(1) The enrollment application (AATAS or DA Form 4187 for IDT).

(2) The attachment order, if prepared.

(3) A copy of the pre-execution checklist with appropriate signatures.

(4) All student leadership evaluations.

(5) All test scores.

(6) All counselings, to include initial, performance, leadership, end of course evaluations, and individual developmental action plans.

(7) Copy of course completion, DA Form 1059.

(8) Any other correspondence referencing the soldier, i.e., drop packet.

(9) DA Form 705 (maintained for professional development courses, and selected functional courses).

(10) DA Form 3349 with MMRB results (if applicable).

c. After the 12-month record retention period, the DA Form 1059 will be removed from the individual records and kept on file, IAW AR 25-400-2. Supporting documentation is destroyed.

d. The TASS battalion may prepare a certificate of training for each student (except AMEDDC&S/OCS courses) upon successful completion of all phase requirements. The certificate of training will include the student's name, course title and phase, and completion date.

e. Records for disenrolled students must be maintained for two years IAW AR 25-400-2/TRADOC Reg 351-10.

FM 25-100, Ch 1.

Training Overview

The Army training mission is to prepare soldiers, leaders, and units to deploy, fight, and win in combat at any intensity level, anywhere, anytime.
— The training focus is on our wartime missions.
— Our top priority is training.
— Maintenance is a vital part of our training program.
— Realistic, sustained multiechelon totally integrated combined arms training must be continuously stressed at all levels.
— Every soldier, leader, and unit training program must be carefully planned, aggressively executed, and thoroughly assessed.
General Carl E. Vuono

Training Challenges

The Army exists to deter war or, if the deterrence fails, to reestablish peace through victory in combat wherever US interests are challenged. To accomplish this, the Army's forces must be able to accomplish their assigned strategic roles. Moreover, for deterrence to be effective, potential enemies must perceive that the Army has the capability to mobilize, deploy, fight, and sustain combat operations in unified action with our sister services and allies. Training, therefore, is the process that melds human and material resources into these required capabilities.

We train the way we intend to fight because our historical experiences amply show the direct correlation between realistic training and success on the battlefield. The Army has an obligation to the American people to ensure its sons and daughters gointo battle with the best chance of success and survival. This is an obligation thatonly outstanding and realistic training conducted to the most exacting standards can fulfill. The highest quality training is, therefore, essential at all levels.

We can trace the connection between training and success in battle to one of the Army's earliest leaders and trainers, General Winfield Scott, in the War of 1812. For nearly two years, American soldiers had suffered loss after loss against British forces along the Canadian border. To end the defeats, President James Madison appointed new military leaders, one of whom was Scott. On March 24, 1814, he took charge of a small, poorly prepared force at Buffalo and set out to make these men the professional equals of the British soldier. His training, based on the current British handbook, was hard and realistic, and his discipline was strict. He drilled his men ten hours a day in infantry tactics, the use of the musket and bayonet, and close order drill. The first test of Scott's training came on July 3, 1814, during the battle of Chippewa. For the first time in the war, American soldiers stood up to their foe and drove them from the field. Scott's training had paid off. He had trained and he had

won. Today's leaders must learn the lessons of history and find ways to use this wisdom to meet contemporary training challenges. The future battlefield will be characterized by high volumes of fire and lack of a distinct FEBA or FLOT trace; in many cases, small units and task forces may find themselves either bypassed or encircled. Units will frequently be cross attached in order to react to the flow of the battle or to reconstitute units. The key to winning in that battlefield environment will be the understanding of "how we fight" at every level and the demonstrated confidence, competence, and initiative of our soldiers

Active and Reserve

The differences between Active and Reserve training opportunities are important to the Army's senior leaders and theater commanders in chief. They must be prepared to provide or receive units from the National Guard, Army Reserve, and Active Component in wartime or in peacetime exercises.

ACTIVE COMPONENT (AC)

CONUS UNITS

AC CONUS units are generally located at installations that have nearby modern ranges and training areas available for unit training; classrooms, simulators, and learning centers available for individual training; and academies, libraries, and other professional development resources available for leader training. These units normally enjoy relatively high levels of personnel and equipment fill. Combat training centers (CTCs) also provide unique training opportunities. The relative geographical concentration and ease of access to all these training facilities provide a good overall training environment.

AC OCONUS UNITS

Active duty units that are stationed overseas normally experience more and their leaders. Training is the means to achieve the tactical and technical proficiency that soldiers, leaders, and units must have to enable them to accomplish their missions. Therefore, training must—Practice the techniques and procedures of integrated command and control. Enable units to apply joint and combined doctrine and tactics. Exercise all support systems required to sustain combat operations. Responsibility for the Army's success on the future battlefield rests on the shoulders of today's Active, National Guard, Reserve, and civilian leaders at all levels. These senior leaders must concentrate training on warfighting skills.

Component Training

geographic dispersion than CONUS AC units. However, these units often enjoy higher fills of MOS-qualified soldiers and equipment than their AC CONUS counterparts. The OCONUS units usually have the unique motivation and training opportunities afforded by being assigned "real world," wartime-oriented missions. OCONUS major training facilities are normally smaller and farther from garrison than those that serve CONUS-based AC units. While local training areas (LTAs)

are available, their small size and environmental restrictions tend to constrain their use. In some parts of the world, maneuver rights areas (MRAs) allow large-unit combined arms and services exercises on the host nation countryside; however, these are normally subject to maneuver restrictions.

RESERVE COMPONENT (RC) UNITS

The training environment of the RC, the Army National Guard and Army Reserve, is generally more challenging than that of the AC. The training year for the average soldier in an RC unit consists of 24 days of inactive duty training (IDT) and 15 days of annual training (AT)—39 days per year. The soldiers and leaders in the RC have military service and separate civilian careers competing for their attention and time. These units face considerable geographic dispersion. For example, the average RC battalion is dispersed over a 150- to 300-mile radius; soldiers travel an average of 40 miles to reach the nearest LTA; and units must move an average of 150 miles to the nearest major training area (MTA). RC units have to recruit many of their own soldiers. Since these new recruits may be assigned to the RC unit prior to completion of initial entry training, the RC may have fewer MOS-qualified personnel assigned than their AC counterparts. Notwithstanding these challenges, the Reserve Components offer the nation a large measure of deterrence and warfighting power per dollar invested.

Principles of Training

TRAIN AS COMBINED ARMS AND SERVICES TEAM

Today's Army doctrine requires combined arms and services teamwork. When committed to battle, each unit must be prepared to execute combined arms and services operations without additional training or lengthy adjustment periods. Combined arms proficiency develops when teams train together. Leaders must regularly practice cross attachment of the full wartime spectrum of combat, combat support, and combat service support units. Peacetime relationships must mirror wartime task organization to the greatest extent possible. The full integration of the combined arms team is attained through the "slice" approach to training management. This approach acknowledges that the maneuver commander controls and orchestrates the basic combat, combat support, and combat service support systems. It states that in order to fight with these systems, he must train them often enough to sustain combatlevel proficiency. In short, the maneuver commander, with the assistance of higherlevel leaders, must forge the combined arms team. An example of a "brigade slice" is at Figure 1-1. Using this same approach, to assist division-level training, the corps commander requires all corps units that would be supporting the division in wartime to participate in division training exercises. The divisional and nondivisional units that habitually train with the division are termed the "division slice."

TRAIN AS YOU FIGHT

The goal of combat-level training is to achieve combat-level standards. Every effort must be made to attain this difficult goal. Within the confines of safety and common sense, leaders must be willing to accept less than perfect results initially and demand realism in training. They must integrate such realistic conditions as smoke, noise, simulated NBC, battlefield debris, loss of key leaders, and cold weather. They must seize every opportunity to move soldiers out of the classroom into the field, fire weapons, maneuver as a combined arms team, incorporate protective measures against enemy actions, and include joint and combined operations.

USE APPROPRIATE DOCTRINE

Training must conform to Army doctrine. FM 100-5, Operations, and supporting doctrinal manuals describe common procedures and uniform operational methods that permit commanders and organizations to adjust rapidly to changing situations. At higher echelons, standardized doctrinal principles provide a basis for a common vocabulary and for military literacy across the force. In units, new soldiers will have little time to learn nonstandard procedures. Therefore, units must train on peacetime training tasks to the Army standards contained in mission training plans (MTPs), battle drill books, soldier's manuals, regulations, and other training and doctrinal publications.

USE PERFORMANCEORIENTED TRAINING

Units become proficient in the performance of critical tasks and missions by practicing the tasks and missions. Soldiers learn best by doing, using a hands-on approach. Leaders are responsible to plan training that will provide these opportunities. All training assets and resources, to include simulators, simulations, and training devices, must be included in the strategy.

TRAIN TO CHALLENGE

Tough, realistic, and intellectually and physically challenging training both excites and motivates soldiers and leaders. It builds competence and confidence by developing and honing skills. Challenging training inspires excellence by fostering initiative, enthusiasm, and eagerness to learn. Successful completion of each training phase increases the capacity and motivation of individuals and units for more sophisticated and challenging achievement.

TRAIN TO SUSTAIN PROFICIENCY

Once individuals and units have trained to a required level of proficiency, leaders must structure collective and individual training plans to repeat critical task training

at the minimum frequency necessary for sustainment. Mission training plans and the Individual Training Evaluation Program (ITEP) are tools to help achieve and sustain collective and individual proficiency. Sustainment training is often misunderstood, although it is a reasonable, commonsense approach to training. Put simply, sustainment training must sustain skills to high standards often enough to prevent skill decay and to train new people. Army units must be prepared to accomplish their wartime missions by frequent sustainment training on critical tasks; they cannot rely on infrequent "peaking" to the appropriate level of wartime proficiency. As depicted in Figure 1-2, sustainment training enables units to operate in a "band of excellence" by appropriate repetitions of critical task training during prime training periods.

TRAIN USING MULTIECHELON TECHNIQUES

To use available time and resources most effectively, commanders must simultaneously train individuals, leaders, and units at each echelon in the organization during training events. Multiechelon training is the most efficient way of training and sustaining a diverse number of mission essential tasks within limited periods of training time.

TRAIN TO MAINTAIN

Maintenance is a vital part of every training program. Maintenance training designed to keep equipment in the fight is of equal importance to soldiers being expert in its use. Soldiers and leaders are responsible for maintaining all assigned equipment in a high state of readiness in support of training or combat employment.

MAKE COMMANDERS THE PRIMARY TRAINERS

The leaders in the chain of command are responsible for the training and performance of their soldiers and units. They are the primary training managers and trainers for their organizations. To accomplish their training responsibility, commanders must-

Senior Leaders

Effective training is the number one priority of senior leaders in peacetime. In wartime, training continues with a priority second only to combat or to the support of combat operations. Senior leaders must extract the greatest training value from every opportunity in every activity. Effective training requires their continuous personal time and energy as they accomplish the following:

Develop and communicate a clear vision. The senior leader's training vision provides the direction, purpose, and motivation necessary to prepare individuals and organizations to win in war.
Base training on wartime mission require ments.
Identify applicable Army standards. Assess current levels of proficiency.

Provide the required resources. Develop and execute training plans that result in proficient individuals, leaders, and units.' **and Training**
It is based on a comprehensive understanding of the following:
— Mission, doctrine, and history.
— Enemy capabilities.
— Organizational strengths and weaknesses.
— Training environment.

Require their subordinates to understand and perform their roles in training. Since good training results from leader involvement, one of the commander's principal roles in training is to teach subordinate trainers how to train and how to fight. He provides the continuing leadership that focuses training on the organization's wartime mission. The commander assigns officers primary responsibility for collective training and noncommissioned officers primary responsibility for individual training. The commander is the integrator who melds leader and individual training requirements into collective training events using multiechelon techniques (Figure 1-3).

Train all elements to be proficient on their mission essential tasks. They must integrate and train to Army standard all elements in and supporting their command—combat, combat support, and combat service support-on their selected mission essential tasks. An important requirement is for all leaders to project training plans far enough into the future to coordinate resources with long lead times.

Centralize training planning and decentralize training-execution. Senior leaders centralize planning to provide a consistent training focus on wartime missions from the top to the bottom of the organization. However, they decentralize execution to ensure that the conduct of mission-related training sustains strengths and overcomes the weaknesses unique to each unit.

Establish effective communications between command echelons. Guidance based on wartime missions and priorities flows from the highest echelons downward. Specific information about individual and collective training proficiency and needs flows from the lowest organizational levels upwards. Leaders at all levels use effective two-way communications to exchange feedback concerning the planning, execution, and assessment of training.

Develop their subordinates. Competent and confident leaders build cohesive organizations with a strong chain of command, high morale, and good discipline.

Therefore, senior leaders create leader development programs that develop a warfighter's professionalism-knowledge, attitudes, and skills. They mentor, guide, listen to, and "think with" subordinates to challenge their depth of knowledge and understanding. Senior leaders share experienced insights that encourage subordinates to study their profession and develop themselves. They train leaders to plan training carefully, execute aggressively, and assess short-term achievement in terms of desired long-term results. Effective leader development programs will continuously influence the Army as younger leaders progress to higher levels of responsibility.

Involve themselves personally in planning, executing, and assessing training.
They are actively involved in planning for future training. They create a sense of stability throughout the organization by protecting approved training plans from training distracters. Senior leaders are present during the conduct of training and provide experienced feedback to all participants.

Demand training standards are achieved. Leaders anticipate that all tasks will not be performed to standard. Therefore, they design time into training events to allow additional training on tasks not performed to standard. It is more important, however, that they achieve the established standard on a limited number of tasks during a training event than to attempt many and fail to achieve the standards on any, rationalizing that they will take corrective action at some later training period. Soldiers will remember the enforced standard, not the one that was discussed.

Battle focus is a concept used to derive peacetime training requirements from wartime missions. Battle focus guides the planning, execution, and assessment of each organization's training program to ensure its members train as they are going to fight. Battle focus is critical throughout the entire training process and is used by commanders to allocate resources for training based on wartime mission requirements. Its implementation enables commanders at all levels and their staffs to structure a training program which copes with nonmission-related requirements while focusing on mission essential training activities. Battle focus is a recognition that a unit cannot attain proficiency to standard on every task whether due to time or other resource constraints. However, commanders can achieve a successful training program by consciously narrowing the focus to a reduced number of vital tasks that are essential to mission accomplishment. A critical aspect of the battle focus concept is to understand the responsibility for and the linkage between the collective mission essential tasks and the individual tasks which support them. The diagram at proper sequence to derive optimum training Figure 1-4 depicts the relationships and the benefit from each training opportunity.

Foster a command climate that is conducive to good training. Senior leaders create a command climate that rewards subordinates who are bold and innovative trainers. They challenge the organization and each individual to train to full potential.

Eliminate training distractions. The commander who–has planned and resourced a training event is responsible to ensure that the maximum number of soldiers participate. The administrative support burdens cannot be ignored, but they can be managed using an effective time management system. Senior leaders must support their commanders' efforts to train effectively by eliminating training distracters and reinforcing the requirement for all assigned personnel to be present during prime training time.

The commander and the command sergeant major (CSM) must jointly coordinate the collective mission essential tasks and individual training tasks on which the unit will concentrate its efforts during a given period. The CSM and NCO leaders must select the specific individual tasks, which support each collective task, to be trained during this same period. NCOs have the primary role in training and developing individual soldier skills. Officers at every level remain responsible for training to established standards during both individual and collective training.
The training management approach to implement the battle focus is depicted in Figure 1-5. Chapter 2 explains the mission essential task list development process—training must relate to the organization's wartime mission. Chapter 3 describes the long-range, short-range, and near-term training plans that leaders use to manage training over various periods of time. Chapter 4 discusses the execution of training and the role of senior leaders. Chapter 5 explains the procedures for evaluating training and conducting organizational assessments. Training evaluations and organizational assessments are feedback mechanisms that leaders use to keep the system dynamic and capable of continual improvement and fine tuning.

Tab 2

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Standard 2 Reference Excerpts

AR 351-1, para 1-5. Mission: The mission of the Army School System is to-
a. Provide progressive and sequential leader training which prepares those leaders to execute the Army's operational doctrine in war or peace.
b. Support training research and system development.
c. Take part in the formulation of military doctrine.
d. Develop individual proficiency training which results in the award of a special skill identifier (SSI), a military occupational specialty (MOS), or an additional skill identifier (ASI).
e. Develop strategy for export of training programs to the unit level.
f. Promote the highest standard of professional military competence.

TR 350-6, para 2-5b, Investment strategy in IET.

(1) The U.S. Army's motivated and professional IET cadre can train almost anyone who has the mental and physical capacity to complete IET. Each cadre member accepts responsibility for providing a positive environment in which new soldiers have every opportunity to succeed.

(2) Cadre will train their soldiers by building on and affirming their strengths and shoring up their weaknesses. It is imperative that unit cadre establish high standards of performance and insist their soldiers meet these standards. Cadre members coach, mentor, and assist their soldiers in meeting the standards through performance counseling and phase goal setting. Discharging soldiers because they fail to meet certain standards, when additional coaching could bring them up to par, is not in keeping with the intent of the investment strategy. The investment strategy raises the individual to the standard; it does not lower the standard for the individual.

TR 350-6, para 2-12a, Soldierization and reinforcement training in AIT/OSUT.
a. Initial entry soldiers must continue to receive the same strong emphasis on soldierization throughout AIT/OSUT that was present during BCT. This is to be accomplished through reinforcement training (focusing on drill and ceremonies, Army Values, teamwork, customs and courtesies, and wear of the uniform), inspections, increased demand of personal responsibility, a progressive PFT program, and role modeling by the drill sergeant and cadre.

TR 350-6, para 3-1c, Initial Entry Training strategy.
c. Primarily, SMEs will conduct MOS training; however, to the maximum extent feasible, drill sergeants will be involved in the technical training in AIT. Drill sergeants are the MOS role models. They will assist with MOS skill practice and will, at times, be assigned additional duties as assistant instructors to augment SME instruction. Academic instructors must assist unit cadre in the soldierization effort.

TR 350-6, para 3-31, Testing procedures for AIT and the MOS portion of OSUT.
a. Proponents will develop within-course tests (end-of-annex/block/module) for MOS-producing courses according to guidance outlined in TRADOC Reg 350-70. The validity of each task being evaluated and its relevance will be continuously assessed and changed or modified as appropriate.

b. Commanders will ensure soldiers are tested IAW the SEP for the course being presented. Guidelines for development of SEPs are outlined in TRADOC Reg 350-70, Chapter VI-7, Student Performance Measurement/Testing. The SEP informs soldiers, instructors, and other personnel of the course graduation requirements. A copy of the SEP must be explained to each IET student at the beginning of each course and prominently posted on the bulletin board.

c. Within-course tests must provide a fair and accurate evaluation of the soldier's ability to perform the tasks presented to established standards.

d. Hands-on, performance-oriented testing will be the norm throughout TRADOC. If situational-based, open-book reference written tests are used, they must require the student to not only extract data, but also to apply the data to specific situations likely to be encountered on-the-job. Closed-book, knowledge-based written tests should be used only if it is necessary to verify the learner's knowledge as a prerequisite for later performance testing where the knowledge must be used (e.g., as a building block to later tests). All testing should be conducted in an environment that would replicate the soldier's duty position in the unit in so far as safety and environmental considerations will allow and IAW test administration instructions.

e. Each test will have at least two versions. All versions may be used concurrently.

f. Tests will be monitored by quality control personnel reporting to the brigade or ATC commander, as determined by the local commander. Unit cadre personnel must be certified IAW TRADOC Regs 350-70 and 350-18 before they are permitted to participate in the testing process.

g. Tests will be scored on a "GO/NO-GO" basis. The passing ("cutoff") score for making the "GO/NO-GO" determination will be determined during test design and validation, and will be documented within the course Student Evaluation Plan.

h. Counseling will be conducted with each soldier to reinforce strengths on tasks accomplished, and to correct weaknesses on tasks missed.

i. The goal should remain 100 percent performance to standard on all tasks by each soldier. Soldiers who are unable to achieve this goal should be considered for remedial training and re-testing prior to graduation, or reassignment to another company in a follow-on cycle.

j. Remedial training is a joint responsibility of students and trainers. As such, students failing to achieve task/course standards must be provided opportunities to review material, and practice skills prior to undergoing retest. Trainers must provide appropriate remedial assistance as necessary.

k. Re-testing will include all tasks failed.

l. In accordance with the Student Evaluation Plan, IET soldiers who fail an end-of-annex/block/module retest are prohibited from progressing further in the course and should be considered for new start to a follow-on class or elimination.

TR 350-10, para 2-7g.

g. Student evaluations. Small group leaders and instructors will—

(1) Determine if the student has demonstrated a sufficient level of competency to pass the course IAW the student evaluation plan as prescribed in TRADOC Reg 350-70.

(2) Conduct developmental counseling to provide students information on their strengths and weaknesses, and courses of action to improve performance.

(3) Consolidate and analyze student performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commandant/Course Management Plan (CMP). Small group leaders, SSGLs, and instructors will provide students documented feedback and will use analysis results to determine ratings for completing DA Form 1059 (Service School Academic Evaluation Report (AER)) and course academic records and reports. Records and reports must adequately support appropriate administrative action for students who fail to meet course requirements.

(4) Complete an AER (DA Form 1059) for all students per AR 623-1. Whenever possible, students should receive a copy of their completed AER at graduation. However, although Army policy allows for completion within 60 days after graduation, at a minimum, students will be provided an opportunity to review their draft AER prior to departure. Written comments in block 16 will be tailored for each individual.

TR 350-18, paras 4-5 & 4-6.

4-5. Visitor folders. Every class instructor will have at least one visitor folder at a table or desk in the rear of the classroom or field training area. These folders will include, as a minimum:

a. Visitors sign-in log.

b. Current class roster.

c. TASS training battalion attendance register (TRADOC Form 270-R), IAW paragraph 3-12, above. IDT only.

d. The current training schedule.

e. The course POI/CMP and current lesson plan.

f. Instructor credentials, to include--

(1) Copy of the instructor's proponent certification, or a copy of the memorandum to the proponent requesting certification.

(2) Appropriate operator’s permit.

g. Critique sheets for class visitors.

h. Daily risk assessment worksheet.

4-6. Instructor folders. Instructor folders will be maintained by each TASS battalion and school code. Instructors directed to other TASS battalions/schools/remote training sites will report with a copy of their instructor folder. Instructor folders will be current and contain--

a. Instructor's proponent certification/IPC.

b. Instructor training certificate(s) (or DA Form(s) 1059) for ITC, SGI, VTTITC, as appropriate.

c. Copy of orders or request for orders assigning ASI 5K or SQI 8 or H, as appropriate.

d. Copy of certificates of any civilian training related to the course being taught.

e. Documentary evidence of graduation from the course to be taught.

f. Documentary evidence of appropriate training/experience for the level of the course being taught.

g. Valid DA Form 705.

h. Documentary evidence of meeting the same MOS as the students in the course (as required).

i. Copies of instructor evaluations from the previous 12 months.

j. Appropriate operators permit.

TR 350-70

VI-8-4. Total Army Training System (TATS) Course Development Requirements, Continued

Development/ Requirements

e. TATS courses are developed ---

(1) For new course requirements and for replacement of existing AC/RC3 courses.

Note: Proponents should continue minor revisions to existing AC and RC3 courses using errata sheets.

(2) Based on TATS Course design, considering reclassification training requirements, resource constraints, and RC training and equipment constraints.

Note: See Chapter VI-6, Training Course Design, "TATS Course Design Requirements."

(3) Within a TATS Training Year and using a Total Army Course (phases, modules, tracks, lessons, tests) and media to ensure training of all soldiers to perform to task performance standard unless exception is granted by the DCST. See Chapter VI-6, Training Course Design, "TATS Course Design Requirements."

(4) Following procedures in the following paragraphs, this chapter: "Training Course Development Description and Requirements," "Lesson/Lesson Plan Development," and "TSP Development and Submission for Individual Training."

(5) Continuing to coordinate fully during development.

(6) Accessing ---

(a) Reserve Component assets, i.e., Title 10 (coordinate with Director, Army National Guard Bureau/Chief, Army Reserve) or Title 32 (coordinate with state adjutant general and NGB), for TD support of TATS Courses.

(b) Title 11 assets.

(7) Leveraging distance learning IAW Chapter II-9, Distance Learning.

(8) Maximizing use of technologies:

(a) Exploit existing technological support infrastructure (hardware/software).

(b) Program resources to build future technological infrastructure required.

(c) Invest in digitization as spring board to full multimedia.

Applicable POI and Course Management Plan.

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Tab 3

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Standard 3 Reference Excerpts

DA Pam 611-21, para 11-2, Standards of grade for instructors and advisors.
a. Instructor and advisor positions identified by SQI "H" will be governed by the following criteria and table 11-1 (see attachment).

b. The positions will be classified in the writer, or writer/instructor,11B3H, may be coded in grade SSG , and positions as Instructor/Writer, or Writer/Instructor, MOS 11C4H, may be graded SFC. *Normally, bona fide instructor positions will not be in a rank lower than SSG.*

c. The MOS will be appropriate to the CMF served, or to subject matter specialization.

d. All positions requiring full time instructors or writers will be titled Instructor/Writer, or Writer/Instructor. The principal supervisor for Instructor/Writer, or Writer/Instructor in Directorate of Training and Doctrine (DOTD) and School, Training Departments (DOT) will be titled , Chief Instructor and graded SGM, when authorized. The principal enlisted supervisor for Instructor/Writer, or Writer/Instructor in divisions, DOTD and DOT will be titled Chief, Instructor/Writer, or Writer/Instructor and graded MSG when authorized.

(1) Assistant instructor positions, to include demonstrators, helpers, equipment handlers, and similar positions, will not be identified by special qualifications character "H" and will not be counted as instructor positions in the application of SG for instructors and advisors. A separate grade pattern is provided in table 11-1 for the grading of these assistant instructor positions.

(2) Squad, platoon, and company NCO positions in training companies that provide command, control, administration, and messing , but do not provide training for trainees, will not be classified with SQI "H".

(3) Noncommissioned officer primary leadership development course (PLDC) of instruction for small group leader (SGL) positions may be coded in any MOS (CA,CS,CSS) and identified with SQI "H", or appropriate SQI. The MOS for basic (BNCOC) and advanced (ANCOC) noncommissioned officer course of instruction for SGL will be the same as that of the group they lead and identified withSQI "H", or appropriate SQI, per AR 600-200.

(4) The MOS for PLDC, BNCOC, ANCOC and Sergeants Major Course (SMC) Instructor/Writer positions will be based on subject matter specialization (CA, CS, CSS) and identified with SQI "H", or appropriate SQI.

(5) Use of SQI "H" with the commandant position in a Noncommissioned Officer Academy (NCOA) is not authorized.

AR 614-200, para 6-7, Enlisted assignments and Utilization Management, Scope.
Only the highest quality soldiers will be assigned as instructors or advisers. Normally, soldiers assigned as instructors will hold SQI "H." Soldiers may volunteer or be selected for an instructor or adviser position, as appropriate, at the following:

a. Combat Training Centers (CTC) and TRADOC schools as project warriors (PW).

b. Active Component to Reserve Component (AC to RC) (including full-time manning (FTM)) and Reserve Officers' Training Corps (ROTC).

c. Uniformed service schools.

d. U.S. Army Sergeants Major Academy (USASMA).

AR 614-200, para 6–9, Selection criteria.
The initial selection criteria for instructor duty is as follows:

a. Be a high school graduate or possess the GED equivalent.

b. Have no personal habits or character traits that are questionable from a security standpoint, such as financial irresponsibility, foreign holdings or interest, heavy drinking, drug abuse, gambling, emotional instability, and so forth. Concerning alcohol and drug abuse, persons declared rehabilitation successes under the ADAPC Program should not be included.

c. Possess mature judgment and initiative.

d. Have served at least three years of active Federal service in any branch of the Armed Forces.

e. Have three years time remaining in-service upon arrival at assignment or be able to reenlist or extend to meet the requirement.

f. Have a security clearance consistent with that required to attend the requisite instructor course.

g. Meet minimum reading grade level (RGL) and language grade level (LGL) (measured by Test of Adult Basic Education (see AR 351–1)) required for attendance to the requisite instructor course.

h. Display good military bearing.

i. Meet the body composition requirements in AR 600–9.

j. Be able to pass the Army physical fitness test (APFT).

k. Be fully qualified in the MOS for which instructor duty is desired and have at least one year of experience in that MOS.

l. Have recently held a leadership assignment.

m. Have a demonstrated ability to be an instructor.

AR 614-200, para 6–12, Uniformed service school instructors.
a. In addition to the initial selection criteria in paragraph 6–9, soldiers must—

(1) Be SSG or above; however, exceptions will be considered on a case-by-case basis to secure the best qualified instructors available.

(2) Possess "1" under "S" and "1" or "2" under "E" of physical profile.

(3) Be equal in grade to the level of students that will attend the course.

(4) Be graduates of the course they will instruct.

b. Assignment of instructors at joint or interservice schools will be coordinated with the host service school.

TR 350-18, paras 3-8 & 4-6, The Army School System.

3-8. Instructor grade and experience requirements. DA Pam 611-21, TRADOC Reg 351-10, AR 614-200, and appropriate CMP provide guidance for instructor grade and experience requirements.

4-6. Instructor folders. Instructor folders will be maintained by each TASS battalion and school code. Instructors directed to other TASS battalions/schools/remote training sites will report with a copy of their instructor folder. Instructor folders will be current and contain--

a. Instructor's proponent certification/IPC.

b. Instructor training certificate(s) (or DA Form(s) 1059) for ITC, SGI, VTTITC, as appropriate.

c. Copy of orders or request for orders assigning ASI 5K or SQI 8 or H, as appropriate.

d. Copy of certificates of any civilian training related to the course being taught.

e. Documentary evidence of graduation from the course to be taught.

f. Documentary evidence of appropriate training/experience for the level of the course being taught.

g. Valid DA Form 705.

h. Documentary evidence of meeting the same MOS as the students in the course (as required).

i. Copies of instructor evaluations from the previous 12 months.

j. Appropriate operators permit.

TR 350-70, Systems Approach To Training Management, Processes & Products, paragraph II-1-3g

(1) Training/TD (Task) Proponents

(a) Establish instructor certification requirements for each proponent course.

Note: Certification time cannot exceed the time available to the Reserve Component during one TATS Training Year.

1 Include TAITC, subject matter competence, teaching competence, and other mandated instructor requirements.

2 Specify specific instructor grade levels. (See AR 611-201.)

3 Ensure standardization across components (Active Component, US Army National Guard, US Army Reserve, and DA civilians) for each proponent course.

4 Include technical/tactical recertification requirements. (Proponents should specify the maximum number of years allowed since the instructor last taught the course before the instructor must be re-certified.)

(b) Publish course instructor certification requirements.

Note: These requirements will be included in the CMP when a CMP is produced.

(c) Establish and maintain a chain of command-conducted certification program/board.

(d) Conduct periodic and comprehensive instructor evaluations coupled with an effective remedial program.

Note: See Chapter VI-8, Training Course Development (this regulation).

(2) Chain of Command (Certification Boards)

(a) Ensure instructors meet all course certification requirements.

Note: **Supervisor-written documentation is acceptable for all non-proponent specific requirements.**

(b) Ensure instructor competence through ---

(1) Observation of ability to train course objectives.

(2) Documentation of mastery of course content (observation or recent graduation).

(3) Training battalion/company/detachment/element

(a) Ensure assigned instructors graduate from the TRADOC-approved instructor training course, i.e., the TAITC.

(b) Ensure instructors meet all certification requirements before assigning teaching/facilitating responsibilities.

(c) Maintain quality control of certified instructors. This may require re-certification.

(4) S&F Instructor Training Element.
(a) Award SQI H, SQI 8, or SI 5K as appropriate upon successful completion of TAITC.
Note: Civilian instructors must receive the same or equivalent training.
(b) Maintain student records.
(5) Instructors.
(a) Qualify for award of SQI H, SQI 8, or SI 5K or have equivalent training.
(b) Demonstrate competence by showing mastery of objectives to be trained (as spelled out in instructor certification requirements for each course).
Note: To reduce certification time, performance tests may be used to verify competence.
(c) Fulfill all proponent requirements.
(d) Renew instructor certification if instructor has not taught within the maximum number of years specified for the course by the proponent.
Note: The specific number of years will be specified in the instructor certification requirements for the course.
(e) Demonstrate ability to train course training objectives to chain of command.
(f) Hold grade specified in the instructor certification requirements.
(g) Meet height and weight standards (military only).
(h) Pass Army Physical Fitness Test (military only).

TR 350-16, para 2-8 Annual DS certification. DS assigned to BCT/OSUT units will be evaluated and certified annually on all hands-on phase tasks listed in Supplement 1 of the BCT POI 21-114. DS assigned to AIT units will be evaluated and certified annually on those common tasks selected for reinforcement training and evaluation in AIT, listed in TRADOC Reg 350-6. In addition, DS will be certified whenever changes are made to the BCT/AIT/OSUT POI. IET cadre may be used to administer the certification.

TR 350-10, para2-14b.

b. Small group leaders, SSGLs and instructors will meet specific grade standards. However, during times when a school is short the required number of by-grade SGLs for a course, commandants may use SGLs who are one grade higher than specified. Soldiers not meeting the minimum skill level/grade standards, or more than one grade higher, will not assume SGL, SSGL or instructor duties without prior written approval of the course proponent commandant/CG or their designated representative in the rank of colonel or higher. The following specific course SGL/instructor criteria apply:

(1) Command and General Staff Officer Course—lieutenant colonel or senior major that is CGSOC, or equivalent, graduate.

(2) Captains Career Course—

(a) Branch-specific phase—major or senior captain.

(b) Staff process training phase—lieutenant colonel.

(3) Officer Basic Course (instructor)—captain (command experience preferred).

(4) Warrant Officer Senior Staff Course—Chief Warrant Officer, CW5.

(5) Warrant Officer Staff Course—Chief Warrant Officer, CW4.

(6) Warrant Officer Advanced Course—Chief Warrant Officer, CW3.

(7) Warrant Officer Basic Course—Chief Warrant Officer, CW2.

(8) Warrant Officer Candidate School—Chief Warrant Officer, CW2.

(9) Sergeants Major Course—sergeant major* with prior assignment experience as a sergeant major.

(10) First Sergeant Course—master sergeant with prior first sergeant/detachment sergeant experience.

(11) Battle Staff Noncommissioned Officer Course—master sergeant* with prior unit battle staff assignment experience.

(12) Advanced Noncommissioned Officer Course—sergeant first class* with prior assignment experience in a Skill Level 4 duty position.

(13) Basic Noncommissioned Officer Course—staff sergeant* with prior assignment experience in a Skill Level 3 duty position.

(14) Primary Leadership Development Course—staff sergeant* with prior assignment experience in a Skill Level 3 duty position.

(15) Senior SGL for PLDC, BNCOC, ANCOC–sergeant first class*.

*See DA Pam 611-21, table 11-1. As an exception, a certified PLDC or BNCOC SGL may continue instructor duties for up to 2 years after promotion to sergeant first class (SFC).

TR 350-6, para 3-6, Apx F.

3-6. Lesson plans and instructor preparation.

a. The tasks and subjects in a POI form the basis for each period of instruction. Lesson plans will be prepared by the proponent and kept up-to-date for each period of instruction.

b. Each ATC and school will establish a system for monitoring and improving the quality of instruction. Essential to this is a standardization/certification process to ensure that each instructor is fully qualified and current in all aspects of their subject. This certification will be IAW TRADOC Reg 350-70. All IET instructors will accomplish semiannual physical fitness testing.

c. All IET cadre will accomplish semiannual physical fitness testing. All cadre responsible for conducting instruction and/or evaluating training will be certified on all hands-on phase tasks annually. Cadre in BCT/OSUT units will be certified on those phase tasks listed in the BCT POI and will also accomplish annual weapons qualification. Cadre in AIT units will provide reinforcement training on, and reevaluation of, those BCT common skills tasks selected by the commander. Records of all certification or qualification will be maintained at the battalion level.

Appendix F
Initial Entry Training Cadre/Support Personnel Training Requirements
F-1. Assigned personnel will attend the following IET cadre/ support personnel training as indicated:
a. TRADOC PCC: IET brigade and battalion commanders, and Command Sergeants Major. Brigade/battalion cadre (in key leadership positions such as Executive Officer (XO)/Operations Officer (S-3), as well as brigade UMT members and Training Center IG/Deputy IG, will attend TRADOC PCC on a space-available basis. Branch managers will use the ATRRS to schedule TRADOC PCC attendees.

b. Cadre Training Course: IET company commanders, first sergeants, XOs, company grade staff officers (S1-S4), brigade/battalion operations noncommissioned officers in charge, brigade/battalion cadre (in key leadership positions such as XO/S-3), and IET UMT members and all Training Center IGs who have not attended TRADOC PCC will attend CTC.

c. Support Cadre Training Course: All IET cadre who do not attend PCC or CTC and military and civilian IET primary instructors. The following personnel include, but are not limited to, brigade/battalion/company staff section NCOs, military IET instructors, DoD/DA civilian IET primary instructors, contracted civilian IET primary instructors, unit armorers, unit supply personnel, and RECBN processing NCOs.

d. Installation Staff Contractor's Training Course: All installation staff, medical, dental, and contract personnel, who in the execution of their duties, come into daily or frequent contact with IET soldiers. The following personnel include, but are not limited to, Clothing Initial Issue Point/Central Issue Facility employees, dining facility employees, medical personnel, dental personnel, and other civilian installation personnel (e.g., drug and alcohol representative).

F-2. All IET assigned personnel should attend specified IET cadre/support personnel training prior to but NLT 30 days after assuming their IET duties. Reserve component IET personnel will complete specified support personnel training NLT 120 days after assuming IET duties.

F-3. Commander, Fort Jackson, ATTN: ATZJ-PCC, Fort Jackson, SC 29207-5313, is the proponent for TRADOC PCC, CTC, SCTC, and ISCTC, and is responsible for the instructor certification process and course certification of the approved CTC sites. The following TRADOC installations/units are authorized to conduct CTCs: Forts Benning, Bliss, Gordon, Huachuca, Jackson, Knox, Lee, Leonard Wood, Sill, and the DLIFLC (Monterey, CA). All USAR training divisions are authorized to conduct CTCs.

F-4. All TRADOC installations, TRADOC units on non-TRADOC installations, and USAR training divisions are authorized to conduct SCTCs and ISCTCs. Personnel (to include drill sergeants and former drill sergeants) authorized to instruct IET SCTC and IET ISCTC must be CTC-qualified and certified by their respective TRADOC installation/Division (Institutional Training) commander, or unit commander on non-TRADOC installations.

F-5. TRADOC installation personnel and personnel on non-TRADOC installations will attend CTC in one of the following modes:

a. Resident training at any approved IET CTC.
b. Mobile Training Team from Fort Jackson.
c. When available, TRADOC approved distance learning IET CTC.

F-6. USAR training division personnel will attend CTC in one of the following modes:

a. Resident training at home station approved IET CTC.
b. Resident training at affiliated installation's approved IET CTC.
c. When available, TRADOC approved distance learning IET CTC.
d. Mobile Training Team from affiliated installation.

F-7. Former drill sergeants and cadre/support personnel returning to IET positions after being out of the IET environment for more than 24 months will attend the appropriate training course.

F-8. The Fort Jackson proponent (ATTN: ATZJ-PCC) will host an annual cadre training conference and monitor TRADOC PCC, CTC, SCTC, and ISCTC certification to ensure compliance with this regulation.

F-9. All IET TRADOC installations (to include satellite AIT elements) and IET TRADOC units on non-TRADOC installations are required to report PCC, CTC, SCTC, and ISCTC attendance NLT the last Thursday of each quarter to the Fort Jackson proponent (ATTN: ATZF-PCC). All USAR training divisions will provide required reports quarterly through the USARC, ATTN: AFRC-OP, for collation and forwarding to the Fort Jackson proponent NLT the last Thursday of each quarter. The Fort Jackson proponent will

consolidate all reports, and forward the completed quarterly training report to HQ TRADOC, ATTN: ATTG-IT, within 5 working days.

F-10. The IET CTC is not a replacement for officer and NCO professional development training. Commanders will ensure that regularly scheduled professional development classes are conducted for, and attended by, the IET cadre. These classes are not to be limited to IET issues; they should encompass all aspects of professional development.

F-11. The senior army commander/representative on non-TRADOC installations is responsible for coordination efforts with the non-TRADOC installation commander to ensure compliance with policies prescribed in this regulation.

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TR 350-70
I-2-4. Risk Management

Description a. Risk management as it applies to training development is ---
(1) The process used to identify task and training risks, set values on risk elements, compare risks against training benefits, and eliminate unnecessary risks.
(2) An expression of potential loss in terms of hazard severity, probability, risk level.
(3) Tightly tied to force protection.
(4) A useful tool to help make decisions about hazards causing the risks.

I-2-4. Risk Management

Outputs b. ***Minimum essential requirement:*** Risk assessment codes assigned to appropriate products.

Start Point c. Training developers and trainers must implement the risk management process during the training development process.

TD Phase	Major Activities
(1) Analysis	During task analysis, include a performance step to conduct a risk assessment (as appropriate).
(2) Design	(a) Integrate safety considerations into the design of all training. (b) Identify and include proper/appropriate risk assessment code in the training design and each follow-on lesson plan, program, product, or material. ***Note:*** See Risk Assessment Matrix (this chapter). (c) Coordinate and resolve task and training risk assessment issues with the Branch Safety Manager.
(3) Development	Include the training risk assessment code in all lessons.
(4) Implementation	(a) Ensure staff, faculty, and students adhere to intent of risk management. (b) At a minimum, perform a risk assessment before any non-classroom training or training using equipment.
(5) Evaluation	Ensure risk assessments are conducted and risk levels assigned and included in the appropriate lesson plans, programs, products, and materials.

Procedure d. Risk management is a five-step cyclic process as follows:

Step	Action
(1) Identify hazards	(a) Identify all conceivable hazards prior to the operation. (b) Identify all conceivable hazards associated with performing a task or learning objective.
(2) Assess hazards	(a) Determine the impact of hazards on the training. (b) Determine the probability of a hazard causing a problem and the severity of the consequences should such a problem occur. ***Note:*** Output of this step is a risk assessment describing the impact of the combined hazards. Use Risk Assessment Matrix (this chapter).
(3) Develop controls and make a risk decision	(a) Develop control measures that eliminate the hazard or reduce its risk. (b) As control measures are developed, re-evaluate until all risks are reduced to a level where benefits outweigh potential costs. (c) Make risk decisions at the level of command that corresponds to the degree of risk. Command guidance establishes who makes which decisions. (d) Assign a risk assessment level to each lesson.
(4)Implement the controls	***Note:*** These are the controls developed and established as a result of the previous steps. Included in this step is leader action to reduce or eliminate hazards.
(5)Supervise and evaluate	Follow up during and after the After-Action Review (AAR) to ensure that all went according to plan, reevaluate the training or make adjustments as required to accommodate unforeseen issues, and incorporate lessons learned.

Risk Assessment Matrix

e. Assign a risk assessment level to each lesson using the following Risk Assessment Matrix, extracted from FM 100-14, Risk Management. The training developer will complete the "Probability of Occurrence" columns as appropriate.

Note 1: Controls imposed should normally bring risk down to a medium or low rating.

Note 2 The Branch Safety Manager or designated representative will review all lesson plans and mediate risk assessment level/code if necessary.

Severity Potential of an Injury/Damage if It Occurred	Probability of Occurrence				
LEVEL OF RISK: ***E = EXTREMELY HIGH*** ***H = HIGH*** ***M = MODERATE*** ***L = LOW*** ***USE COMMON SENSE WHEN DETERMINING RATINGS!***	**FREQUENT**	**LIKELY**	**OCCASIONAL**	**SELDOM**	**UNLIKELY**
Severity Potential of an Injury/Damage if It Occurred	**Probability of Occurrence**				
CATASTROPHIC: • Death or permanent total disability, system loss, major property damage. • Loss of ability to accomplish assigned mission.	**E**	**E**	**H**	**H**	**M**
CRITICAL: • Severe injury, permanent partial disability, temporary total disability in excess of three months, major system damage, or significant property damage. • Significantly degrades mission capabilities in terms of required mission standards.	**E**	**H**	**H**	**M**	**L**
MARGINAL: • Minor injury, lost workday accident, compensable injury/illness, minor system damage, or minor property damage. • Degrades mission capabilities in terms of required mission standards.	**H**	**M**	**M**	**L**	**L**
NEGLIGIBLE: • First aid or minor supportive medical treatment, minor system impairment. • Little or no impact on mission accomplishment.	**M**	**L**	**L**	**L**	**L**

Risk Code Approvals

f. Submit ratings for approval as follows:

Note 1: A residual risk cannot be “high” or “extremely high” without the appropriate command approval.

Note 2: Disagreements among the raters concerning risk assessment level assignment may be documented and submitted with the ratings to the approving authority.

I-2-4. Risk Management

Risk Code Approvals

<table>
<tr><th>If the risk assessment is---</th><th>Then associated risk for the lesson must be approved by the ---</th></tr>
<tr><td>Extremely high</td><td>CDR TRADOC
<table><tr><td>Training Proponent Should ...</td><td>• Send requests to ---
HQ TRADOC, ATTN: ATBO-SO
Fort Monroe, VA 23651
• Include supporting documentation and rationale.
• Include Commander's/Commandant's position on risk acceptability.
• Have correspondence signed by the Commander or Commandant.</td></tr></table></td></tr>
<tr><td>High</td><td>Training/Task (TD) Proponent Commander/Commandant</td></tr>
<tr><td>Moderate</td><td rowspan="2">Training/Task (TD) Proponent Commander/Commandant may delegate approval authority for “Medium” and “Low” level risks.</td></tr>
<tr><td>Low</td></tr>
</table>

Completion g. Risk management is never complete. It is a continuing cycle that requires everyone to be constantly alert to training risks and take immediate action to reduce their severity or to eliminate them.

Quality Control h. For quality results from risk management, all personnel involved must ensure ---
(1) All hazards associated with the training of the tasks and learning objectives are identified.
(2) Risk assessment has been conducted on all lessons.
(3) The appropriate risk assessment code has been assigned to all lessons.
(4) Staff, faculty, and students adhere to intent of risk management.

TR 350-70
VI-6-8c. Learning Steps/Activities Descriptive Details, Continued

Examples c. Examples of learning steps/activities are as follows:
(1) Demonstrate an ability to perform the TLO.

Note: This will function as a test with a method of instruction code "TE."

(2) Participate in the performance exercise AAR.

(3) Remain afloat in a swimming pool for 1 hour with the use of a life jacket.

(4) Load an M-16 rifle.

Learning Step/Activity Specifications

d. The training developer identifies or establishes the specifications for each learning step/activity in a lesson. These specifications are the foundation for the lesson plan, establishment of the training schedule, compilation of the program of instruction, and resource acquisition. List the learning step/activities in presentation order. Specifications are as follows:

(1) Method of instruction (see Appendix H, Methods and Techniques for Delivering Instruction.

(2) Instructional media (video tape, IMI, 35 mm slides, etc.) List media name and identification number, if available.

Note: Length and use of full motion video should be limited **ONLY** to when it is absolutely essential to show motion to accomplish the training objective.

(3) Instructional time (in minutes).

(4) Instructor/student ratio.

(5) Instructor and student-to-equipment ratio.

(6) Environmental considerations.

(7) Safety factors and hazards.

(8) Risk assessment code.

Note: See Chapter I-2, Safety and Environment, for environmental, safety, and risk assessment requirements.

(9) Security requirements.

(10) Training resource requirements.

Note: See "Resource Identification" (this chapter).

(11) References required (to paragraph level).

(12) Student handout requirements.

TR 350-6, para 2-14, Risk management. ***Commanders and trainers of IET soldiers will utilize the principles and procedures established in FM 10i0-14, Risk Management.*** Commanders will ensure cadre receive risk management training prior to their assuming sole control over the IET soldier. The risk management process assists commanders in making informed, conscious decisions on eliminating unnecessary risks and in accepting residual risks inherent in accomplishing the mission.

TR 350-6, para 3-21, Prevention of heat and cold injury.
a. Installation commanders will develop and implement detailed programs for prevention of heat and cold injury. TRADOC Reg 350-29, technical bulletin (TB) medical (MED) 507, and TB MED 81 will be used as the bases for locally developed programs. Commanders should also coordinate with the local Medical Department Activity Preventive Medicine Service for assistance in developing their programs.

b. As a minimum, programs will provide the following:

(1) An acclimatization period for new soldiers at the beginning of all training cycles. Initially low exertion levels that increase gradually will mark activity during this period. All soldiers will receive a mandatory briefing or class on prevention of heat/cold injuries as part of in-processing.

(2) A notification system to ensure that each commander, drill sergeant, and instructional committee member knows the current wet bulb globe temperature (WBGT) indexes and wind chill factors. Ensure that one portable WBGT kit (NSN 6665-00-159-2218) per training company (BCT, OSUT, and AIT) is issued. Cadre members will have the pocket-sized graphic training aid (GTA) 5-8-12, or another suitable locally produced GTA, with them during training.

(3) A specific local policy on training activities that may and may not be conducted during the various WBGT indexes/wind chill factors. Policies should include the statement that during cold weather, use of non-standard portable space heaters is prohibited in field training and operations.

TR 350-6, para 3-22. ***Severe weather notification. Severe weather notification plans will be developed, coordinated, and periodically tested.*** These plans will include the requirement for units/activities to acknowledge the receipt of such notification. The organization issuing the warning should maintain a log of the time of notice, receipt of acknowledgement(s), and person(s) acknowledging receipt.

TR 350-6, para 3-24. Safety.
a. Realistic training exercises will be conducted within the bounds of an effective risk management program. Before training, all cadre and IET soldiers will be thoroughly briefed on the risks associated with each specific training event/activity. This will include identification of specific hazards and those controls to be used to reduce the risk of accidents associated with the training event. IET risk assessment will address all applicable safety procedures and potential accident-producing conditions. Unusual vehicle, water, weapons safety considerations, and environmental hazards in training areas will be stressed prior to and during the training. Training cadre will be proactive and aggressive in reducing/preventing training injuries and fatalities.

(1) Each installation will establish standard procedures to ensure that emergency treatment is readily available during training.

(2) TRADOC service schools and major subordinate commands will apply risk management techniques to eliminate or control hazards associated with proponent TSPs IAW guidelines established in TRADOC Regs 350-70 and 385-2. All TSP risk assessments will be reviewed and validated by the safety manager.

(3) Unit commanders will ensure all safety controls identified in the risk management worksheets are implemented prior to the start of training.

(4) The instructor will integrate the appropriate safety/caution statement into each task, and evaluate the performance of the soldiers while they perform the task to the prescribed standard.

(5) All training safety is built on a three-tiered approach (command, leader, individual) to safety.

(a) Tier 1 is commanders' business: validating the structural soundness of the training and evaluation plan for safety, ensuring safety-related matters are addressed, and making risk acceptance decisions.

(b) Tier 2 is first-line leaders' business: considering actions to be taken by responsible individuals, establishing a safety overwatch of training, focusing on adherence to standards, and making risk acceptance decisions within their commander's intent and delegated authority.

(c) Tier 3 is at the individual level - everyone's business: ensuring soldiers look after themselves and others, and know how to recognize unsafe conditions and unsafe acts. Soldiers must meet their individual responsibilities for safety, and be able to recognize and report unsafe acts to leaders.

b. Commanders will also ensure that cadre and IET soldiers are aware of the appropriate procedures for reporting suspicious or adverse incidents during non-training hours. Examples would be (but not limited to) actual or suspected instances of fire, theft, altercations, suicide gestures or attempts, injury, unusual health symptoms, or any other unusual behavior or event.

TR 350-10, para 2-17, Risk management (RM).

a. In accordance with FM 100-14, RM is a five-step process integrated into training decisionmaking to identify and eliminate unnecessary risk by—

(1) Identifying potential hazards that may be encountered during mission or task performance.

(2) Assessing hazards.

(3) Making decisions and developing controls.

(4) Implementing appropriate controls to reduce or eliminate hazards.

(5) Supervising mission/task performance to include evaluating performance to adjust as needed and incorporating lessons learned into future actions.

b. Commandants will—

(1) Adhere to TRADOC risk assessment decision authority levels in all training operations, per TRADOC 385-2, paragraph 4-4.

(2) Establish course safety standards and integrate safety/caution statements, RM decisions, and fratricide prevention actions into appropriate training documents.

(3) Ensure leader course graduates possess the skills and knowledge to conduct high-risk training and operations safely and successfully. Risk management must be integrated throughout all training in such a way as to provide realistic, mission-oriented applications. To achieve the desired endstate, RM must be reinforced, practiced, and individual students evaluated. This will occur through practical hands-on application during the training of common core and branch tasks taught under operational conditions.

(4) Include RM and fratricide prevention in course tests.

c. Safety standards. Leader safety training will include progressive and sequential RM and fratricide prevention training.

TR 385-2, para 4-4, TRADOC Safety Program.

4-4. Systems safety risk management.

a. The IBSO will monitor the development of branch specific material and develop a position on materiel developer's system safety risk assessments (SSRA) for proponent materiel systems and materiel changes IAW the provisions of AR 385-16, appendix B.

b. TRADOC service schools and MSCs will apply risk management techniques IAW AR 385-16 to eliminate or control hazards associated with proponent products. During the design of material systems and training tasks, MSCs will identify, evaluate, and develop a position on the acceptability of the safety risks of residual hazards and formally document risk decisions. Risk decision signature authority is as follows:

(1) CG, TRADOC, retains signature authority at HQ, TRADOC (CG, DCG, CofS) for HIGH risk SSRAs, (Part III, Recommendations by the Combat Developer) IAW AR 385-16, paragraph 1-4m(2), figure-1. The proponent commander or commandant will sign and forward to HQ TRADOC, ATCS-S, his or her position on acceptability of HIGH residual risks. Proponent general officer commanders or commandants have signature authority for the TRADOC position on MEDIUM and LOW risk SSRAs. The proponent commanders or commandants may delegate signature authority for LOW risk SSRAs to the Director of Combat Developments.

(2) In the absence of the person with signature authority, the person designated as acting commander/commandant for a general officer may approve the risk assessment or school position on residual risks.

c. User testing. All tests and pretests involving soldiers require safety releases. Proponents will--

(1) Provide a safety release recommendation and request a user test safety release from U.S. Army Test and Evaluation Command (TECOM), ATTN: AMSTE-ST, Aberdeen Proving Ground, MD 21005-5055, for TRADOC-sponsored Concept Evaluation Programs, customer tests, non-materiel force development tests, and experimentation user tests. (NOTE: TECOM will request all other safety releases.)

(2) Obtain a safety release from the branch safety office prior to pre-test troop training for local tests, experiments, appraisals, and demonstrations involving troops.

FM 100-14, Risk Mgnt: (see Field Manual).

AR 5-355, Defense Traffic Mgnt: (Can't Find).

AR 200-1, Environmental Protection & Enhancement (see Regulation).

AR 200-2, Environmental Effects of Army Actions (see Regulation).

AR 200-3, Natural Resources – Land, Forest, & Wildlife Mgnt (see Regulation).

AR 385-10, The Army Safety Program (see Regulation).

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Standard 5 Reference Excerpts

TR 350-70, para VI-6-3.
Description:
a. Course design translates critical task analysis data into sequential, progressive training. It ---

(1) Is the process used to determine the optimum training strategy for each individual critical task and supporting skills and knowledge.

(2) Is the process used to translate each individual critical task and supporting skills and knowledge into learning objectives.

(3) Ensures the overall efficiency and effectiveness of the total training program/ system.

(4) Identifies all resource requirements.

(5) Establishes ---

(a) How (media/method), when, and where training will be conducted.
(b) Training structure (courses, phases, annexes, lessons, etc.).
(c) Mandatory training sequence.
(d) Unit/student tests.
(e)Graduation requirements.

Outputs:
b. Training course design is a ***minimum essential requirement*** before development of training courses, including correspondence subcourses and courses/lessons using VTT, IMI and TADSS. **Required** training course design outputs:

(1) Designed peacetime and mobilization courses, consisting of **---**

(a) Mandatory training sequence.
(b) Training course length.
(c) Lesson outlines (including learning objectives).
(d) Training resource requirements.
(e) Student Evaluation Plan.
(f) Course Map.
(g) Test items/test design.
(h) Scripts and story boards (as appropriate).

(2) Course Management Plan (CMP).
(3) Compiled POI.
(4) Course Administrative Data (CAD).
(5) Revised ITP.

TR 350-70, Appendix H, Methods of Instruction.

Methods and Techniques for Delivering Instruction

Contents
H-1. Methods of Instruction
H-2. Techniques of Delivery • H-2-1. Instructional Strategies

• H-2-2. Media

H-1. Methods of Instruction. This paragraph provides a general description and other information for each of the important methods of instruction.

Note: TRADOC schools are not restricted to the methods of instruction listed in the following table. When a school identifies another method of instruction, please provide TITLE, DESCRIPTION, and USES information to the HQ TRADOC ATTN: ATTG-CD, for inclusion in this table.

METHOD	DESCRIPTION	USES	INSTRUCTOR/ STUDENT RATIO REMARKS	ABBRE-VIATION
Brainstorming	Students are presented with a problem and develop constrained solutions.	Provides a means for students to develop solutions to unpredictable situations or problems.	Instructor/ facilitator control driven	BR
Case Study	The student is presented a description of a situation and is required to solve problems or identify actions related to the situation.	Provides an excellent means for a student to solve problems either individually or as a member of a group.	Instructor/ facilitator control driven	CS
Conference (Discussion)	Student-centered instruction in which the instructor leads a discussion of the learning objective. Student participation is elicited. The three general types of discussion are as follows: • **Directed discussion ---** The instructor guides the student discussion so the facts, principles, concepts, or procedures are clearly articulated and applied. • **Developmental discussion ---** The instructor guides the discussion to pool student knowledge and past experience to improve the performance of all students. • **Problem solving**	• Prepares students for --- •• Follow-on training. •• The application of theory and procedures to specific situations. • Stimulates interest and thinking. • Develops imaginative solutions to problems. • Summarizes, clarifies, and reviews the learning objective material.	1:25 maximum	CO

	conference --- The instructor uses the conference to find an acceptable answer or solution to a problem. The instructor defines the problem and encourages free and full student participation.			
Demonstration	The instructor and/or support personnel show and explain operation or action to the students. The student is expected to be able to perform the operation or action after the demonstration.	This method of instruction shows how something is done. Some of its more important uses are to --- • Teach --- •• Manipulative operations and/or procedures, e.g., how something is done. •• Equipment operations or functions, e.g., how something works. •• Safety procedures. •• Teamwork, e.g., how people work together to do something as a team. • Illustrate principles, e.g., why something works. • Set workmanship standards.	Equipment/ safety driven	DM
Flight: dual or solo	Used in aviator courses in conjunction with other type of instruction.	See "Practical Exercise" and "Test" below.	Equipment/ safety driven	DF/SF
Gaming	Applies the concepts of a game, i.e., rules, turn taking, winning, and losing to a learning situation. The students "play" the game by	Provides --- • A means for individuals to make decisions, take actions,	Instructor/ facilitator control driven	GA

	obtaining information, making decisions, and taking actions required to accomplish the game objective. Games may be on a board, but with current technology, they will probably be played on a computer. The student may tend to "play" in terms of winning and losing instead of thinking in terms of learning objectives.	and see the results of those actions to accomplish the game objective without killing people or destroying materiel. • Immediate feedback for increased learning. • A means for students to be exposed to determine solutions to unpredictable situations to increase learning. • A means for motivating students.		
Guest Speaker	An individual, other than a member of the normal Staff and Faculty, presents information to support a specific lesson to the class. ***Note:*** Avoid having the speaker present a "Lecture" instead of a discussion-type lesson.	Experts provide information directly supportive of the learning objectives. The most important uses of the guest speaker is to provide --- • Expertise not available within the course staff. • Information based on extensive experience. • Current information. • Motivation.	See discussion or lecture methods.	GS
Lecture	An individual verbally passes information to attending students. Student participation is minimal. It has low training efficiency. It violates all three of the self-paced learning principles. ***Note:*** Dissemination of information in written format is usually more efficient and effective.	Lecture is a means to tell students information they need to know. Some of its more important uses are to --- • Disseminate information that is not yet available in print. • Motivate, e.g., set the stage for a demonstration, discussion, or performance. • Orient.	1:audience	LE
Panel Discussion	A panel consisting of instructors, guest speakers, or a combination discuss material pertinent to the lesson learning objective. The panel presents information	Provides a variety of views and opinions concerning material or problem for which there is no one correct solution.	Instructor/ facilitator control driven	PD

	and responds to student questions.			
Practical exercise (Performance)	Student is required to perform the action required by the learning objective under controlled conditions to the established standard.	The most efficient way to learn to do something is to actually do it. This method of instruction is the best way for a student to learn to perform the required action to the established standard. Examples: operation and repair of equipment; exercises (e.g., field training exercises [FTX]); forms completion. Also, see "CBI."	Safety/ equipment driven	PE
• Hardware oriented	Performance is on actual equipment, to include simulators and training devices.	Used when the actual hardware is available and the risk to individuals and equipment is kept to an acceptable level.		
• Non-hardware oriented	Performance not involving actual equipment, e.g., a paper-based exercise.	Used when the hardware is not required to perform the required actions, e. g., "Plan Convoy Operations."		
Research/Study	Students research/study material in preparation for subsequent course requirements. It is associated directly to specific, identified lesson(s). Research/study is conducted during regular training hours.	Research/Study is used to provide the students the opportunity to locate, analyze, and determine facts, procedures, and concepts on their own.	Instructor control driven	RS
Role playing	Similar to the case study method. The students act out the simulated situation. The student may assume the duties of a staff member in an organization and perform the work of that position.	Provides --- • Simulated experience in the situation being acted out. • A means to assess decision making in a specific role. • Provides opportunities for the student to develop solutions to unpredictable situations and conditions.	Safety and instructor/ facilitator control driven	RP
Seminar	A group, usually guided by an instructor, seeks solutions to problems.	It is primarily used by a group working on advanced studies or a research project to --- • Provide general guidance to the group. • Provide information on techniques and approaches being explored. • Develop imaginative solutions to problems under study.	Instructor/ facilitator control driven	SE

Student panel	Students participate as members of a panel. They discuss material directly related to the lesson learning objective.	Student panels are used to obtain --- • Full student participation in a discussion. • A variety of student views, especially on material directly associated with subject matter expertise. See "Peer Instruction."	Instructor/ facilitator control driven	SP
Study assignment	Assignments are provided to the students that they must complete as either independent or supervised study. This is testable material.	Provides a means to --- • Capitalize on individual differences, thereby improving learning. • Provide enrichment material. • Reduce classroom time.	Instructor control driven	SA
Test • Hardware oriented • Non-hardware oriented	Student are evaluated on the performance of the action required by the learning objective. Performance test is on actual equipment, to include simulators and training devices. Performance not involving actual equipment, e.g., a paper based exercise.	Used to determine if the --- • Students can perform the objectives to the established standards. • Instruction teaches what it is supposed to train.	Safety/ equipment driven	TE
Test Review	After-action review of test with students.	Increases learning.	Safety and instructor control driven	TR
Tutorial	The instructor works directly with an individual student. It includes adaptive instruction, stimulates active participation, and promotes effectiveness and safety.	The primary uses are to --- • Teach highly complex operations. • Provide individual remedial assistance. ***Note:*** See "CBI" (this appendix).	Instructor/ facilitator control driven	TU

H-2. Techniques of Delivery. This paragraph provides a general description and other information for each of the important techniques for delivering instruction. These techniques are listed in two groups for clarification purposes: Instructional Strategies and Media.

H-2-1. Instructional Strategies. These strategies use the Methods of Instruction (Paragraph H-1) and Media (Paragraph H-2-2) to present the lesson material.

Standard 5 Reference Excerpts

TECHNIQUE	DESCRIPTION	USES	INSTRUCTOR/ STUDENT RATIO REMARKS	ABBRE-VIATION
Group-paced Instruction	The training of individuals in a group that moves through the training as a class (in lock-step).	Provides for easy management of students.	See method of instruction used.	
Large Group Instruction	A means of delivering training that places much of the responsibility on the instructor or facilitator for the presentation and management control of the training. The instructor uses various methods of instruction , e.g., discussions, demonstrations, practical exercises.	The large group process provides a means to manage the training method easily. Students are moved through the training as a group with minimal attention to individual training/assistance requirements.	1:25 maximum for effective instruction. Modified downward by method of instruction used.	GP
Small Group Instruction (SGI)	A means of delivering training which places the responsibility for learning on the soldier through participation in small groups led by small group leaders (SGL) who serve as role models throughout the course. SGI uses small group processes, methods, and techniques to stimulate learning. The SGL is an instructor who facilitates role modeling, counseling, coaching, learning, and team building in SGI.	The small group process is a technique for learning in small groups that capitalizes on (uses) student experiences, requires intensive student interaction, and makes each student responsible for his/her own learning. Cooperation takes precedence over competition. A faculty advisor is required. SGI provides --- • Individualized learning. • Team building. • Maximum exchange of ideas.	1:16 maximum. Modified downward by method of instruction used.	SG
Individualized, Self-paced Instruction	The individual completes lessons at his/her own pace. This Instructional Strategy is extremely effective when properly managed. It is the foundation for programmed learning and individual CBI. When used in a formal environment, it frees up instructors to provide 1:1 instruction to individuals needing assistance. This technique does not reduce instructor requirements.	• It is of immense value because it is built on the following three principles: •• Information is presented in small steps. •• Learner is given immediate feedback. •• Learner learns at his/her own pace.	safety/ equipment driven.	IP

		• To be most effective, management controls are put on the time it takes to complete the training and the number of times the learner may take a test to prove mastery of the objective.		
Mentoring	Involves a knowledgeable individual who trains, tutors, and/or guides a subordinate or individual, e.g., a leader mentors subordinates.	Provides direct one-on-one training and guidance to the individual. Provides direct real life, on-the-job experience with that guidance, e.g., an apprenticeship or OJT program.	Mentor control driven.	ME
Peer Instruction	Individuals learn from their peers in a group (team, squad, etc.) when working toward achieving common learning objectives. Students are trained by instructors; then the trained students train other students.	It is useful for team building if properly controlled by the staff. This technique leverages the advantages of individual training, peer pressure, and motivation to achieve a team objective. Peer training is most effective for training job-related individual critical tasks.	Facilitator control driven.	PI
Programmed Instruction	Information is structured to guide the student through the material (paper, CBI, simulation, etc.) depending on the student's response to questions. It is a form of self-paced instruction. Immediate feedback is provided for student responses.	Programmed instruction takes advantage of how we learn. It provides information in small bits, provides immediate feedback, and lets the individual progress at his/her own pace. See "CBI" (this appendix).	Safety or instructor control driven.	PG

H-2-2. Media. These media incorporate various Methods Of Instruction in the lessons and can be presented using the Instructional Strategies listed in paragraph H-2-1 above.

TECHNIQUE	DESCRIPTION	USES	INSTRUCTOR/ STUDENT RATIO REMARKS	ABBRE-VIATION
Computer Based Instruction (CBI)	CBI **is** a means for delivering instruction; it **is not** a method of instruction. It is essentially individualized self-paced or group-paced interactive	CBI is of value for presenting learning material in any situation that will maximize individual or group learning by full use of multiple	See method of instruction used. Instructor/	IC

	instruction combined with multimedia presentations. Interactive instruction is student/group centered performance oriented training that requires students/groups to practice what they learn, receive immediate feedback, and take tests. The priority for interaction is between the student and the equipment/subject matter. In CBI, the computer courseware controls the training content, delivery pace, and learning sequence based on trainee input. The courseware is designed using a variety of methods of instruction to lead the student/group through the learning process.	learning methods. It provides a means of practicing activities without causing damage to individuals or equipment. Each member of the group may have a different role to play. In ***CBI*** - • Information to be learned is presented in small bits. • Learners are provided rapid feedback. • Learners proceed at their own pace within certain limits. • Material presentations take advantage of media benefits. • Exercises/simulations can be repeated many times using/developing different solutions to problems, e.g., "what if" drills. • Students can be exposed to unpredictable situations to maximize learning.	facilitator control is often a major factor if used in an institution.	
Correspondence	Provides a relatively low-cost means for providing a learning opportunity that maximizes student participation. Is usually text based but not necessarily so. The two basic arrangements for correspondence study are as follows: • **Independent study ---** The individual student works alone at a time and place of his/her own choosing. Lesson material designed for individual, self-paced learning is provided by the proponent	• Provides --- •• Learning opportunities to personnel who are unable to attend residence courses. •• Prerequisite instruction for attendance at a resident or other type distributed course. •• "Electives" for students in other fields of study. •• Continuing education		CC

	school. • **Group study ---** The students meet with a group leader available to facilitate the discussions and guide learning toward achieving the learning objective. Tests are usually taken by each student independently.	opportunities. • Supplements on-the-job training.		
Field trip	The students visit a place to acquire information required to support a specific learning objective. The instructor/guide may provide a discourse and/or written material concerning the site. Audio/video tapes may be used at the site.	The primary uses of a field trip are to motivate and to show the relationship between provided information and the reality of the location.	Instructor/ facilitator control driven.	FT
Simulation	Any representation or imitation of reality simulating part of a system, the operation of a system, and the environment in which a system will operate are three common types. There are virtual and constructive simulations.	• Replaces/Complements live training. • Provides the means to safely practice an action or activity under any condition. • Can be used for individual training (e.g., repair of equipment, gunnery) or group training (e.g., fighting a tank or tank company). • May be used in a single computer or distributed over a LAN/WAN to multiple simultaneous users.	Instructor/ facilitator/ observer control and equipment driven.	SI
Simulator	Substitutes for, by emulation, the functions and environment of an actual process, equipment, or system. Any training device, machine, or apparatus that synthetically reproduces a desired set of conditions. Used specifically for training, it is a relatively complete item or training equipment, using electronic/mechanical means	• Substitutes for real equipment, thereby --- •• Saving material and maintenance costs. •• Freeing real equipment for operational use. •• Increasing training safety. ***Note:***	Instructor/ facilitator control driven.	SO

	to reproduce conditions necessary for an individual or a crew to practice tasks/learning objectives. It represents the operational equipment physically and functionally to varying degrees. ***Note:*** A simulation allows for the use of simulations to train/practice tasks and supported missions.	Generally, the higher the fidelity, the higher the transfer of training. • May be used in conjunction with simulations, e.g., a tank simulator with operational simulations presented to the trainees.		
Television	A broadcast or networked television program is a primary technique to deliver the instruction. See video teletraining.	Used to distribute training to a number of students simultaneously. Different methods of instruction may be used to present the material.	See method of instruction used.	TV
Training Aid	Provides a means for reducing the training development/training costs and improving efficiency. Training Aids clarify information and present it in a concise, efficient manner during training, whereas job aids actually replace training.	• Enables trainers to conduct and sustain task-based training in lieu of using extensive printed material or an expensive piece of equipment. • May increase performance as on-the-job training or job aids. • Ranges from quick reference memory aids to battalion simulation games.	Training aid and instructor control driven.	TA
Training Device	Three-dimensional object and associated computer software developed, fabricated, or procured specifically for improving the learning process. Categorized as either system or nonsystem devices. • **System device.** Device designed for use with a system, family of systems, or item of equipment, including subassemblies and components. It may be stand-alone, embedded, or appended. • **Nonsystem device.**	• Provides the means to safely practice an action or activity under any condition. • Substitutes for real equipment, thereby --- •• Saving material and maintenance costs. •• Freeing real equipment for operational use. •• Increasing training safety.	Training device and instructor control driven.	TD

	Device designed to support general military training and nonsystem-specific training requirements.			
Video tape/film	A videotape/film is not a method of instruction. It is used as the primary means to deliver the instruction. The tape/film is introduced verbally or with text. The students are informed as to what they are to learn from the tape/film. Different methods of instruction may be used to present the material, e.g., demonstrations can be used to present information. Film/Video images can be presented in CBI.	Use videotape/film to show action that is too dangerous, cannot normally be observed by the eye, or cannot be readily observed. They are specifically useful for showing --- • Things or actions that are very small or large. • Actions that occur too fast or slow. • Things that are dangerous, such as destroying a bridge.	See method of instruction used.	FI (Film) TP (Tape)
Video teletraining	An interactive transmission vehicle for training delivery. Two types of VTT: • **Broadcast VTT**. TRADOC broadcast VTT consists of two networks: •• TNET equipment and communications are contractor owned and government operated. •• SEN uplinks and studio equipment are government owned and contractor operated; downlinks are government owned and operated.	Used to simultaneously distribute training to a number of students. Different methods of instruction may be used to present the material. Using VTT, proponents can --- • Increase class size and the span of coverage, including OCONUS. • Reach students in remote locations. • Reduce travel and per diem costs. • Provide critical, short-notice training. • Originate training from any network link. • Conduct joint, multiservice, federal, and civilian courses. • Interlink with other DoD, government, and private sector training networks.	See method of instruction used.	VT
	• **Desktop VTT**. This type of VTT is the delivery of instruction by the instructor/facilitator directly to each student's desktop computer. Allows instructor/facilitator-to-student(s) and student-to-student interaction via audio, video, chat mode, and file sharing.		See method of instruction used.	DT

TR PAM 350-70-2, para 4-4, ICW design requirements.
a. ICW must be designed requiring the learner to focus on acquiring the skill or learning the supporting knowledge (information) of the lesson. This is accomplished by structuring the ICW using design components, selected methods of instruction, program and learner controls, and training activities into a concise, efficient and effective training package. Consider the establishment of norms as an integral part of training design. See memorandum, HQ TRADOC, ATTG-CF, subject: Norms for the Army Distance Learning Program (TADLP) Courseware Design.

b. Facilitate learning. The ICW must be designed to facilitate learning by—

(1) Providing a mandatory training sequence and structure that maximizes learning and training effectiveness, ensures learning occurs, and minimizes training costs.

(2) Providing for control of learner progress through the training based on learner's ability and instructional requirements.

(3) Ensuring the appropriate feedback is provided to the student in the context of the learning.

(4) Learning is enhanced and learning transfer occurs.

(5) Incorporating appropriate interactivity.

Note: The course map permits showing a mandatory presentation sequence as well as showing where no mandatory sequence is required.

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TR 350-70, Ch VI-8.

Chapter VI-8
Training Course Development

VI-8-1. Chapter Overview

Introduction

a. This chapter provides policy, guidance, and a top-level view of the development of training courses; training support packages (TSPs); and lessons used in subcourses, video teletraining (VTT), and Interactive Multimedia Instruction (IMI).

Note 1: See Chapter VI-6, Training Course Design, for Total Army Training System (TATS) Course development timeline as well as training course design requirements, e.g., lesson plan and TATS Course design.

Note 2: See Chapters VI-9, Army Correspondence Course Program (ACCP) and VII-3, VTT Program, for further development guidance on respective products.

Note 3: See Chapter VI-3, Individual Task Management: Common, Shared, and Branch, for Common Core TSP development policy.

Chapter Index

b. This chapter covers the following:

Content	Paragraph
Administrative Information	VI-8-2
Training Course Development Description and Requirements	VI-8-3
Total Army Training System (TATS) Course Development Requirements	VI-8-4
Lesson/Lesson Plan Development	VI-8-5
Warrior Training Support Package (TSP): Development and Submission for Individual Training	VI-8-6
Total Army School System (TASS) Battalion Training	VI-8-7
Reserve Component Course Configuration (RC3) Program Description and Requirements	VI-8-8
Course Management Plan (CMP)	VI-8-9

VI-8-2. Administrative Information

Purpose

a. During the development phase of the Systems Approach to Training, the design output is expanded into the products/materials used to implement the training. The training materials required to present formal training are written, reproduced, and distributed. Resources required to

implement the training are acquired, and the staff is trained to implement the training. This development process applies to all types of courses, media and materials used in a training course.

Examples:
- Training Course development, including TATS and distance learning courseware.
- Training Support Packages.
- IMI.

References b. Required references and Internet addresses are as follows:

Regulatory:

(1) AR 351-1, Individual Military Education and Training.
(2) TR 351-18 Total Army School System (TASS).
(3) Other chapters, this regulation:
(a) Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials.
(b) Chapter II-8, Training Requirements Analysis System (TRAS).
(c) Chapter II-9, Distance Learning.

(d) Chapter III-1, Evaluation and Quality Assurance Program Description and Requirements.
(e) Chapter III-3, Product/Material Validation
(f) Chapter V-7, Training Support Package (TSP) Development for Collective/Warfighter (WF) and Warfighter Modernization (WarMod)/Army Modernization Training (AMT).
(g) Chapter VI-3, Individual Task Management: Common, Shared, and Branch.
(h) Chapter VI-6, Training Course Design.
(i) Chapter VI-9, Army Correspondence Course Program (ACCP).
(j) Chapter VII-3, Video Teletraining (VTT) Program.
(k) Appendix E, Lesson Plan, Training Support Package (TSP), and Course Management Plan (CMP) Formats and Components.
(l) Appendix K, TATS Course Checklist.

Procedural: TATS Course Handbook 350-70-TATS.

Internet:

(1) Army Doctrine and Training Digital Library: http://www.adtdl.army.mil
(2) TRADOC Technical Media Standards: http://www.atsc.army.mil/dld/standard.htm

Definitions c. See Glossary for training development (TD)-related terms. Terms specific to this chapter:

TATS Course. It is a single course designed to train the same military occupational specialty (MOS)/area of concentration (AOC) skill level, Skill Qualification Identifier (SQI), additional skill identifier (ASI), Language Identifier Code (LIC), and Skill Identifier (SI) within the Total Army. It also

includes MOS Qualification (MOSQ, i.e., reclassification), Army leadership, functional, professional development, and civilian courses. The course's Total Army structure (phases, modules, tracks***,*** lessons, tests) and media ensure standardization by training all soldiers (regardless of component) on course critical tasks to task performance standard. Course lengths, but not academic hours, may vary due to such differences as Active and Reserve Component (AC/RC) training day lengths.

TSP. A complete, exportable package integrating training products, materials, and/or information necessary to train one or more critical tasks. Its contents will vary depending on the training site and user. A TSP for individual training is a complete, exportable package integrating training products/materials necessary to train one or more critical individual tasks. A TSP for collective training is a package that can be used to train critical collective and supporting critical individual tasks (including leader and battle staff).

Validation. Validation is the process used to determine if new/revised courses and training products/materials accomplish their intended purpose efficiently and effectively. It is the process used to determine if training accomplishes its intended purpose. Validation and revising training are continuous actions in the teaching/revising process of training improvement. Validation of products and materials involves ---

(1) Verification of their training effectiveness in training the objective.
(2) Determination of beneficial improvements in the quality of training products and materials.
(3) Identification of training product deficiencies
(4) Improvement of efficiency, effectiveness, and utility of training objectives, structure, sequence, products, and materials. In the "testing" context, it is the process of determining the degree of validity of a measuring instrument (e.g., skill qualification, end-of-module, and end-of-course comprehensive tests).

Note: Validation is of the training products themselves, **not** the training site.

Responsi-bilities

d. See Appendix B, Responsibilities, for top-level responsibilities. Those responsibilities that specifically pertain to training course development are as follows:

Activity	Responsibilities
(1) HQ TRADOC, Deputy Chief of Staff for Training (DCST) and Deputy Chief of Staff for Education (DCSED)	(a) Develops training/TATS Course development policy, to include lesson plans and TSPs. (Training Development Analysis Activity [DCST, TDAA]) (b) Serves as proponent and develops policy for the maintenance of RC3 Courseware until replacement by TATS Courses. (DCST, Individual Training Directorate [ITD]) (c) Develops and manages Memoranda of Agreement (MOAs) as required for TATS Course as well as DL modules under TRADOC Multimedia Contract development. (DCST, TDAA) (d) Manages DA and DCST Key Enabling Investment (KEI) funding for TATS Course development. (DCST, TDAA) (e) Provides guidance to ATSC on contractual aspects of TATS Course design/development. (DCST, TDAA) (f) Resolves USARC and NBG validation nonconcurrence issues as requested by proponent school. (DCSED)

(2) Commander, Army Training Support Center (ATSC)	(a) Updates and publishes annually (by end of 2nd QTR each fiscal year) TRADOC Technical Media Standards used for developing TATS courseware and products published in the Army Doctrine and Training Digital Library (ADTDL). (b) Assists, as required, proponent schools in writing statements of work (SOWs) for TATS Course as well as DL modules under TRADOC Multimedia Contract development. (c) Provides guidance as requested by Training/Task (TD) Proponents in the development of exportable TATS Courses and RC3 courseware errata sheets. (d) Manages for the DCST the replication and distribution of training products/materials for TASS Training Battalions to meet training start date requirements as required. (e) Manages common core TSP development; coordinates shared task TSP development. (f) Manages for the DCST the reproduction and distribution of common/shared task training products. 1 Coordinates and schedules delivery and publication. 2 Replicates, stores and distributes products. 3 Uploads approved product(s) into the ADTDL. (g) Ensures correct format, TSP completeness (all required components), and product compliance with automation standards of for TATS Course and common task TSPs prior to upload into the ADTDL (or installation DTAC upon standup). (h) Until standup of installation Digital Training Access Centers (DTACs), uploads approved TATS Courses into the ADTDL; after DTAC standup, uploads approved TATS Courses name to the ADTDL course list.
(3) Commanders/ Commandants Training/TD (Task) Proponents	(a) Staff MOAs as required for TATS Course and DL module development as required. (b) Obtain 06 or general officer signature on TATS Course MOAs as appropriate. (c) Develop SOWs for TATS Course and DL module development as required.

Responsi- (continued)

bilitie	**Activity**	**Responsibilities**
	(3) Commanders/ Commandants Training/TD (Task) Proponents (continued)	(d) Ensure training courseware development/revision is entered into the workload management database (currently the Automated Systems Approach to Training [ASAT], Resource Management menu option). (e) For TATS Courses, coordinate with **National Guard Bureau (NGB)**, Training Division, and **Headquarters, U.S. Army Reserve Command (USARC)**, Individual Training, **through the Deputy Assistant Commandant (DAC) (ARNG or USAR) or Total Force Integration Officer (TFIO)**: 1 **For SME support** from functionally aligned TASS Training Battalions: a Revised job and task analyses. b Course design and development. c Courseware validation. ***Note:*** "Distance TD" is a possibility to avoid travel costs. 2 **For concurrence**: a Proposed TATS Course Structure (including Common Core) and supporting narrative. b TATS Course POI. ***Note:*** Maintain agency coordination sheets and documentation summarizing resolution/non-resolution of Proposed TATS Course Structure, POI, and validation issues. Final course documentation forwarded to HQ TRADOC (DCST, Training Operations Management Activity [TOMA]) will contain copies of coordination results. (f) Develop --- 1 Training course products/materials using the analysis data and design output. 2 A TSP/lesson plan for critical common and shared tasks for which they are the training proponent, using the format provided in Appendix E, Lesson Plan, TSPs, and CMP Formats and Components, and IAW HQ TRADOC-provided procedural guidance. 3 A TATS Course using Total Army Course Structure/ Media to ensure training of all soldiers to perform to task performance standard (unless DCST grants exception.) 4 DL lessons/modules IAW Chapter II-9, DL. 5 Courseware IAW: a TRADOC Technical Media Standards. b Copyright requirements in Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/Proprietary materials. 6 Courseware in the structured writing format when feasible. (g) Identify and minimize training risks, to include --- 1 Guidance to minimize adverse environmental impact while maintaining realistic training. 2 Safety and environment considerations in all courses. (h) **Will not** modify the TSP or lesson plan structured writing format included in Appendix E without approval from DCST, TDAA. Approval will not be granted without compelling justification. Previous exemptions are invalid.

(3)Commanders/ Commandants Training/TD (Task) Proponents (continued)	(i) Apply appropriate classification markings as well as FD restriction statements to each TSP/lesson/lesson plan containing classified military information (CMI) and controlled unclassified information(CUI) IAW Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/Proprietary Materials. (j) Submits common task and TATS Course TSPs to ATSC for compliance with automation standards prior to upload into the ADTDL. (k) Submit shared and common task TSPs to ATSC for reproduction and distribution IAW HQ TRADOC (DCST, ITD) milestones. (See Chapter VI-3, Individual Task Management: Common, Shared, and Branch.) (l) Validate training courses with target audience. For TATS Courses, coordinate with NGB and USARC **through the DAC (ARNG or USAR) or TFIO** for SME support. (m) Approve proponent-developed courses and courseware, to include Common/Shared Task TSPs, Training/TATS Course TSPs (and components there of), as well as training products that are not part of an approved course. ***Note 1:*** Commander/Commandant approves TATS Courses upon recommendation of DAC (ARNG or USAR) or TFIO. ***Note 2:*** Approval follows --- • Validation. • ATSC verification of compliance for format, completeness, and TRADOC Technical Media Standards. (n) Ensure training products, literature, and materials containing sensitive but unclassified (SBU), CUI, and copyrighted information are properly identified and have the appropriate lock-outs before uploading on the internet or DTAC. (o) Use the TATS Course Checklist (Appendix K) before forwarding TATS Course TSPs to ATSC for upload on the ADTDL or before uploading onto the installation DTAC. (p) Upload approved TSPs, training courses, and course materials on the installation DTAC upon standup; until DTAC standup, forward approved TATS Course TSP to ATSC for upload into the ADTDL. (q) Maintain currency of all training courses and TSPs, including all components thereof. (r) Ensure availability of current training products and material for access by all training sites. (s) Develop TATS Courses to replace RC3 TSPs for export to TASS Training Battalions. (t) Incorporate the TSP into their training as per HQ TRADOC/ proponent-provided TSP guidance. (u) Train TSP material to the proponent-established standard. (v) If integrated, record lesson in which the TSP is integrated.

VI-8-3. Training Course Development Description and Requirements

Description a. Course development is the process used to convert the course design into the
training products and materials required to implement the course. The lesson outline is the basic building block of all training. It may be completed as a lesson plan for formal institutional training or as a lesson in a correspondence course or distance learning product. A training course consists of ---

(1) Common/Shared Task TSPs (as appropriate).
(2) Lessons (instructor-led or self-paced, e.g., IMI).
(3) Tests.
(4) Student Handouts.
(5) Supporting products, including audiovisual media products, e.g., video tapes, audio tapes, photographs, etc.

Outputs b. **Minimum essential requirements** for training course development are as follows: (1) Validated, approved training courses and course materials, such as ---

(a) TSPs.
(b) Detailed lessons and lesson plans.
(c) Final, ready-to-use media products, e.g., photographs, 35mm slides, videotape, maps, etc.
(d) Criterion-referenced performance tests.
(e) Practical exercise/laboratory assignment sheets.
(f) Home study assignment sheets.
(g) Study guides.
(h) Student workbook.
(i) Information sheets.
(j) CMP.

(2) Validated, approved subcourses/modules or correspondence courses.
(3) Trained instructors/facilitators/staff in instructional and implementation procedures as appropriate to method/type of instruction and media.

Start Point c. Training courses, TSPs, as well as subcourse, VTT, and IMI lessons can be developed to support new jobs or revised as necessary.

(1) **New:** Training course, TSP, and lesson development begins with receipt of training course design outputs.
(2) **Revised:** Minor training course, TSP, and lesson revisions occur as necessary to ensure current and correct course material. Revisions may also be the result of a formal needs analysis or a completely revised course, e.g., for TATS Courses.

Note 1: A course is considered obsolete and in need of major revisions when over 30% of course lessons require revision. Also, these lesson revisions would result due to task performance changes that threaten survivability/mission accomplishment or that result in a major environmental or safety impact.

Note 2: Design and development are **normally accomplished sequentially.** They can sometimes be accomplished **simultaneously** or **concurrently** to save production time. This is especially true when producing a small stand-alone training product, such as a TSP for a single common task.

Procedures d. Developing a training course involves converting the training course design into the material required to implement the course. The general course training development steps are as follows:

Step	Action
(1)	Maintain the design/development team.
(2) (3)	Acquire and study the task analysis and training design data. Obtain instructor contact hours (ICH) (i.e., instructor requirements) validation from TRADOC Management Activity (TMA).
(4)	Complete the lesson plan or lesson, i.e., fill in the lesson outline (design output) with all the details required to implement the instruction. ***Note:*** See Chapter VI-6 for lesson outline guidance and Appendix E for lesson plan format (this regulation).
(5)	Write the student handout and assignment materials. ***Examples:*** • Information sheet. • Student workbook. • Study guide.
(6)	Complete production of any required IMI and audiovisual media products. ***Note:*** Visual Information Specialists and audiovisual production personnel may be involved in this action.
(7)	Produce instructor-required media. ***Examples:*** • Overhead transparencies. • Graphic Training Aids. • 35mm slides.
(8)	Compile tests.
(9)	Validate training products/materials.
(10)	Obtain school commander/commandant approval. For TATS Courses, commander/commandant approval is at the recommendation of the Deputy Assistant Commandant (ARNG or USAR) or Total Force Integration Officer.
(11)	Acquire required training resources.

(12)	Train the instructors/facilitators/staff in instructional and implementation procedures as appropriate to method/type of instruction and media.

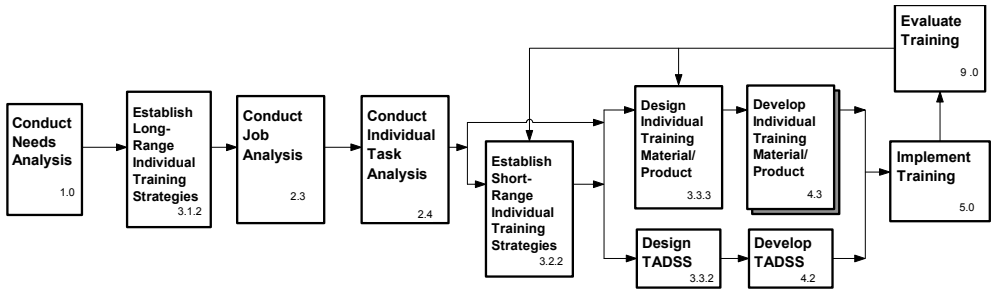
Process Completion (All Training Courses and Supporting Products)

e. Development is completed when the appropriate proponent command authority approves all training courses and supporting products for implementation. For detailed guidance, see "Total Army Training System (TATS) Course Development Requirements," "Lesson/Lesson Plan Development," "Warrior TSP: TSP Development for Individual Training"; and "Course Management Plan (CMP)" completion requirements in this chapter.

Note: Until standup of Digital Training Access Centers (DTACs), ATSC uploads approved TATS Courses and supporting products into the ADTDL. Upon standup of DTAC, proponent uploads the products into the DTAC. Proponent is responsible for maintaining currency of training course products.

Process Flow

f. The relationship between development and other TD phases is as follows:



Quality Control

g. For quality developed course products/materials, each involved individual must ensure ---

(1) Development is consistent with the analysis data and design outputs.

(2) Products are in compliance with TRADOC Technical Media Standards.

(3) Products are in compliance copyright requirements in Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/Proprietary Materials.

(4) Products meet format requirements in this regulation.

(5) Each test and test item meets testing standards. See Chapter VI-7, Student Performance Measurement/Testing.

(6) Content is doctrinally and technically accurate.

(7) Safety, risk, and environmental factors and considerations are incorporated.

(8) Deficiencies are identified and corrected.

VI-8-4. Total Army Training System (TATS) Course Development Requirements

Introduction

a. This paragraph provides training course policy and guidance specific to TATS Course development.

Note 1: Initial TATS Course redesign focuses on existing comparable AC and RC courses that are being redesigned as a single course meeting the training needs of the Total Army.

Note 2: Officer Basic Courses (OBCs) and Warrant Officer Basic Courses (WOBCs) as well as initial entry and initial active duty training (IET/IADT) (which includes Basic Combat Training [BCT], Advanced Individual Training [AIT], and one-station unit training [OSUT]) are considered TATS Courses as they are "one-of-a-kind" courses attended by AC/RC soldiers at the same applicable AC training sites.

Note 3: See Chapter VI-6 for exceptions to TATS Course design requirements: TATS Training Year and Total Army Course Structure/Media.

Use

b. As TATS courses can consist of one or more phases, modules, and media,
they can be used in a number of training sites. Training proponent schools and TASS Training Battalions manage the training of TATS Courses. Validated modules/media within TATS Courses can be used by the soldier in his unit, home, or TASS Training Battalion.

TSPs Contents

c. A TATS Course TSP can contain a variety of components, depending on the user of the particular modules. See "Training Support Package (TSP) Development for Individual Training" (this chapter) and Appendix E.

TATS Course Management

d. Manage TATS Course ---

(1) Resourcing through the proponent school Command Operating Budget (COB). See Chapter II-2, TD Workload and Resource Management. Proponents may apply to the DCST (ATTG-CF) for available distance learning resources.

(2) TRAS documentation IAW Chapter II-8, TRAS.

(3) Revision/Development in the automated TD workload management database (currently the Automated Systems Approach to Training [ASAT], Resource Management menu) IAW Chapter II-2, TD Workload and Resource Management.

Note: See other TATS Course management functions in Chapter VI-6, Training Course Design, "TATS Course Design Requirements."

Development/ Requirements

e. TATS courses are developed ---

(1) For new course requirements and for replacement of existing AC/RC3 courses.

Note: Proponents should continue minor revisions to existing AC and RC3 courses using errata sheets.

(2) Based on TATS Course design, considering reclassification training requirements, resource constraints, and RC training and equipment constraints.

Note: See Chapter VI-6, Training Course Design, "TATS Course Design Requirements."

(3) Within a TATS Training Year and using a Total Army Course (phases, modules, tracks, lessons, tests) and media to ensure training of all soldiers to perform to task performance standard unless exception is granted by the DCST. See Chapter VI-6, Training Course Design, "TATS Course Design Requirements."

(4) Following procedures in the following paragraphs, this chapter: "Training Course Development Description and Requirements," "Lesson/Lesson Plan Development," and "TSP Development and Submission for Individual Training."

(5) Continuing to coordinate fully during development.

(6) Accessing ---

(a) Reserve Component assets, i.e., Title 10 (coordinate with Director, Army National Guard Bureau/Chief, Army Reserve) or Title 32 (coordinate with state adjutant general and NGB), for TD support of TATS Courses.

(b) Title 11 assets.

(7) Leveraging distance learning IAW Chapter II-9, Distance Learning.

(8) Maximizing use of technologies:

(a) Exploit existing technological support infrastructure (hardware/software).

(b) Program resources to build future technological infrastructure required.

(c) Invest in digitization as spring board to full multimedia.

Validation

f. Chapter II-8, Training Requirements Analysis System, provides policy for TRADOC Manpower Agency validation of training courses. Policy for validation of a TATS Course as a product is in Chapter VIII-3, Product/Material Validation. This validation of the redesigned TATS Course determines its suitability and supportability of both AC and RC unique requirements. Resident course validation may be conducted during the first three iterations to save time and resources. However, non-resident DL modules must be validated prior to reproduction and distribution. Discrepancies must be thoroughly coordinated and resolved with all concerned parties/audiences prior to full implementation. Proponents are responsible for validation of all TATS courseware as follows:

(1) Coordinate courseware validation and validation results within the proponent school.

(2) Coordinate with **NGB**, Training Division, and **USARC**, Individual Training, **through the DAC (ARNG or USAR) or TFIO for SME support**. TASS SMEs will support validation of the course, to include specific tracks relevant to the target audience, e.g., equipment fielding.

(3) Ensure training can be accomplished within the TATS Training Year (unless exception was granted IAW Chapter VI-6); courseware meets Total Army Course Structure/Media requirements (unless exception was granted IAW Chapter VI-6); courseware includes training on critical tasks for the job being trained only; and courseware is useable by target audience at all training sites.

(4) Resolve NGB and USARC issues concerning validation results; forward unresolved issues to DCSED through DCST, TDAA.

Note1 : USARC and NGB may extend course start date due to validation constraints or issues.

Note 2: Validation is of the training products themselves, **not** the training site.

TATS Course Completion

g. The TATS Course is complete following validation upon approval of the school commander/commandant at the recommendation of the Deputy Assistant Commandant (ARNG or USAR) or Total Force Integration Officer, as appropriate, and subsequent fielding of courseware. See more details in "Warrior Training Support Package (TSP): TSP Development and Submission for Individual Training," this chapter.

Quality Control

h. For quality training, the personnel involved must ensure ---

(1) TATS courseware ---

(a) Is the most effective and efficient means for training the critical tasks, as determined by the individual training design process.

(b) Trains all course critical tasks to standard, regardless of the media/method used.

(c) Is validated by the target audience during the design and development processes, i.e., do not wait for fielding of entire course. This will ensure hardware requirements are available to using units before development of the courseware is too advanced.

(2) TATS TSPs are complete (contain all components and courseware) before forwarding for reproduction or distribution.

(3) TATS Courses meet TATS Training Year and Total Army Course Structure/Media requirements or have approved exceptions to policy.

(4) TATS Course TRAS documents have been submitted in a timely manner.

VI-8-5. Lesson/Lesson Plan Development

Description

a. The lesson outline is the basic building block of all training. It is designed to facilitate learning and includes all the details required for the presentation. A lesson outline (described in Chapter VI-6, Training Course Design) may be completed to become an instructor or SGI-presented lesson plan or a self-paced lesson, such as a lesson in a correspondence course or IMI lesson.

If the instruction is to be ---	Then develop a ---
(1) Presented by an instructor for formal institutional training	Lesson plan. The developer adds as much detail as needed to allow any new instructor to use this lesson plan with no degradation of training and with minimum preparation time. Additionally, the media products for instructor use are produced. ***Note:*** IMI facilitated by the instructor requires a lesson plan.
(2) Used directly by the student	Self-paced lesson (e.g., lesson for correspondence course, programmed text, or IMI) so the student can meet the learning objective standard without the assistance of an on-site instructor.

Note: A stand-alone lesson may be **designed and developed simultaneously** if it is not designed to build on or reinforce previous training. A lesson, as an integral part of a course, must be designed first, then developed to ensure sequential, progressive training.

Outputs

b. The primary lesson/lesson plan development outputs are ---
(1) Approved self-paced lesson and supporting media/materials for student use, e.g., correspondence course, IMI.
(2) Approved lesson plan(s) for instructor/course manager use.

(3) Home study and other student assignments ready for issue to the students in support of instructor-led instruction.
(a) Practical assignment sheets.
(b) Student handouts.
(c) Home study assignments.
(4) Media training products ready for use in the training course, e.g., 35mm slides, overhead transparencies, video tape.
(5) Criterion tests and practical exercise guidance.

Standard Format

c. The lesson plan format has been standardized. Student self-paced lessons, usually CBI, are not standardized but must follow the lesson outline (see Chapter VI-6, Training Course Design, "Lesson Outline").
(1) Use the standardized lesson plan format in Appendix E.
(2) Use the HQ TRADOC TD automation system (currently ASAT) to develop the lesson plan.

Note: Proponents requesting exceptions to lesson plan format for development of new lessons must receive DCST, TDAA approval; permission previously granted is no longer valid. For resource conservation, lesson plans should not be modified to the new format until course redesign requires new lessons.

Standard Lesson Number

d. The standardized Lesson Number (i.e., POI File Number) is as follows:

n n n n - n n n n n n n n	**n n n n** = Proponent School Code **n n n n n n n n** = ***Numeric*** characters to uniquely ID lesson.

Note: Do not add a "0" to fill in the fourth space. If your code has 3 numbers, use 3 via the ASAT pick list only.

Start Point

e. Lesson/lesson plan development starts with the receipt of the lesson outline. See Chapter VI-6-9, Training Course Design, "Lesson Outline."

Lesson/ Lesson Plan Procedure

f. Follow the procedure below when developing a lesson and a lesson plan. All the steps apply to lesson and lesson plan development unless specified.

Step	Action
(1)	Acquire the lesson outlines.
(2)	Acquire the task analysis data for the tasks and/or supporting skills and knowledge to be trained in the lesson being developed.
(3)	Write the contents of the learning steps/activities --- (a) To support learning to accomplish the learning objective. (b) That are absolutely required to accomplish the learning activity. (c) With sufficient detail that the user can accomplish the learning objectives.

If writing a ---	**Then ---**
1 Lesson plan	A new or substitute instructor must be able to present the material without degradation of training and with minimum preparation time.
2 Lesson	The student must be able to learn the material without the assistance of an on-site instructor.

Note 1: The detail required depends on the teaching situation. If a ---

- Lesson plan is designed and developed by one team and presented at a number of locations, the detail must be relatively extensive. A lesson plan can have less detail if presented by the design/development team.

Lesson/ Lesson Plan Procedure (continued)

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>(3)</td><td colspan="2">Note 1: (continued)
• Lesson is designed and developed as a paper product, it must be relatively extensive. It may reference other documents, such as a technical manual or field manual.
Note 2: The degree of technical difficulty will also affect the detail required. Technical manuals, such as those used in aviation maintenance, should not be duplicated; refer to specific TM paragraphs as appropriate.
(d) List the detailed information in teaching sequence order.
(e) Use paragraphs (optional).</td></tr>
<tr><td>(4)</td><td>For a lesson plan</td><td>Where appropriate, write "NOTES:" to provide necessary instructor information or actions. Include as many "NOTES" as needed to provide adequate "how-to" information for a substitute instructor. Place the "NOTE:" as a separate paragraph in the lesson body where the event should take place.</td></tr>
<tr><td>(5)</td><td colspan="2">Write a short motivator that ---
(a) Provides relevance and significance to the lesson.
(b) Gains student interest and focuses them on what they are about to learn.
(c) Explains why the student needs to perform the learning objective and what the consequence of nonperformance is.
(d) Explains the actual job or battlefield conditions that would make learning the TLO essential for the student.</td></tr>
<tr><td>(6)</td><td colspan="2">Provide details of what the student is to learn from any instructional medium (e.g., video tape, audio tape) to be used during the lesson.</td></tr>
<tr><td>(7)</td><td colspan="2">Add (in bold type) cautions, warnings, and danger notices as appropriate. Check with the safety officer for current terminology.
<table>
<tr><td>CAUTION</td><td>Notice should alert users to the possibility of personal injury or damage to equipment that may result from long-term failure to follow correct procedures.</td></tr>
<tr><td>WARNING</td><td>Notice should alert users to the possibility of immediate personal injury or damage to equipment.</td></tr>
<tr><td>DANGER</td><td>Notice should alert users to the possibility of immediate death or permanent injury. Although damage to equipment may occur, the major concern is the probability of death or permanent injury if the warning is ignored.</td></tr>
</table></td></tr>
</table>

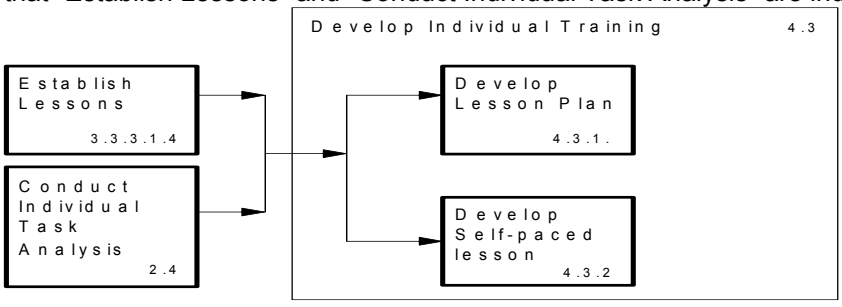
(8)	**For a ---**	**Then ---**
	Lesson plan	Write details for "Check on Learning" as appropriate.
	Self-paced lesson	1 Build in "Check on Learning" as appropriate. 2 Provide remedial training for incorrect responses to “Check on Learning” questions/exercises.
	Note: A "Check on Learning” is an informal, required check to determine if students are learning. It can be as simple as asking one or two review questions or as complex as asking students to demonstrate skill performance.	
(9)	**For a ---**	**Then ---**
	(a) Lesson plan	1 Write a full description of the test, details on how the student will perform the test, special requirements, and grading criteria. 2 Provide remedial training for incorrect responses to test questions/exercises.
	(b) Self-paced lesson	Build in --- 1 Tests IAW with the design. 2 Remedial training for incorrect responses to test questions/exercises.
	Note: See Chapter VI-7, Student Performance Measurement/Testing.	
(10)	Comply with copyright requirements and apply appropriate classification markings as well as appropriate foreign disclosure (FD) restriction statements to TSP and lessons/lesson plans IAW Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials.	
(11)	Obtain appropriate command authority approval.	

Lesson Completion

g. The lesson/lesson plan development is considered complete when approved by the appropriate command authority.

Process Flow

h. General information flow for lesson/lesson plan development is as follows. Note that “Establish Lessons” and “Conduct Individual Task Analysis” are independent actions.



Quality Control

i. For a quality lesson/lesson plan, each involved individual must ensure ---
(1) Development is consistent with the training design and analysis data.

(2) Technical accuracy of content.
(3) Training is feasible, cost-effective, sequential, and progressive.
(4) Learning sequence is effective.
(5) Identification and correction of deficiencies.
(6) Incorporation of safety, risk, and environmental factors and considerations.

VI-8-6. Warrior Training Support Package (TSP): Development and Submission for Individual Training

Description a. A TSP for individual training is a complete, exportable package integrating training products/materials necessary to train one or more critical individual tasks. It could be a package for an entire course or for a single task and can be trained at training site(s) other than the development location. These sites could be an AC school, a TASS Training Battalion, a unit, or a distance learning site/an individual's home.

Note 1: See Chapter V-7, TSP Development for Collective and WarMod/AMT, for further information on specific types of collective TSPs.

Note 2: See Chapter VI-3, Individual Task Management: Common, Shared, and Branch, for Common/Shared Task TSP development, management, and distribution.

Note 3: See Appendix E, Lesson Plan, TSP, and CMP Formats and Components, for Common/Shared and Training/TATS Course TSP formats and components.

Outputs b. Warrior TSPs are a **minimum essential requirement** if identified as a requirement during needs analysis or short-range individual training strategy. The primary individual TSP development output is an approved, validated TSP containing all the material required to implement the training at the training site. Its contents will vary depending on its type/use.

TSP Uses c. The term "Warrior TSP" denotes the concept of future, computer-generated TSPs for individual training. A Warrior TSP is a package of training products/materials necessary to train one or more critical individual tasks anywhere in the world, to include in the institution, at the unit, or in a soldier's home. Training may be conducted using formal instruction, self study, or distance learning in a live, virtual, or constructive environment. Its automated components allow access of critical individual (including leader and battle staff) task specifications in support of Warfighter and Warfighter Modernization (WarMod) TSPs.

(1) Definitions and components of existing TSPs used for individual training to be automated in the future in support of Warrior XXI are as follows:

Uses	Definitions and Components
(a) Common or shared individual task TSP	A TSP for one or more common or shared tasks. It --- 1 Includes --- a Administrative information/Instructor guidance. b Lesson plan or plans. c Instructor-used media. d Training map (mandatory training sequence - if multiple lessons). 2 Can be used for presenting programmed, refresher, or integrated training. ***Note:*** See Chapter VI-3, Individual Task Management: Common, Shared, and Branch
(b) TSP for individual task trained in unit	A TSP prepared by the proponent school for a critical individual task selected during the media selection process for training at the unit. It contains all guidance/material needed to train the task, to include --- 1 Administrative information. 2 Trainer guidance. 3 Training materials.
(c) RC3 TSP	A package of course training material configured (redesigned) from AC resident courses. TATS Course TSPs will replace RC3 TSPs.
(d) Training/ TATS Course TSP	Contains all guidance and materials needed to train all critical tasks of a particular course to the Total Army. ***Note:*** See Appendix E, Lesson Plan, TSP, and CMP Formats and Components.
(e) TADSS TSP	A complete package integrating all training products/materials necessary to train one or more individuals in the operational use and/or maintenance of a TADSS. See Chapter V-7, TSP Development for Collective and WarMod/AMT, for TADSS TSP components and requirements.
(f) Awareness Training TSP	Contains all the materials and guidance required to implement the awareness training. This package may include --- 1 Formal lesson material. 2 Supplemental reading. 3 Audiovisual material (video tape, overhead slides, etc.). 4 Administrative information. 5 Handouts. 6 Posters.

TSP Uses (continued)

(2) Another future concept for TSPs is the WarMod TSP. It is a package of training products/materials used to initially train individual operator/maintainer/repairer, battle staff, or collective tasks for new equipment/systems. It provides the means to deliver training anywhere in the world, to include in the institution, at the unit, or at the contractor facility. Training may be conducted via formal instruction or distance learning in a live, virtual, or constructive environment. It will be used for Instructor and Key Personnel Training (IKPT) and may include doctrine, tactics, techniques, and procedures training. See Chapter V-7, TSP Development for Collective and WarMod/AMT, for WarMod TSP components and requirements.

Start Point d. TSP development starts with the receipt of the TSP design.

Note: The TSP design and development functions are normally conducted simultaneously for a stand-alone lesson that is not designed to build on or reinforce previous training. A TSP that contains multiple lessons must be designed first, then developed to ensure sequential, progressive training.

Development Procedure e. TSP development primarily consists of packaging the material to be presented as a complete, comprehensive training package. The general steps to follow are shown in the following table. This is just top-level guidance. The specific procedures to follow for any included product are in the pertinent product chapter (this regulation).

Step	Action
(1)	Acquire the design material.
(2)	Acquire the task performance specifications for tasks to be trained.
(3)	Develop/acquire the included training product(s).
(4)	Add administrative details.
(5)	Staff TSP with personnel and activities as appropriate for the type and content of TSP.
(6)	Obtain appropriate command authority approval.
(7)	Prepare the Camera Ready Copy (CRC)/master for reproduction.
(8)	Arrange for reproduction and distribution.

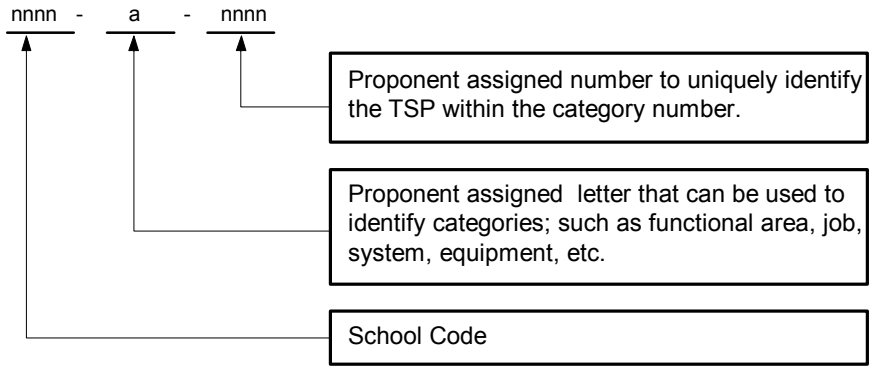
Standard Format f. Appendix E shows the standardized format for Common/Shared Task and Training/TATS Course TSPs as well as lesson plans.

If you are developing a ---	Then ---
(1) Common/shared Task TSP	Attach the lesson plans to the TSP introduction pages. See Appendix E, paragraphs E-1 and E-2.
(2) Training/TATS Course TSP	(a) Resident training lesson plans

	will be in the standardized format. (b) Distance learning lessons (if applicable) will be in accordance with "Lesson/Lesson Plan Development" guidance (this chapter).
(3) TSP for --- (a) Individual task(s) trained in units ***OR*** (b) A training aid, device, simulator, or simulation for resident training	Be creative. Provide the information needed in the most efficient and effective manner possible.

Common/ Shared TSP Number

g. The TSP number positively identifies each TSP. TSP proponents number their TSPs as follows:



Example: 131 - T - 0001

Note: Retire a TSP number for at least 5 years before reuse.

Training/TATS Course TSP Number

h. Training/TATS Course TSPs use the course number and title instead of a separate TSP number.

TATS Course and RC3 TSP Submissions

i. Submit new and revised TATS Course TSPs and errata sheets for minor RC3 course revisions (including commissioned and warrant officer courses) to ATSC (ATTN: ATIC-DLC-T), USARC, and NGB 12 months before course start date.

(1) ATSC approves TSP for format, completeness (all required components), and compliance with the TRADOC Technical Media Standards.

(2) USARC and NBG begin the validation process with the proponent school.

TSP Completio

j. The TSP development is considered complete ---

For a ---	**By the ---**	**When ---**
(1) Common or shared task TSP	(a) Proponent school	The electronic Camera Ready Copy is accepted by ATSC for reproduction.
	(b) ATSC	Distributed.
(2) Training/ TATS Course TSP	(a) Proponent school	1 Proponent **validates** the TSP; school commander/commandant **approves** the course at the recommendation of the DAC **(ARNG or USAR)** or TFIO, as appropriate; and proponent **submits** TSP to ATSC **for upload** in the ADTDL. ***Note:*** Upon DTAC standup at installations, • Proponent schools will upload their approved courses directly onto their installation DTAC. • ATSC adds course name to the ADTDL course list. 2 RC3 course errata sheets: The errata sheets are mailed to ATSC for printing and distribution.

TSP Completion (continued)

For a ---	By the ---	When ---
	(b) ATSC	ATSC: 1 Uploads course in the ADTDL (until installation DTAC standups) or enters approved course name in the ADTDL course list (following installation DTAC standup). 2 Distributes all validated TATS Course DL Department of the Army Audiovisual Information Production and Distribution Program (DAVIPDP) products not available via the ADTDL. 3 Provides annually through a BOIP to the TASS Training Battalions centralized reproduction and distribution of TASS courseware as required.
(3) TADSS TSP	(a) Training Proponent	The product is validated and master is ready for reproduction.
	(b) Approving Authority	It is fully ready for distribution and implementation.

Quality Control

k. For a quality TSP, each involved individual must ensure ---
(1) TSP meets format and component requirements in Appendix E.
(2) All TSP components meet requirements identified in respective chapters of this regulation.
(3) Training provided by the TSP is ---
(a) Feasible and cost-effective.
(b) Effective and valid.
(c) Sequential and progressive.
(4) The TSP (including components) is validated and approved prior to reproduction and distribution.

VI-8-7. Total Army School System (TASS) Battalion Training

TASS Training Battalion Description

The TASS Training Battalions help personnel meet military education and proficiency standards. They ---
(1) Function as an extension of the TRADOC proponent school.
(2) Provides exportable institutional training material.
Note: TR 351-18, Total Army School System (TASS), is the regulatory guidance for the TASS.

VI-8-8. Reserve Component Course Configuration (RC3) Program Description and Requirements

Purpose a. This program provided RC3 TSPs to support the TASS Training Battalions. It is being eliminated. Proponents are responsible for maintaining currency of RC3 courseware until replacement by TATS Courses. This maintenance will be accomplished by errata sheets.

RC3 Program Require-ments b. Program requirements are as follows:
(1) Establish baseline currency of RC3 TSPs.
(2) Use errata sheets to make minor revisions to RC3 courseware, e.g., to ensure safety and environmental protection.
(3) Program obsolete RC3 courseware for redesign as TATS Courses.

Note: A course is considered obsolete and in need of major revisions when over 30% of course lessons require revision. Also, these lesson revisions would result due to task performance changes that threaten survivability/mission accomplishment or that result in a major environmental or safety impact.

RC3 TSPs c. RC3 TSPs were designed, developed, printed, distributed, and managed under the RC3 Program. **Proponent involvement with RC3 TSPs is for sustainment/update purposes only. All new development of training packages exported to TASS Training Battalions will be TATS Course TSPs or RC3 TSP errata sheets.**

Product Completio d. RC3 TSP **errata sheets** are considered complete ---

By the ---	When ---
(1) Proponent school	The errata sheet Camera Ready Copy is accepted by Commander ATSC for reproduction.
(2) ATSC	The errata sheets are fully ready for distribution and implementation.

VI-8-9. Course Management Plan (CMP)

Description a. The course management plan is a document that provides the course managers
and the instructors the information required to manage and conduct the course. It is required for exported training courses, phases, or modules.

Outputs b. The primary CMP development output is the complete Course Management Plan and components.

Standard Format c. Follow the Course Management Plan format provided in Appendix E.

Start Point d. Course Management Plan development starts upon approval of the course design.

CMP Components e. The CMP will contain information necessary for managing and conducting the course. Format and component guidance is in Appendix E, Lesson Plan, TSPs, and CMP Formats and Components.

CMP Completion f. The Course Management Plan is considered complete when the TATS TSP is considered complete. See “TSP Completion” in Paragraph VI-8-6.

Quality Control g. For a CMP, each involved individual must ensure it ---
(1) CMPs and all components thereof are available at the using school/organization.
(2) CMP is complete, accurate, and current.
(3) Using school/organization implements course/course components IAW CMP.
(4) Common core input is included.

TR 350-10, paras 2-13c & para 5-11.

2-13c
c. An SGL-to-student ratio of 1:12-16 is required in SGI, with the exception of PLDC, which will be 1:6-8. An exception may occur during MOS technical phase(s) when TRADOC Manpower Activity validates a larger or smaller group size because of equipment or facilities restrictions. However, a class will not be conducted above or below these ratios without prior approval of the commandant/CG or his designated representative in the rank of colonel or higher. As an exception, the Commandant, USASMA is approval authority for NCOES common core Phase I regardless if it is taught separately or congruently with MOS technical phase(s).

5-11. NCOA staffing and organization.

a. The NCOA commandant is a CSM who works under the supervision of a MACOM, installation, or division commander and that commander’s CSM.

b. Staffing of NCOA is governed by the Manpower Staffing Standards System (MS3). Noncommissioned Officer Academy manpower is identified by management decision package "TSGT."

c. Commandants will attach and/or assign to the NCOA sufficient numbers of full-time SGLs, by MOS mix, and SSGLs, by CMF mix, required to train their programmed NCOES annual, by course, student loads.

(1) The SGL assigned to conduct each course/class will mentor and evaluate their students from day one through course graduation and complete separate DA Form 1059s on each student enrolled at the end of both common core and MOS technical

training. It is the TRADOC Commander's intent that except where prohibited due to safety concerns/constraints, the assigned or attached SGL should teach, coach, mentor, counsel and evaluate their students to the maximum extent possible during the conduct of all NCOES courses.

(2) The SGL MOS will be immaterial for the conduct of Phase I stand-alone ANCOC/BNCOC Common Core. However, for quality mentoring purposes, it is desired that a like CMF/MOS SGL be used to train soldiers who receive Phase I and II of their ANCOC or BNCOC congruently at their MOS proponent NCOA/school.

(3) Proponent NCOES students will not be administratively handed off, released, or turned over to the school's technical training departments at the end of Phase I ANCOC or BNCOC. While the proponent school's technical training departments may be responsible for delivering the MOS-specific curriculum, the NCOA commandant will remain responsible for each student's status. An assigned or attached academy SGL will remain in control of all NCOES attendees until they graduate or are otherwise disenrolled.

(4) Soldiers arriving at proponent schools for Phase II only (having already completed Phase I at another location), will be assigned to an academy like MOS SGL and join a like-MOS group for completion of their technical training.

(5) At ANCOC/BNCOC, no honors certificates or diplomas (other than the DA Form 1059) will be issued until the entire level of training or course (Phase II technical MOS phase/phases of the course) is completed.

Tab 7

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Standard 7 Reference Excerpts

TR 350-70

VI-1-3. Job Analysis Description and Requirements

Start Point c. A job analysis will be initiated only as a result of a needs analysis. Start points for new and revised job analysis are as follows:

New : A new job analysis begins when needs analysis identifies a training development requirement to create a new job, restructure a job, merge or consolidate jobs, or divide a job into two or more jobs.

Revision: A job analysis revision begins when needs analysis resulting from unit feedback, new doctrine, new/improved systems/equipment, lessons learned data from the Center for Army Lessons Learned (CALL), etc., identifies a change in the tasks performed in a job.

Procedures d. The activities that occur during each step are as follows:

Steps	Activities
(1) Identify job to analyze.	Receive an approved TD requirement for a job analysis.
(2) Develop the target audience description.	Determine – (a) Skill and knowledge level. (b) Reading grade level. (c) Previous training received. (d) Math skill level. (e) Armed Services Vocational Aptitude Battery (ASVAB) scores required for the job. ***Note:*** See the AR 611-series for target audience information.
(3) Compile total task inventory (titles only).	(a) Conduct job familiarization. (b) Identify tasks from SME interviews. (c) Extract tasks from --- 1 References. ***Note:*** Verify currency of references. List of Electronic DA-level Publications: www.usapa.army.mil/gils/pdfpubs.html 2 Mission analysis data. 3 Collective task analysis data. (d) Assign a temporary task number to each task title. ***Note***: Update this list as new tasks are identified, e.g., tasks needed to support new equipment/doctrine changes.

(4) Collect task performance data.	(a) Establish criteria for critical task selection. (b) Select critical task selection model. ***Note:*** This is a model used to apply statistically valid task selection data to identify critical individual tasks. There are a variety of models available for use. Those commonly used are --- 1 Difficulty-Importance-Frequency Model 2 Probability Of Task Criticality Model 3 Training Emphasis (TE) Model (c) Determine task performance data collection method: 1 Occupational Data, Analysis, Requirements, and Structure (ODARS) Program. ***Note:*** See Paragraph VI-1-5, ODARS Program. 2 Field survey. 3 Local survey. (d) Construct/Coordinate/Conduct the survey. ***Note:*** Collect information from soldiers performing or who have recently performed the tasks. (e) Compile the task survey data. (f) Conduct statistical analysis (analyze task performance data).
(5) Nominate critical individual tasks.	(a) Conduct a Task Selection Board. (b) Apply selection criteria and critical task selection model. ***Note 1:*** For minor changes to the critical task list, e.g., adding or deleting a critical task, it is not necessary to reconvene a Task Selection Board. ***Note 2:*** Coordinate (with ARNG and USARC) requirements for RC subject matter expert (SME) support for Task Selection Boards.
(6) Identify critical individual shared tasks.	Coordinate with task proponent for task analysis data and the Training Support Package (TSP).
(7) Obtain critical individual task list approval.	Provide complete recommended task list to the Training/TD (Task) Proponent commander/commandant for approval. ***Note*** For updates, provide new or deleted task recommendations to the approving authority with justification for change.

(8) Distribute the approved critical task list.	(a) Provide a copy of the approved critical task list to the office(s) that will conduct the individual task analysis. (b) Provide copy to proponency office for update of AR 611-series.
(9) Update task list based on individual task analysis findings.	When the follow-on task analysis determines that (a) a task is really two tasks, (b) the approved critical task is not a task, or (c) a task was omitted, then --- 1 Obtain approval of revised task list from to the approving authority. 2 Distribute revision.

Note 1: The procedures listed above are for an initial job analysis effort. All of these steps may not be required for a revision effort.

Note 2: Use the HQ TRADOC TD automation system (currently Automated Systems Approach to Training [ASAT]) as the automation tools meet the job analysis functional requirements in this regulation.

Note 3: Time and resource constraints may impact activity accomplishment.

Note 4: Most of the work associated with job analysis should be maintenance of the currently approved critical task list.

Critical Task Selection Board

e. The Task Selection Board is responsible for recommending individual tasks for approval as critical tasks.

Regular Members	Responsibilities
(1) **Chairman** (Tie-breaker, i.e., casts tie breaking vote only)	(a) Convenes the individual Task Selection Board. 1 Ensures adequate Active Component (AC) and Reserve Component (RC) representation. 2 Selects board members (approximately 5-7 SMEs). (b) Leads the discussions on critical task selection. (c) Advises board on procedural matters. (d) Is a subject matter expert.

Continued on next page

VI-1-3. Job Analysis Description and Requirements, Continued

Critical Task (continued)

	Regular Members	Responsibilities
Selection Board	(2) **Training Developers** (Non-voting members)	Advise board on educational, analysis, and procedural matters, to include explaining the --- (a) Training development process, especially the job analysis. (b) Task and critical task definitions. © Task performance data. (d) Task selection model.
	(3) **Subject Matter Experts** (Voting members)	(a) Recommend changes, i.e., rewording, combining, additions, or deletions of tasks to the total task inventory. (b) Provide technical information and advice to the board. © Determine criticality of each task based on the task selection model. (d) Recommend (rate) each task as critical or non-critical. ***Note:*** To serve on this board, SMEs should be one skill level higher than the job for which the tasks are being recommended.
	(4) **Evaluator** (Non-voting member)	(a) Ensures recommendation of tasks as critical/non-critical based on an appropriate task selection model. (b) Ensures task title meets the requirements in this chapter.
	(5) **RC Represen-tative(s)** (Voting member)	(a) Ensures RC requirements are included in the decision. (b) Functions as a subject matter expert.

Process Completion f. The job analysis process is completed when the individual critical tasks are identified and approved by the Training/TD (Task) Proponent commandant/agency commander or the designated representative.

TR 350-70
VI-2-2. Administrative Information

Purpose a. The critical individual task analysis is the process used to identify how the task is actually performed, under what conditions it is performed on the job, and how well the individual must perform it. It provides the detail to design and develop efficient and effective individual training.

References b. Required **regulatory** reference is CJCSM 3500.04, Universal Joint Task List

Note: TRADOC **procedural** analysis guidance TBD.

Definitions c. See the Glossary for TD-related terms. An understanding of the following terms is necessary for this chapter.

- Condition
- Standard
- Skill
- Knowledge
- Performance steps
- Performance Measure
- Army Universal Task List (AUTL)
- Task performance specifications

Responsibilities d. See Appendix B, Responsibilities, for top-level TD-related responsibilities. Specific Training/TD (Task) Proponent responsibilities related to individual task analysis follows:

(1) Conduct an analysis of each proponent critical individual task.

(2) Coordinate with ***National Guard Bureau (NGB),*** Training Division, and ***Headquarters, U.S. Army Reserve Command (USARC*****)**, Individual Training***, through your Deputy Assistant Commandant (ARNG or USAR) or Total Force Integration Officer*** requirements for RC subject matter expert (SME) support for task analysis. Include TASS Training Battalion coordination for SME support. If on-site SMEs are not available, attempt "distance training development (TD)" when automation capabilities permit.

(3) Identify critical task performance specifications.

(4) Establish critical task performance standards.

(5) Maintain a current individual critical task analysis of all proponent critical tasks, including common soldier tasks, common skill level tasks, shared and branch-specific tasks.

(6)Use task performance specifications to develop all follow-on individual training products.

TR 350-70

VI-2-3. Task Analysis Description and Requirements

Description a. The critical individual task analysis is the process used to provide the task performance detail needed to develop efficient and effective individual training. The training developer conducts an individual task analysis for each critical individual task to identify all task performance specifications for that specific task. These specifications are concerned with how the task is actually performed, under what conditions it is performed, or how well the soldier must perform it. Task analysis data for critical tasks serve as the foundation for development of all subsequent individual training products.

Output b. Critical Individual task analysis is a ***minimum essential requirement*** before development of individual training products. Required individual task analysis outputs:

(1) Individual task performance specifications, including task performance standard.

(2) Task analysis report.

(3) Soldier Training Publications (STP) task summary data.
(4) Individual-to-collective task matrix.
(5) Individual-to-skill/knowledge matrix.

Start point c. Start points for new and revised individual task analysis are as follows:
(1) **Revision**:A individual task analysis revision begins when needs analysis identifies a training development requirement to revise/update an existing critical individual task analysis because of a change in how a current critical individual task is performed.
(2) **New**: A new critical individual task analysis starts ---
(a) On receipt of a new critical individual task.
(b) When there is a significant change in how a task is performed.

Procedures d. The activities that occur during each step are as follows:

Steps	Activities
(1) Identify individual task performance specifications	(a) Review the task title. (b) Develop the task condition statement. ***Note:*** Identify special conditions such as wearing of MOPP4, night-vision devices (NVD), and self-contained underwater breathing apparatus (SCUBA), as appropriate. (See sample.) (c) Identify and list all individual task performance steps in performance sequence order. ***Note 1:*** The first step is usually the triggering circumstance initiating task performance. ***Note 2:*** One of the first performance steps may be to conduct a risk assessment. (d) For each task performance step, identify the --- 1 Skills and knowledge required to perform the step. 2 References required by title, publication number, date, and paragraph number. 3 Equipment/End items/Materials required. 4 All safety factors, hazards, and considerations associated with the performance step. (Includes Hazardous Communication considerations). 5 All environmental factors and considerations associated with the performance step. 6 Supporting individual tasks, including leader tasks, performed as part of or in support of the individual task being analyzed. 7 Cue, condition, and standard for each performance step as needed to support simulation design.

VI-2-3. Task Analysis Description and Requirements, Continued

Procedures (continued)

Steps	Activities
(1) Identify individual task performance specifications (continued)	(e) Develop an objective task standard that measures task performance. (f) Establish performance measures. (g) Identify Army Universal Task List (AUTL) tasks that are supported by the critical individual task. (h) Identify supported individual tasks. (i) Determine if specific certification is required for task performance.
(2) Assign a permanent individual task number	Follow critical individual task numbering guidance. See para entitled “Individual Task Number System” (this chapter).
(3) Prepare the individual to-collective task matrix	(a) Identify supported collective tasks. (b) Link this individual task to all supported collective tasks.
(4) Develop a task-to-skill/knowledge matrix	Develop on an “as needed” basis. It is valuable for comparing task content and for structuring and sequencing training.
(5) Obtain individual task analysis approval	Obtain approval from appropriate command authority for new and revised task analysis.
(6) Distribute approved individual task analysis	Distribute the approved task analysis data to the appropriate organizations for use in designing and developing training and training products.
(7) Update individual task analysis	Keep task performance specifications current.

Note 1: Coordinate (with ARNG and USARC) requirements for RC subject matter expert (SME) support for task analysis. Include TASS Training Battalion coordination for SME support. If on-site SMEs are not available, attempt "distance TD" when automation capabilities permit.

Note 2: Use the HQ TRADOC TD automation system (currently Automated Systems Approach to Training [ASAT]) as the automation tools meet the task analysis functional requirements in this regulation.

Note 3: The critical task analysis procedures listed above are for an initial effort. All steps would not necessarily be required for a revision effort.

Process Completion

e. The individual task analysis is complete when all individual task performance specifications and supporting and supported critical individual tasks have been identified.

VI-2-3. Task Analysis Description and Requirements, Continued

Quality Control

i. To ensure quality results from the individual task analysis, personnel involved must ensure ---

(1) The critical individual task analysis is complete and comprehensive.
(2) The individual task analysis content is technically accurate.
(3) Task title includes an observable, measurable verb from the standard verb list.
(4) Condition statement is clear, complete, and accurate.
(5) Standard is objective and measures task performance.
(6) Task performance steps are sequential.
(7) Task performance hazards and environmental/safety factors for each step are identified and listed.
(8) Skills and knowledge for each performance step are identified.
(9) Performance measures are observable and measurable and the evaluator can use them to determine if the task has been accomplished.
(10) The individual-to-collective task matrix is complete and accurate.
(11) The critical task analysis data is handed off to the appropriate organizations.
(12) The task analysis is kept current.
(13) The identified task analysis deficiencies are corrected.

TR 350-10, para 1-4.

Para 1-4g(1)(b).
g. Commandant, U.S. Army Command and General Staff College (CGSC). The Commandant, CGSC—

(1) Serves as executive agent for Officer Education System (OES) common core, excluding the precommissioning tasks, to ensure officer training and education is vertically aligned (progressive and sequential) and meets the needs of current and future officers. Monitors compliance with common core training guidance and coordinates requirements and standards with precommissioning sources and branch schools.

(a) Budgets for perpetual maintenance of common core responsibilities.

(b) Triennially, conducts task selection board to update and revalidate the OES common core. Membership will include representatives from appropriate major Army commands (MACOMs); National Guard Bureau (NGB); U.S. Army Reserve Command (USARC); branch schools; other common core executive agents; all precommission sources; and interested agencies and activities. Recommends tasks to be added, deleted, or modified to Commander, TRADOC, ATTN: ATTG-IL.

Para 1-4i.

i. Commander, U.S. Army Maneuver Support Center (MANSCEN). The Commander, MANSCEN—

(1) Analyzes, designs, develops, conducts, and evaluates maneuver support officer, warrant officer, and NCO training per AR 350-1, TRADOC Reg 350-70, and this regulation.

(2) Develops and publishes maneuver support branch OES, WOES, and CMF/MOS-specific NCOES training products, STPs, and ITPs per TRADOC Reg 350-70, as required.

(3) Produces training strategies to optimize training productivity and effectiveness.

(4) Develops training that incorporates modernization efforts.

(5) Vertically and horizontally aligns maneuver support branch tasks in officer, warrant officer, and NCO courses.

(6) Assesses the training evaluation process at associated schools, ensures branch-specific training is not redundant with common core, and ensures common core training is not redundant at each level of training.

Para 1-4j.

j. Commanding General, U.S. Army Cadet Command. CG, Cadet Command—

(1) Coordinates, integrates with other precommission sources, and assesses precommission common core training effectiveness and efficiency, and recommends improvements and changes that support common tasks required as part of precommission training.

(2) Along with other precommission sources, participates in precommission common core task review, selection, and training development process.

(3) Assesses the degree of training standardization by ROTC, U.S. Military Academy (USMA), Federal OCS, State OCS and WOCS.

(4) Coordinates and implements the Precommission Training Visitation Program with USMA, Federal OCS, and Army National Guard of the United States (ARNGUS) OCS.

(5) Participates in an annual Four-Gold Conference with other precommission sources to review, assess, and make recommendations for the planning, standardization, and implementation of precommission training.

(6) Coordinates with HQ TRADOC for quotas and support for airborne, air assault, ranger, and master fitness training courses and the Cadet Foreign Exchange Program.

(7) Participates in precommission Doctrinal Review and Advisory Group meetings, as required.

(8) Reviews, coordinates, analyzes, and provides impact statements regarding the Training Literature Program issues affecting precommission training.

(9) Participates in the annual Tri-Service Reserve Officer Training Corps (ROTC) Conference.

Tab 8

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Standard 8 Reference Excerpts

TR 350-70
VI-6-7. Structuring and Sequencing

Description a. The training structure organizes the training and lays out the training sections (phases, modules, lessons, etc) graphically portrayed.

(1) Training structure is portrayed in a training outline which ---
(a) Is a working document, allowing flexibility to modify training materials or products.
(b) Shows how all learning objectives will be trained and evaluated.
(c) Provides mandatory training sequence, i.e., a logical order for presenting the lessons, learning objectives, and learning steps/activities.
(2) When complete, the training structure and sequence are detailed in a course map, a graphic portrayal of a course's presentation.

Note: Other product training outlines (e.g., audiovisual (AV) product storyboard; tank table) have the same basic requirements but differ in format from resident training course outlines.

Outputs b. The major outputs of this design function are ---
(1) Training structure/outline (phases, modules, lessons, tests, etc).
(2) Mandatory training sequence.
(3) Course map.

Note: A supporting product that may be produced is a matrix showing dependent relationships among tasks, skills and knowledge, and learning objectives.

TR 350-6, Chs 2 & 3.
Chapter 2
Soldierization Program

2-1. General. Initial Entry Training develops volunteers into soldiers and delivers these quality soldiers to the operational force through a comprehensive, 5-phased soldierization program.

2-2. Phased training.

a. Phases and associated goals provide intermediate objectives that give common direction and serve as milestones during IET. The training cadre informs IET soldiers of the goals and standards for each phase of training. Movement from each phase is viewed as a "gate" for each soldier. The training cadre evaluates each soldier's performance by the standards for each phase before advancing to the next phase. The five training phases and associated goals and privileges are shown at table 2-1.

b. The first three phases of IET are associated with BCT, and the BCT portion of OSUT. The last two phases are associated with AIT and the MOS training portion of OSUT. In OSUT courses, Phases III and IV may be combined. This will generally depend on how early in the course MOS training begins, and whether basic skills testing is conducted at

mid-cycle or end-of-cycle. The senior IET commander can adjust the established phase length to ensure soldiers are trained to the course standards.

(1) Phase I is designated as the "Red" phase. This phase encompasses weeks 1-3 of IET and is characterized by an environment of total control where active, involved, positive leaders begin transforming volunteers into soldiers. Training during this phase is focused on immersion in the Army's core values, traditions, and ethics; the development of individual basic combat skills; the development of teamwork; and physical fitness training. The goals for soldiers in Phase I include, but are not limited to:

(a) Pass Phase I test.

(b) Pay strict attention to detail.

(c) Conform to established standards.

(d) Begin to work effectively as a team member.

(e) Master basic skills.

(f) Maintain individual and platoon areas.

(g) Develop physical fitness consistent with time in training.

(h) Receive an introduction to the Army's values, history, heritage, and traditions.

(i) Demonstrate the capability to operate effectively in a stressful environment.

(2) Phase II is designated as the "White" phase. This phase encompasses weeks 4-6 of IET. This phase is centered on the development of basic combat skills, with special emphasis on weapon proficiency and physical fitness training. Skill development, self-discipline, and team building characterize phase II, along with a lessening of control commensurate with demonstrated performance and responsibility. Soldiers receive additional instruction on Army values, ethics, history, and traditions. The goals for IET soldiers in Phase II include, but are not limited to:

(a) Pass the Phase II test.

(b) Conform to established standards.

(c) Display self-discipline.

(d) Qualify with the M16A2 rifle or assigned weapon.

(e) Develop physical fitness consistent with time in training.

(f) Continue to develop capability to work as a team member under stressful conditions.

(g) Receive reinforcement training on Army history, heritage, and traditions; articulate the Army's values.

Table 2-1
IET phases, training goals, and privileges*

PHASE	I	II	III	IV	V	V+
	Basic Combat Training (BCT)			Advanced Individual Training (AIT)		
	One Station Unit Training (OSUT)					
WEEKS	1 THRU 3	4 THRU 6	7 THRU 9	10 THRU 13	14 THRU 20	21 THRU COMPLETION
COLOR DESIGNATION	RED	WHITE	BLUE	BLACK	GOLD	GOLD
GOALS						
PASS PHASE TESTS	X	X	X	X	X	
CONFORM TO STANDARDS	X	X	X	X	X	X

Standard 8 Reference Excerpts

OPERATE AS A TEAM MEMBER	X	X	X	X	X	X
ATTENTION TO DETAIL	X	X	X	X	X	X
MASTER BASIC SKILLS	X	X	X	X	X	X
MAINTAIN INDIVIDUAL/PLATOON AREAS	X	X	X	X	X	X
DEVELOP PHYSICAL FITNESS	X	X	X	X	X	X
DEMONSTRATE SELF DISCIPLINE		X	X	X	X	X
DEMONSTRATE THE CAPABILITY TO COPE WITH STRESS	X	X	X	X	X	X
IMMERSE IN ARMY VALUES	X	X	X			
REINFORCE VALUES	X	X	X	X	X	X
DEMONSTRATE VALUES			X	X	X	X
QUALIFY WITH RIFLE		X				
COMPLETE APFT (150 PTS/50 PER EVENT)			X			
COMPLETE POI REQUIREMENTS			X	X	X	X
LEVEL OF SUPERVISION	TOTAL CONTROL	REDUCED CONTROL	REDUCED CONTROL	REDUCED CONTROL	REDUCED CONTROL	SIMILAR TO PERMANENT PARTY
PASS APFT (180 PTS/60 PER EVENT)					X	X
OPERATIONAL UNIT ENVIRONMENT					X	X
PRIVILEGES *						
TOTAL CONTROL	X					
RESTRICTED TO COMPANY AREA	X					
ESCORTED TO PX BY DRILL SGT	X					
BRIGADE AREA PASSES		X	X	X	X	X
ON-POST PASS			X	X	X	X
OFF-POST PASS			FAMILY DAY: CAN RECEIVE OVERNIGHT PASS WHEN ACCOMPANYING FAMILY	X	X	X
OVERNIGHT PASS			AFTER GRAD		X	X
WEAR CIVILIAN CLOTHES					X	X
DRIVE OR RIDE IN POV			Para 2-3c(3)(c)	Para 2-3c(3)(d)	Para 2-3c(3)(e)	X
ALCOHOL USE FOR SOLDIERS OF LEGAL AGE (NOT IN THE PRESENCE OF IET SOLDIERS IN PHASES I-V)						X
TOBACCO USE (NOT IN THE PRESENCE OF IET SOLDIERS IN PHASES I-V)						X
***Privileges are earned and can be reduced or modified based on soldier performance and discipline.**						

(3) Phase III is designated as the "Blue" phase. This is the last phase of BCT and encompasses weeks 7-9 of IET. This phase concentrates on individual tactical training, increased soldier leadership, increased self-discipline, and the IET soldier's understanding of the importance of teamwork. This phase culminates with the application of all skills learned in BCT during a 72-hour FTX. This exercise is designed to stress IET soldiers physically and mentally, and requires each soldier to demonstrate their proficiency of basic combat skills in a stressful tactical field environment while operating as part of a team. In BCT, successful demonstration of all phase III skills will be commemorated by a "rite of passage" ceremony, marking the transformation from volunteer to soldier. In OSUT, transition from phase III to phase IV will be marked with an appropriate ceremony. The goals for soldiers in Phase III include, but are not limited to:

(a) Conform to Army standards.

(b) Complete the APFT to BCT standard (50 points each event, 150 points total).

(c) Complete all BCT POI requirements.

(d) Demonstrate the ability to think, look, and act like a soldier without detailed supervision.

(e) Demonstrate knowledge of the Army's values, history, heritage, and traditions.

(f) Demonstrate the capability to operate effectively as a team member under stressful conditions.

(4) Phases IV and V of the soldierization program occur in AIT and OSUT and are characterized by lessening of control and increased emphasis on personal responsibility and accountability. Initial entry soldiers also receive reinforcement training on Army Values and teamwork and an introduction to the history, heritage, and traditions of their specialty branch. This lessening of control, expansion of privileges, and focus on MOS skills are all part of the evolutionary process marking the transformation from volunteer to soldier.

(a) Phase IV begins at the start of the 10th week and continues to the end of the 13th week. It is characterized by reduced supervision by drill sergeants, reinforcement training on common skills, values, and traditions taught in BCT, and increased emphasis on MOS tasks. Upon arrival at the AIT unit, IET soldiers starting AIT will receive initial counseling. This session will be used to establish goals consistent with the soldier's MOS training requirements as prescribed in the appropriate POI and this regulation.

(b) Phase V begins at the start of the 14th week and continues until completion of IET or the 20th week of training. It is characterized by reinforcement training on common skills, training and evaluation of MOS skills, a leadership environment that simulates the environment in an operational unit, and a culminating tactical FTX that integrates common and MOS tasks. This exercise is designed to reinforce the basic combat skills learned in BCT, and their application to the soldier in the execution of MOS-related duties in a tactical field environment.

(c) Phase V+ begins at week 21 and continues through completion. Phase V+ soldiers will be billeted separately from other IET soldiers and, at the commanders' discretion, privileges will approximate those held by permanent party soldiers. On installations where separation from other IET soldiers is not possible, use of tobacco

and alcohol will be restricted. Graduates of IET who attend follow-on training prior to arriving at their gaining unit will comply with the same requirements. Graduates of DLIFLC will retain their Phase V+ privileges (see app C) during their AIT.

(d) Initial Entry Training commanders may implement Fast Track programs as described in appendix D. Fast Track programs recognize the superior capabilities of selected IET soldiers, and provide them opportunities for additional MOS training and early promotion.

(5) Graduation from OSUT/AIT signifies successful completion of the first five phases of the soldierization program. Units conducting AIT will conduct an appropriate branch pinning ceremony in conjunction with the awarding of the MOS.

c. The following formal counseling requirements will be met for all IET soldiers:

(1) Company commanders will ensure subordinate leaders counsel soldiers within 72 hours of arrival at the training unit.

(2) Soldiers are counseled at the conclusion of each phase of training.

(3) Counseling includes an objective evaluation of the soldier's progress, adherence to Army Values, capability to operate as a team member, and establishment of attainable goals for the next phase of training.

(4) Soldiers are counseled on the provisions for additional training should they not be able to meet established standards and requirements (e.g., new start, rehabilitative transfer, remedial training).

(5) All performance counseling will be documented on DA Form 4856 (Developmental Counseling Form) or on a locally produced form.

d. Installations will use phase banners to distinguish a platoon's phase of training and recognize the passage of a platoon from one phase to another. Guidons are not authorized at the IET platoon level IAW Army Regulation (AR) 840-10.

(1) Local programs will be established that govern the awarding, carrying, and displaying of platoon banners.

(2) Banners will be attached to a standard 7-foot flagstaff (marker and marker pennant's flagstaff). The flagstaff head (finial) will be an acorn to distinguish it from the company guidon.

(3) Banners will be made of nylon bunting.

(4) Banners will be solid colors.

(5) Color designations for the five IET phases are:

(a) Red for Phase I.

(b) White for Phase II.

(c) Blue for Phase III.

(d) Black for Phase IV.

(e) Gold for Phase V.

(6) Banners will be swallow-tailed in shape. The finished dimensions will be 18 inches high by 30 inches wide with the "V" 5 inches deep. The hem on the 18-inch straight side will provide a pocket designed to fit a flagstaff. The other hems will be 1-inch deep.

(7) At AIT installations where IET platoons include Phase IV and Phase V soldiers in the same platoon, the senior IET commander is authorized to exempt those platoons from using phase banners.

(8) Platoon achievement streamers may be used with the banners to recognize achievement in various platoon level training events/activities.

2-3. Amount and type of control/phase privileges.

a. During IET, the cadre leadership should evolve from total control over soldiers to the point where it duplicates the leadership environment in operational units. This gradual change supports the soldierization program, yet lets the drill sergeant gauge how self-disciplined the soldiers are and maintain or relinquish control accordingly.

b. A period of total control (e.g., continuous cadre supervision, soldiers restricted to company area, limited free time) will be enforced during phase I of IET.

c. Privileges/limitations for IET soldiers.

(1) Privileges granted in IET will support the phase training program, which establishes intermediate goals to facilitate the transformation from volunteer to soldier. Specific privileges will be associated with each phase of training as incentives, and soldiers will be eligible for these privileges as they progress in training. However, the decision to award privileges will be based on an individual's performance and the privileges authorized for that specific phase of training. Commanders may authorize full or limited phase privileges based on the individual soldier's performance. Soldiers will be given additional freedom as they demonstrate more self-discipline and the ability to accept responsibility. These are privileges, not rights, and as such, can be withheld, modified, or withdrawn based upon performance, mission, and program requirements.

(2) Wearing of civilian clothes is strictly limited during IET. Local Standard Operating Procedures (SOPs) will govern attire for IET soldiers departing on emergency leave prior to deferred issue. When time and facilities permit, the soldier will be issued a Class A uniform before departing on emergency leave.

(3) The following privileges are the maximum allowed and, as such, commanders can be more restrictive. Commanders may not add to the authorized list of privileges within phases. Less restrictive standards will be requested as exceptions to policy from HQ TRADOC, ATTN: ATTG-IT.

(a) Phase I, weeks 1 through 3. No passes are permitted and IET soldiers are restricted to the company area. The IET soldiers will only be allowed outside the company area when in formation or escorted by a cadre member. A drill sergeant will escort IET soldiers in this phase to the Post Exchange (PX). Soldiers are prohibited from driving or riding in privately owned vehicles (POVs), and from wearing civilian clothes. They are also prohibited from consuming alcoholic beverages and using tobacco products.

(b) Phase II, weeks 4 through 6. Passes in brigade area may be authorized (outside brigade area, in formation and escorted only). This modification is used as a reward for excellent achievement as determined by the battalion commander for use of theaters, swimming pools, etc., which may not be available within the brigade area. In this phase, IET soldiers are prohibited from driving or riding in POVs, and from wearing civilian clothes. They are also prohibited from consuming alcoholic beverages and using tobacco products.

(c) Phase III, weeks 7 through 9. On-post passes may be authorized. Off-post overnight passes may be authorized in support of family day activities the day prior to graduation provided the soldier is signed out by a responsible family member. Upon the brigade/battalion commander's discretion, IET soldiers may ride with family members in POVs on family day, graduation day, and/or ship day from BCT if those same family members are carrying their respective soldier to AIT. The IET soldiers in this phase are prohibited from wearing civilian clothes, and using alcohol and tobacco products.

(d) Phase IV, weeks 10 through 13. Off-post day passes on weekends (Saturday and Sunday) may be authorized. Initial entry soldiers must remain within a 50-mile radius of the post, and all passes must end not later than (NLT) 2200. Initial entry soldiers will wear the proper military uniform while on pass (includes off-post passes) and are prohibited from driving POVs. They may ride in POV of parent, legal guardian, or spouse while on pass; no other riding in POV is authorized. Initial entry soldiers are prohibited from using alcohol and tobacco products.

(e) Phase V, weeks 14 through 20. Off-post and overnight passes on weekends may be authorized. Local commanders will impose distance limitations; however, all passes must end NLT 8 hours prior to the next training day. Uniform for off-post passes is at the commander's discretion. Initial entry soldiers are prohibited from using alcohol and/or tobacco products, and from driving POVs. Initial entry soldiers may ride in POV of parent, legal guardian, or spouse while on pass; no other riding in POV is authorized.

(f) Phase V+, week 21 through completion. The following policy applies:

- Phase V+ soldiers (at week 21) will be billeted separately from other IET soldiers.
- At the commander's discretion, privileges will approximate those held by permanent party soldiers.
- On installations where separation from other IET soldiers is not possible, use of tobacco and alcohol will be restricted.
- Graduates of DLIFLC arriving at AIT will retain their Phase V+ privileges (see app C).

(g) Soldiers who are reclassified after failing to obtain an MOS may retain their previously earned phase privileges after being evaluated by the gaining AIT unit. This evaluation should be completed within two weeks of the soldier signing into the unit. Until the evaluation is complete, the soldier will start with Phase IV privileges.

(4) Normally, IET soldiers are not granted leave between BCT and AIT unless they meet one of the following requirements:

(a) Soldiers are attending an AIT course of 24 weeks or longer. These courses have a one-week delay built into the Army Training Requirements and Resource System (ATRRS) between their BCT graduation date and their AIT report date. Soldiers may elect to take up to one week of leave, or report directly to AIT upon graduation from BCT. The losing BCT site will coordinate with the gaining AIT installation for early arrival.

(b) Soldiers graduating from BCT in December with an AIT start in January.

(c) Soldiers taking EXODUS leave during BCT are not authorized to take any additional leave between BCT graduation and the start of AIT (this includes AIT courses that are 24 weeks or longer).

(d) Battalion commanders may grant exceptions on a case-by-case basis.

2-4. Constructive credit.
a. The IET requirements are established to produce the high quality soldier demanded in today's Army. Only in extraordinary circumstances will constructive credit for these requirements be granted.

b. The installation commander may grant constructive credit to an entire class or an individual soldier for a missed training event. For example, a class may receive constructive credit for an event missed due to severe weather conditions for which time and/or resources preclude rescheduling and execution. An individual may receive constructive credit for a missed training event due to circumstances beyond his/her control such as illness, injury, emergency leave, etc.

c. Every effort must be made to reschedule and conduct the missed training before a decision to provide constructive credit is made. This credit will be selectively used, and only in those cases where there is a clear demonstration that the soldier meets or exceeds the IET graduation standards.

d. Constructive credit authority resides at the TRADOC ATC or installation commander level, and may be delegated no lower than the IET brigade commander level. For those training sites located at non-TRADOC installations, this authority will reside with the first general officer in that school's chain-of-command.

2-5. Initial Entry Training environment.
a. An effective soldierization program results from the IET soldier's total immersion in a positive environment established and sustained by active, involved leadership. This environment sets high standards, provides positive role models, and uses every training opportunity to reinforce essential soldier skills. Initial Entry Training begins with the soldier’s arrival at the training company on Reception and Integration Day, and continues through AIT or OSUT graduation. Officer and NCO leadership is the cornerstone of a positive IET environment and a successful soldierization program.

b. Investment strategy in IET.
(1) The U.S. Army's motivated and professional IET cadre can train almost anyone who has the mental and physical capacity to complete IET. Each cadre member accepts responsibility for providing a positive environment in which new soldiers have every opportunity to succeed.
(2) Cadre will train their soldiers by building on and affirming their strengths and shoring up their weaknesses. It is imperative that unit cadre establish high standards of performance and insist their soldiers meet these standards. Cadre members coach, mentor, and assist their soldiers in meeting the standards through performance counseling and phase goal setting. Discharging soldiers because they fail to meet certain standards, when additional coaching could bring them up to par, is not in keeping with the intent of the investment strategy. The investment strategy raises the individual to the standard; it does not lower the standard for the individual.

2-6. Treatment of IET soldiers.
a. Initial entry soldiers will be addressed as "Soldier," "Private" (or appropriate rank), or by last name.

b. Soldiers will not be addressed by gender (such as "you female(s)...").

c. Initial entry soldiers will be treated with the same fairness, respect, and regard for dignity accorded to all soldiers.

d. Soldiers must develop a capacity to cope with stress. Most stress should come from the requirement to meet standards on a wide range of diverse tasks in a short amount of time.

e. Hazing is prohibited.

(1) Hazing is defined as any conduct whereby a military member or members, regardless of rank, causes another military member, regardless of rank, to suffer or be exposed to any activity which is cruel, abusive, humiliating, oppressive, demeaning, or harmful. Soliciting or coercing another to perpetrate any such activity is also considered as hazing. Hazing need not involve physical contact among or between military members; it can be verbal or psychological in nature. Actual or implied consent to acts of hazing does not eliminate the culpability of the perpetrator. Hazing is an offense punishable under the UCMJ.

(2) This definition can include, but is not limited to, the following: playing abusive tricks; threatening or offering violence or bodily harm to another; striking; branding; tattooing; any consumption of alcohol, drug, or tobacco product; or causing the harmful, excessive, or abusive consumption of food or any other substance.

(3) Hazing does not include command-authorized mission or operational activities, the requisite training to prepare for such missions or operations, administrative corrective measures, extra military instruction, command-authorized physical training (PT), and other similar activities that are authorized by the chain-of-command. (Corrective training is a key component of the investment strategy.)

f. Degrading soldiers by use of vulgar, sexually explicit, obscene, profane, humiliating, racially, sexually or ethnically slanted language is prohibited.

g. Physical contact with soldiers for disciplinary or other reasons is prohibited, except where the safety of the IET soldier is in question (e.g., heat exhaustion, physical injury, etc.). Physical contact when making corrections directly related to training is permitted. Cadre are not required to ask the soldier's permission to make necessary corrections.

h. Physical exercises listed in FM 21-20 may be used as corrective action for minor infractions. Other exercises will not be used.

(1) Only drill sergeants, uniformed military instructors, and the soldier's immediate chain-of-command are authorized to employ physical exercise for corrective action.

(2) Initial entry soldiers occupying soldier leadership positions are prohibited from administering physical exercise as corrective training.

(3) The use of physical exercises in this manner is an attention getting device and unrelated to remedial PFT. The number of repetitions of any exercise must be commensurate with the soldier's physical conditioning progression. All corrective action will be administered within the limits of the soldier's profile.

(4) The soldier's performance must be supervised. The decision to use exercise as corrective action must include a consideration of climatic conditions.

i. Soldiers will be given a reasonable time to eat their meals. Depriving soldiers of meals or restricting meal choices is prohibited as a form of discipline. Drill sergeants and cadre are not authorized to select menu items for IET soldiers as a means of diet control.

j. Sexual harassment, fraternization, or unprofessional association are explicitly forbidden IAW AR 600-20 and may violate local installation regulations. Such offenses may be punishable under the UCMJ.

k. Initial entry soldiers will be given the opportunity to contribute to approved charities and welfare campaigns in the same way as other soldiers. However, commanders will obtain legal advice from their servicing Staff Judge Advocate (SJA)/Ethics Counselor prior to conducting any fundraising events.

l. Initial entry soldiers will not be required or encouraged to purchase common use items or cleaning supplies with their own funds (e.g., billets' cleaning supplies, weapons cleaning items, tools, irons or other common use items). Supplies or tools needed to perform routine cleaning and maintenance tasks will be obtained through unit supply channels. Initial entry soldiers will not be required to purchase any issue items unless they lost an item issued to them.

m. Soldiers are to be treated with dignity and respect by civilian employees. Civilian employees may be disciplined if they are discourteous to soldiers, or use abusive or offensive language/gestures in the presence of soldiers. Officers, NCOs, and civilian supervisors will be especially vigilant and correct or report improper actions and attitudes of employees toward soldiers.

2-7. Trainee abuse investigation and reporting.

a. Trainee abuse (see glossary, sec II) in any form is unacceptable. It destroys a positive training environment and ignores Army Values. Preventing, discovering, and tracking trainee abuse is a top priority for TRADOC. All IET commanders are charged with this mission.

b. Guidelines for reporting soldier maltreatment and trainee abuse incidents through command and Provost Marshal channels are set forth respectively in AR 190-40 and HQ TRADOC Policy Memorandum, ATCS-EOC, 28 Apr 97, subject: TRADOC Operations Reporting (TRADOC OPREP). Commanders are responsible for reporting trainee abuse allegations as defined in these guidelines. TRADOC Emergency

Operations Center will forward TRADOC Operations Reports (OPREPs) concerning trainee abuse to the TRADOC Assistant Chief of Staff for Operations and the TRADOC SJA. The TRADOC OPREPs will provide the initial data for the TRADOC trainee abuse report.

c. Commanders will promptly conduct a preliminary inquiry into every trainee abuse allegation, regardless of the nature, magnitude, or source of the complaint. For some allegations, a quick and informal interview of the complainant and any witnesses may be all that is required. Other allegations may require more extensive command or law enforcement investigation. Commanders are encouraged to consult with their legal advisor when conducting inquiries or evaluating evidence.

d. Commanders will document and maintain records of all preliminary inquiries into trainee abuse cases, including those determined by the commander not to be credible. Commanders/Installation SJAs will provide supplemental information on all trainee abuse OPREPS to TRADOC SJA in an accurate and timely manner. If, after conducting a preliminary inquiry, a commander determines that a trainee abuse allegation is not credible, the case will be removed from the TRADOC Trainee Abuse Report.

e. Suspension of a drill sergeant is required by AR 614-200 "when a serious incident occurs that requires an investigation." This includes investigations conducted IAW AR 15-6, or those conducted by the Criminal Investigative Division (CID) or a Military Police Investigator. Commanders should not automatically suspend drill sergeants or other cadre simply because they are pending a preliminary inquiry into a trainee abuse allegation. Commanders will make suspension decisions based upon the facts of each case and may suspend individuals pending a preliminary inquiry if it will aid the inquiry, benefit the training environment, or for other valid command reasons.

f. Terms of reference.

(1) Credible allegations. Trainee abuse allegations are "credible" when a commander determines that it is "more likely than not" that the abuse occurred. The commander may make this determination only after a preliminary inquiry, an administrative investigation, or a law enforcement investigation. Commanders should find allegations credible if, after considering all evidence available, the evidence points to a particular conclusion as being more credible and probable than any other conclusion. The number of witnesses or volume of physical evidence does not determine the weight given to the evidence. Commanders should consider all the evidence and evaluate such factors as the witness's demeanor, opportunity for knowledge, information possessed, ability to recall and relate events, and other indications of truthfulness.

(2) Non-credible allegations. Trainee abuse allegations are "non-credible" when a commander determines that it is "more likely than not" that the abuse did not occur. The commander may make this determination only after a preliminary inquiry, an administrative investigation, or a law enforcement investigation.

(3) Preliminary inquiry.

(a) Rule for Courts Martial 303 states that, "Upon receipt of information that a member of the command is accused or suspected of committing an offense or offenses triable by court-martial, the immediate commander shall make, or cause to be made, a preliminary inquiry into the charges or suspected offenses."

(b) The preliminary inquiry is usually informal. It may be an examination of the charges and an investigative report, or other summary of expected evidence. In other cases, a more extensive investigation may be necessary.

(c) The commander may conduct the investigation personally or with members of the command. In serious or complex cases, the commander should consider whether to seek the assistance of law enforcement personnel in conducting any inquiry or further investigation. The inquiry should gather all reasonably available evidence bearing on guilt or innocence, and any evidence relating to aggravation, extenuation, or mitigation.

2-8. Integration of male and female soldiers.

a. For all MOSs and/or courses open to female soldiers, IET is gender-integrated to the squad level. All soldiers, regardless of gender, train to a single standard - the Army standard. Performance requirement differences, such as Army physical fitness test scoring, are based on physiological differences and apply to the entire Army. Integrating training at the lowest levels, in an environment where control and supervision are maximized, enhances the ability of the training base to deliver a soldier fully prepared to take his/her place in the ranks of an integrated Army.

b. Formation of single-gender companies or platoons is not authorized. The same POI will be used for males and females. Male and female soldiers may be housed in the same building provided there is physical separation of sleeping and latrine facilities. The intent is to maintain, to the maximum extent feasible, company integrity within a barracks. Integration of males and females on the same floor without a physical barrier between the male and female sleeping and latrine areas is prohibited.

2-9. Separate and secure environment.

a. Physical security measures:

(1) Each gender has an independent sleeping area.

(2) Each gender has its own latrine.

(3) Each gender has its own entrance to the living area.

(4) Entrances to sleeping areas are monitored by fireguards during sleeping hours.

(5) Door alarms installed. Doors will be locked if so equipped.

(6) Fire-safe barrier wall placed between the genders (same floor) and alarmed. If conditions for fire-safe barriers cannot be met, genders will be separated by floor, wing or building.

b. Supervisory measures:

(1) Noncommissioned officers supervise the barracks around the clock.

(a) Drill sergeants will serve as Charge of Quarters (CQ) on duty during sleeping hours in BCT and the BCT portion of OSUT. Soldiers in the rank of sergeant (E5) and above may serve as CQs in the RECBN.

(b) Noncommissioned officer cadre members, to include instructors, company personnel, and drill sergeants, can serve as CQs during sleeping hours in AIT and the AIT portion of OSUT.

(2) The CQ may be assisted by two enlisted soldiers who serve as "runners", and who maintain entrance security when the CQ conducts inspections. The two runners must be of the same gender, but do not need to be of the same gender as the CQ.

(3) Each gender-separate living area will have two fireguards who ensure no unauthorized personnel enter the area during sleeping hours.

(4) Duty officers and NCOs from the company, battalion, and brigade headquarters will conduct periodic checks.

(5) All soldiers will sleep in PT shorts and shirt.

(6) If an inspector is not of the same gender as the soldiers in the living area being inspected, the inspector must be accompanied by personnel of the same gender as the inspected area.

(a) In BCT, OSUT (Phases I, II, and III), and RECBN units, the personnel accompanying the drill sergeant or inspector cannot be an IET soldier.

(b) For OSUT (Phases IV and V), AIT, and DLIFLC, the person accompanying the drill sergeant or inspector may be an IET soldier, and could be one of the soldiers serving as a fireguard in the bay being inspected.

(7) During "lights out," only cadre leadership are allowed in the barracks.

c. On a case-by-case basis, AIT installation commanders and commandants may request from HQ TRADOC, ATTN: ATTG-IT, an exception to the physical security and supervisory measure requirements of the separate and secure policy. Commanders must certify that every attempt was made to comply with this policy, and its execution was found to be impracticable for units with small gender populations.

2-10. Buddy system.

a. The buddy system establishes policy for the pairing of IET soldiers into teams for the following reasons:

(1) Mutual support and assistance.

(2) Teaching teamwork.

(3) Development of a sense of responsibility and accountability for fellow soldiers.

(4) Improving safety during training.

(5) Reducing the likelihood and opportunity for sexual harassment, misconduct, and suicide gestures or attempts.

b. Soldiers are introduced to the buddy team system at the RECBN. Initial entry soldiers are formed into two-person teams upon arrival at the training unit. A buddy team may consist of three personnel in order to ensure all soldiers are part of a buddy team. Team members learn to help one another in all aspects of training. This aids in the development of individual initiative, responsibility, and dependability. As a minimum, installation commanders will establish a buddy system in IET following these guidelines:

(1) Drill sergeants will assign buddy teams after the IET soldiers arrive at the platoon, but before formal training begins.

(2) Unit cadre will instruct IET soldiers on the purpose and rules of the buddy system.

(3) Buddy team changes from the initial pairings should be limited.

(4) Buddy teams will participate in training, CQ, and other activities together, when feasible.

(5) Buddy teams will not be required to attend sick call or personal appointments together. Cadre will pair other soldiers of the same gender who are also reporting to sick call.

(6) Soldiers in Phase V+ (weeks 21 through completion) will not be required to be with their buddy after the end of the established duty day, unless approaching a cadre member for assistance.

(7) Male-female buddy teams are only authorized when there is only one IET soldier of a particular gender, and a same-gender battle buddy is not available. For example, a solitary female soldier would be teamed with two male soldiers; a solitary male soldier would be teamed with two female soldiers.

2-11. Military appearance.

a. All Class A uniforms will be issued during Phase II and properly fitted to the soldier prior to completion of IET. Drill sergeants will be present during fitting to ensure proper fit. Commanders will hold sufficient Class A inspections so that necessary refitting can be scheduled prior to the end of the training cycle.

b. IET soldiers must wear the Class A uniform at regular intervals to demonstrate to cadre satisfaction that they know the proper way to wear the uniform. Proper wear of headgear and tie will be emphasized. Before soldiers leave the IET area, cadre will ensure soldiers' uniforms are clean, pressed, and worn properly.

c. The cadre will stress the importance of maintaining standards in both appearance and actions, especially when in the civilian community. Soldiers must understand that they represent the Army when they appear in public in uniform.

d. Army policy prohibits any tattoo or brand on the face, neck, or head. Any other tattoos/brands that are visible and detract from a soldierly appearance while wearing the Class A uniform or are prejudicial to good order and discipline are also prohibited. The TRADOC policy concerning tattoos and brands is in appendix E. This policy applies to all non-prior service or prior service active, reserve, and National Guard soldiers.

2-12. Soldierization and reinforcement training in AIT/OSUT.

a. Initial entry soldiers must continue to receive the same strong emphasis on soldierization throughout AIT/OSUT that was present during BCT. This is to be accomplished through reinforcement training (focusing on drill and ceremonies, Army Values, teamwork, customs and courtesies, and wear of the uniform), inspections, increased demand of personal responsibility, a progressive PFT program, and role modeling by the drill sergeant and cadre.

b. Physical fitness requirements increase in AIT and the AIT portion of OSUT. Physical fitness training intensity will be increased throughout the cycle to meet the soldier's expectations and challenge the soldier's ability.

c. Command inspections will be conducted in the Class A uniform to ensure all soldiers maintain proper military appearance during IET.

d. The soldierization program in OSUT continues during all phases, with the basic soldiering skills being trained, reinforced, and evaluated throughout the POI.

e. Basic soldiering skills will be reinforced during AIT. Specifically, soldiers will be trained and evaluated on the Skill Level 1 tasks included on the annual Common Task Test (CTT). Units unable to test soldiers on specific CTT tasks due to non-availability of required material will select replacement task from appropriate Soldier's Manuals of Common Tasks. A commander in the rank of lieutenant colonel or above must approve use of replacement task.

f. Commanders are required to provide quarterly reinforcement training to IET soldiers on the Army Values and the human relations subjects introduced to them in BCT. Basic Combat Training TSPs can be accessed at the Fort Benning file transfer protocol site ftp://192.153.150.25/IET/. Drill sergeants will be the primary instructors for this training, supplemented with cadre/instructors to assist, as needed. Training will be conducted in platoon-size elements or smaller.

g. Initial entry soldiers will receive training on designated subjects based on the length of their course/cycle. The three reinforcement training plans are depicted in table 2-2.

h. In courses greater than 23 weeks in length, commanders have the discretion to modify or adjust the number of subjects taught in the additional quarterly reinforcement training sessions if course completion will occur prior to the end of a full quarter. When determining which subjects should be taught, the commander should base the decision on the number of training weeks included in that quarterly period, and on the particular subjects he/she believes need to be reinforced with his/her soldiers.

Table 2-2
Reinforcement training

Subjects/Hours	IET Weeks 10-17	IET Weeks 18-32	IET Weeks 33-completion
Museums (Branch related)/**2 hours**	X		
Branch History/**1 hour**	X		
Army Core Values/**1 hour**	X	X	**Quarterly**

Equal Opportunity (EO)/Prevention of Sexual Harassment (POSH)/**4 hours**		X	**Quarterly**
Comply with Uniform Code of Military Justice (UCMJ)/**1 hour**		X	**Quarterly**
Spiritual/Emotional/ Mental Fitness/**1 hour**		X	**Quarterly**
Serve as a Member of a Team/**3 hours**		X	**Quarterly**
Manage Personal Finances/**2 hours**		X	
Rape Prevention/**1 hour**		X	

2-13. Initial Entry Training cadre/support personnel training.
a. In addition to drill sergeants, other IET unit cadre have major roles in creating and maintaining a positive IET environment that assists with the transition from volunteer to soldier. Drill sergeant training is conducted IAW TRADOC Reg 350-16. Training of other IET cadre/support personnel will be conducted in the following four courses:

(1) TRADOC Pre-Command Course (TRADOC PCC).
(2) Cadre Training Course (CTC).
(3) Support Cadre Training Course (SCTC).
(4) Installation Staff Contractor's Training Course (ISCTC).

b. Specific implementation guidance on the training required for all IET cadre and support personnel is provided at appendix F.

2-14. Risk management. Commanders and trainers of IET soldiers will utilize the principles and procedures established in FM 100-14, Risk Management. Commanders will ensure cadre receive risk management training prior to their assuming sole control over the IET soldier. The risk management process assists commanders in making informed, conscious decisions on eliminating unnecessary risks and in accepting residual risks inherent in accomplishing the mission.

2-15. After Action Reviews (AARs) and sensing sessions.
a. Initial Entry Training commanders will establish a program for the conduct of AARs and sensing sessions for each training cycle (or class in AIT). The AARs are for cadre,

and the sensing sessions are for IET soldiers. The purpose is to provide all levels of command an assessment of the training program, to include the strengths and weaknesses of the organization.

b. After Action Reviews will:

(1) At a minimum, be conducted at company and battalion level.

(2) For BCT/OSUT, company level AARs will be held at the end of each phase. Battalion level AARs will be held at the end of each cycle.

(3) For AIT, the senior IET commander will determine the appropriate intervals for conduct of AARs.

(4) The focus of the AARs must be on the quality of the training program, not on company averages or other numerical comparisons.

c. The commander will conduct the AARs and will review, as a minimum, performance in the following areas:

(1) Phase goals and objectives.
(2) Quality of values training.
(3) Quality of teamwork development effort.
(4) Basic rifle marksmanship program.
(5) Individual tactical training periods.
(6) Physical fitness training program.
(7) Field training exercise.
(8) Phase Testing.
(9) Discharges and restarts by type.
(10) Stress identification and management.
(11) Management of the heat/cold injury prevention program.
(12) Training injuries, safety program, and risk management.
(13) Treatment of soldiers by cadre.
(14) Quality of committee group instruction.
(15) Quality of facilities used by soldiers.
(16) Conduct of reinforcement training.
(17) Unit equal opportunity and prevention of sexual harassment programs.
(18) Integration and reception.
(19) Nuclear, biological, and chemical training.

d. Sensing sessions with IET soldiers are an effective means for assessing command climate and provide leadership a forum for identifying and resolving problems.

(1) At a minimum, sensing sessions will be conducted at the company and battalion level.

(2) Sensing sessions will be held at mid-course and at the end of each cycle.

2-16. Tobacco cessation policy for IET.

a. Initial entry soldiers will not use tobacco products. This policy is in effect when the soldier arrives at the RECBN and remains in effect until the soldier graduates from IET or reaches Phase V+, 21-plus weeks. Exceptions to this policy are not permitted. The

commander may authorize smoking privileges for reclassified and prior-service soldiers returning to AIT or Phase IV of OSUT as part of a reclassification or enlistment action. These soldiers will adhere to the requirements outlined in paragraph 2-17c(6) below.

b. All cadre and soldiers with permanent party privileges will be prohibited from using tobacco products in areas where IET soldiers are likely to observe such use.

c. Sales of tobacco products from vending machines in IET areas will be eliminated to the extent possible, consistent with the requirements of existing contracts.

d. Instruction on the adverse impact tobacco use has on health and readiness is presented to BCT and OSUT soldiers as prescribed in the physical readiness training and testing annex of the BCT POI. Program of instruction proponents will incorporate similar instruction into AIT fitness and substance abuse training.

e. Installations will coordinate with the supporting contracting office to ensure contractor personnel comply with this policy.

f. Since this policy may constitute a change in working conditions for civilian employees, installations are reminded of their bargaining obligations with the unions that represent those employees. Prior to implementing this policy, the local Civilian Personnel Office should be contacted for assistance in carrying out labor/management relations responsibilities.

g. This policy does not cancel or supersede other instructions where smoking is controlled because of fire, explosive, or other safety considerations.

2-17. Reclassified/prior-service soldiers.
a. Reclassified and prior-service soldiers are those individuals in any rank who have previously completed IET and are attending Skill Level 1 training in IET units as a result of reclassification or enlistment actions. Reclassified and prior-service soldiers are not considered to be IET soldiers; however, they will be assigned to IET units. This definition does not apply to those soldiers who failed to complete the requirements for the award of a MOS as part of the initial IET process. Reclassified and prior-service soldiers must meet all course requirements for graduation (e.g., APFT, etc.) and are subject to IET policies unless otherwise stipulated in this regulation.

b. In accordance with AR 601-210 and National Guard Regulation (NGR) (AR) 600-200, the following prior service guidelines will apply:
(1) Prior service Air Force, Navy, or Coast Guard personnel (except those entering or already in the National Guard) who have not completed a U.S. Army BCT Course or U.S. Marine Corps Basic Training Course, must attend BCT at an ATC.
(2) All prior service applicants (except those entering or already in the National Guard) will be retrained in BCT if they have had a break in service of three or more years.

(3) Soldiers entering or already in the National Guard may attend AIT without attending Army BCT if they have completed any BCT course IAW NGR (AR) 600-200. However, if a commander determines that such a soldier is failing to progress in training due to a lack of basic soldier skills, the commander will counsel the soldier and permit the soldier to attend BCT voluntarily. This counseling will occur prior to any separation action against the soldier. Commanders will coordinate with the National Guard Liaison Officer (LO) at the installation and the National Guard sending unit prior to the soldier's voluntary attendance at BCT.

(4) Prior service personnel who enlist for a MOS held during their previous enlistment, and who have less than a 3-year break in service, will be assigned directly to operational units.

(5) Prior service personnel who enlist for a MOS not previously held, and who have less than a 3-year break in service, will attend AIT in the new MOS. If the new MOS is taught in the OSUT mode, the person will enter training at a point at which all MOS training may be accomplished.

c. Duties/responsibilities.

(1) Commanders may take advantage of the experience and leadership abilities of reclassified and prior-service soldiers and use them to augment their cadre. However, the primary duty of reclassified and prior-service soldiers is to attend training and become technically proficient in their new MOS. They will not be assigned additional duties normally performed by permanent party personnel.

(2) Noncommissioned officers undergoing Skill Level 1 training in IET will be utilized as NCOs, but will not perform drill sergeant duties.

(3) Prior-service NCOs in training may assist with IET soldiers with regular cadre oversight after appropriate orientation and certification by unit first sergeant/commander on TRADOC policy regarding leadership and treatment of IET soldiers.

(4) There is no requirement for reclassified or prior-service soldiers to receive reinforcement training on common skills (taught in BCT or early OSUT). However, AIT/OSUT commanders will evaluate each soldier's proficiency in all areas (not just MOS subjects) and ensure training is provided as required. Reclassified and prior-service soldiers who are proficient in common tasks may be used as demonstrators and assistant instructors. Reclassified and prior-service NCOs may be used as assistant evaluators in training IET soldiers.

(5) Initial entry soldiers will not be billeted with reclassified and prior-service or permanent party soldiers. If installations cannot meet this provision, exceptions to policy must be requested from HQ TRADOC, ATTN: ATTG-IT. Commanders may integrate reclassified and prior-service personnel with IET soldiers during training to enhance training by taking advantage of their knowledge, experience, and leadership abilities.

(6) Privileges for reclassified and prior-service personnel.

(a) Although reclassified soldiers are subject to IET policies and procedures, their privileges will be the same as those of permanent party members of equal rank. They will be treated with the dignity and respect due their rank.

(b) Specific privileges will be determined by the unit commander based on such factors as rank, training performance, self-discipline, motivation, and conduct.

TR 350-6, para 3-3. Modifications to training programs.
a. The time allotted for subjects in a POI may vary depending on the aptitude and achievement levels of each group of soldiers, the number of soldiers in each cycle or class, the instructor-to-student ratio, and the availability of facilities. For these reasons, adjustments may be made to the amount of time devoted to a task provided the learning objectives and performance standards are met and the overall course length remains unchanged.

b. Headquarters, TRADOC, ATTN: ATTG-IT, will be informed of temporary changes to IET training programs that do not require a revision to the POI. Information provided will include the purpose and nature of the temporary change or planned pilot, its duration, and the number of students involved. Army training centers will coordinate plans for such pilots with proponent schools. A risk assessment will be conducted in support of temporary changes to identify any new hazards, changes in residual risk, and appropriate hazard controls and/or risk countermeasures necessary to ensure training safety. The supporting safety office will review and validate the risk assessment.

c. Army training center commanders' recommendations are an important part of the continuing POI review and update process. Army training center commanders will submit recommended POI changes to the appropriate schools. The schools will evaluate these recommendations and, if appropriate, revise course materials, individual training plans (ITPs), course administrative data (CADs), and POIs IAW TRADOC Reg 350-70. *The proponent school commandants will make the final decision on task selection and training methods.*

TR 350-6, para 3-5, Training schedules.
a. The training week is managed through the training schedule. The principles of scheduling are outlined in FM 25-101. Local directives and the following guidelines will govern non-training time:
(1) In garrison, IET soldiers will have the opportunity for 7 hours of continuous sleep per night, unless the soldier is scheduled for duty (i.e.; fire guard or CQ runner). During field training, the length of the training day and time for sleep will vary based on tactical and other training requirements, as established in the appropriate POI. Commanders will ensure that the tactical framework of field training allows sufficient time for rest.
(2) In garrison, soldiers will be given at least 1 hour of preparation time each day to take care of personal needs. During this time, soldiers will not receive training.
(3) Soldiers will be afforded the opportunity to attend a religious service weekly.

b. Unless authorized by the installation commander, POI training will not be conducted on Sundays. Activities required to prepare for the next week's training may be conducted after 1300.

c. Unless authorized by the installation commander, core training requiring post assets will not be conducted on Saturdays or Federal holidays.

FM 25-101, Page 3-34 (Figure 3-31), Sample RC Monthly Tng Schedule.
- See Next Page -

Sample RC monthly training schedule—transportation heavy truck company

Unit Training Schedule	Unit 333d Transportation Motor Transport Co		ARTEP/MTP 55-188-30		DATE:7 June XX	
	Station		Inclusive Dates: From 7 Oct XX		To 9 Oct XX	
When	Who	What	Where	Trainer	Reference	Remarks/Uniform
Friday 7 Oct 1800	All	Draw CPOG,Weapon, LBE	Co Area	Cdr, 1SG	Co SOP	BDU, LBE, Mask, Rifle
1900-1930	All	Formation, Premovement checks, PMCS	Co Area	1SG, Plt Sgt	Co SOP	BDU, LBE, Mask, Rifle
2000-2130	All	Road March to Fort AP Hill			55-2-0001 63-2-0002 71-2-C326R	BDU, LBE, Mask, Rifle
1900-2130	Co HQ(-)	Conduct Quartering Party Operations	Ft AP Hill	XO	55-2-0003	BDU, LBE, Mask, Rifle
2130-2230	All	Occupy New Operating Site Establish Area of Defense	Ft AP Hill Ft AP Hill	Cdr, 1SG Cdr, 1SG Plt Sgts	55-2-0004 55-2-0005	BDU, LBE, Mask, Rifle BDU, LBE, Mask, Rifle
2230	Plt Ldrs/ Sgts	Troop leader review of days activities		Cdr, 1SG	Co SOP	BDU, LBE, Mask, Rifle
Saturday 8 Oct 0600-0700	All	Personal Hygiene/Breakfast	Ft AP Hill	1SG, Plt Sgts Mess Sgt	Co SOP	Chow = A Rations, Tactical feeding by platoon Maint, HVY, MED, LT, HQ
0700-1200	LT, MED, HVY, Trk Plts	Defend Convoy -Battle Drills 1,3,4	AP Hill (TNG Area 46A)	Cdr Plt Sgts (LT MED, Trk)	55-2-0002	Battle drills are from ARTEP 55-188-30
		-Battle Drills 1,5,6,7		Plt Sgts (HVY Trk)		
1200-1300	All	LUNCH (MREs)	AP Hill (TNG Area 46A)	Cdr, 1SG		
1300-1600	LT, MED, HVY, Trk Plts	Defend Convoy Continued	AP Hill (TNG Area 46A)	Cdr, 1SG, Plt Ldrs, Plt Sgts	55-2-0002	

Figure 3-31.

Tab 9

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Standard 9 Reference Excerpts

TR 350-70, Student Performance Measurement/Testing.
VI-7-2. Administrative Information

Purpose

a. Tests are used for evaluating individual training in resident and extension training. Their purpose is to ---

(1) Ensure students can accomplish or have learned what they were supposed to accomplish or learn.

(2) Ensure students are qualified prior to ---

(a) Commencement of training (ensure prerequisites are met).

(b) Progression to the next training level, phase, etc.

(c) Graduation from the training.

(d) Award of a Military Occupational Specialty (MOS), Additional Skill Identifier (ASI), Area of Concentration (AOC), Language Identifier Code (LIC), etc.

(3) Accurately assess student achievement against established, preset standards (criterion referenced testing).

(4) Improve training by ---

(a) Validating the effectiveness of training.

(b) Identifying areas within training that needs improvement.

(c) Motivating, challenging, and encouraging students to learn.

(5) Confirm or certify as appropriate that the student is competent in the job (can perform tasks to established, preset standards).

(6) Focus training where it is needed and save training time and resources by ---

(a) Providing a means to test-out of portions of or all of a course.

(b) Enabling unit training to concentrate on identified soldier performance deficiency(ies).

(c) Enabling an individual to concentrate on personal performance deficiency(ies) for self-development purposes.

(7) Assist in determining training effectiveness.

(8) Assist in determining if training teaches what it is supposed to teach.

References

b. Required regulatory guidance:

(1) TRADOC Reg 351-18, Total Army School System

(2) Other chapter, this regulation, Chapter VI-6, Training Course Design

Definitions

c. See Glossary for TD-related terms. Terms specific to student performance measurement/testing are as follows:

- Test
- Validity
- Reliability
- Content validity
- Predictive validity
- Criterion-referenced test
- Norm-referenced test
- Written performance test
- Hands-on performance test
- Testing out
- Discrimination
- Pretest
- Placement test

• Performance-based test

Responsibilities

d. See Appendix B, Responsibilities, for top-level responsibilities. The following responsibilities pertain specifically to student performance measurement and testing:

Activity	Responsibilities
(1) HQ TRADOC, Deputy Chief of Staff for Training (DCST)	Provides student measurement/testing policy and guidance. (ATTG-CD)
(2) ***Commander, Army Training Support Center (ATSC)***	(a) Determines reliability and validity of correspondence course tests and test items. (b) Notifies proponent schools of correspondence course tests and test items reliability and validity results. © Provides assistance as required to the DCST or Training/TD (Task) Proponents in the --- 1 Establishment of the standards for test development. 2 Provision of criterion-referenced performance test development training as part of the Staff and Faculty Development Programs. 3 Development of test and test item analysis standards and procedures.

(3) Commanders/ Commandants, Training/TD (Task) Proponents	(a) Determine testing requirements and types of tests that will accomplish the purpose for testing, and develop a test plan (see paragraph "Test Plan"). *(b) Develop a student evaluation plan for each training course.* *(c) Design and develop criterion-referenced, performance or performance-based tests to determine student competency and ensure student can accomplish the objectives.* 1 Include considerations for risk management, fratricide prevention, and environmental protection when designing tests. 2 Maintain a pool of test items sufficient to develop at least two versions of each test. *3 Prepare a test administration guide for each test to standardize test administration.* (d) Maximize use of pretests (diagnostic) for testing-out to minimize training length. Build pretests into every CBI program. (e) Include time in resident training to review the test with students. *(f) Provide testing materials directly to appropriate course managers for training implemented at training institutions other than the proponent school, e.g., managed through the TASS training battalions or presented at another TRADOC school.*

VI-7-2. Administrative Information Responsi-bilities

Activity	Responsibilities
(3) Commanders/ Commandants, Training/TD (Task) Proponents (continued)	*(g) Analyze tests and test items to ensure they are reliable, valid, and that they discriminate between student performance levels.* (h) Implement the appropriate level of test and test item control. See "Test Control," this chapter. To accomplish this, proponents will ---

1 Maintain security of all test items, tests, test administration instructions (if necessary), checklists, scoring keys, and test results during test development, transmittal, storage, retrieval, and administration consistent with the appropriate level of test control as determined by applying the guidelines in “Test Control,” this chapter.

2 Develop and specify in a lesson plan, Test Administration Guide, the Student Testing Plan, and/or separate Test Control Standard Operating Procedure (SOP) (if desired) the exact procedures to be followed during resident test administration to ensure the proper level of test control.

3 Regardless of how final test/test items will ultimately be administered, restrict access to paper-based copies of proposed or final test items, scoring/answer keys, or test results to those personnel demonstrating a valid need for the information.

4 As necessary, develop and specify, in conjunction with information management specialists, procedures to ensure electronic copies of tests/test items and scoring/answer keys are protected from unauthorized disclosure. These procedures ---

a Must include ---	b May include ---
Restrictions on access, reproduction, and distribution.	Authentication methods.
Password protection.	Encryption technologies.
Required student certifications. See “Test Control,” this chapter.	System intrusion detection/ prevention.

5 Immediately investigate and reduce the impact of test/test item compromises or suspected compromises.

6 Ensure the test is administered exactly IAW the test administration instructions.

7 Ensure test control procedures include a method to determine with reasonable assurance the identity of the test taker.

	Note: Proponents do not have to follow the procedures outlined in AR 611-5 for security and control of test items but may use these procedures as guidelines for developing their specific procedures consistent with the level of control required.

TR 350-6, para 3-31.

3-31. Testing procedures for AIT and the MOS portion of OSUT.

a. Proponents will develop within-course tests (end-of-annex/block/module) for MOS-producing courses according to guidance outlined in TRADOC Reg 350-70. The validity of each task being evaluated and its relevance will be continuously assessed and changed or modified as appropriate.

b. Commanders will ensure soldiers are tested IAW the SEP for the course being presented. Guidelines for development of SEPs are outlined in TRADOC Reg 350-70, Chapter VI-7, Student Performance Measurement/Testing. The SEP informs soldiers, instructors, and other personnel of the course graduation requirements. A copy of the SEP must be explained to each IET student at the beginning of each course and prominently posted on the bulletin board.

c. Within-course tests must provide a fair and accurate evaluation of the soldier's ability to perform the tasks presented to established standards.

d. Hands-on, performance-oriented testing will be the norm throughout TRADOC. If situational-based, open-book reference written tests are used, they must require the student to not only extract data, but also to apply the data to specific situations likely to be encountered on-the-job. Closed-book, knowledge-based written tests should be used only if it is necessary to verify the learner's knowledge as a prerequisite for later performance testing where the knowledge must be used (e.g., as a building block to later tests). All testing should be conducted in an environment that would replicate the soldier's duty position in the unit in so far as safety and environmental considerations will allow and IAW test administration instructions.

e. Each test will have at least two versions. All versions may be used concurrently.

f. Tests will be monitored by quality control personnel reporting to the brigade or ATC commander, as determined by the local commander. Unit cadre personnel must be certified IAW TRADOC Regs 350-70 and 350-18 before they are permitted to participate in the testing process.

g. Tests will be scored on a "GO/NO-GO" basis. The passing ("cutoff") score for making the "GO/NO-GO" determination will be determined during test design and validation, and will be documented within the course Student Evaluation Plan.

h. Counseling will be conducted with each soldier to reinforce strengths on tasks accomplished, and to correct weaknesses on tasks missed.

i. The goal should remain 100 percent performance to standard on all tasks by each soldier. Soldiers who are unable to achieve this goal should be considered for remedial training and re-testing prior to graduation, or reassignment to another company in a follow-on cycle.

j. Remedial training is a joint responsibility of students and trainers. As such, students failing to achieve task/course standards must be provided opportunities to review material, and practice skills prior to undergoing retest. Trainers must provide appropriate remedial assistance as necessary.

k. Re-testing will include all tasks failed.

l. In accordance with the Student Evaluation Plan, IET soldiers who fail an end-of-annex/block/module retest are prohibited from progressing further in the course and should be considered for new start to a follow-on class or elimination.

Tab 10

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TRADOC Memorandum dated Oct 06, 2001 Subject: Student Academic Measurement/Testing Policy Guidance.
Encl. 4
Test Control Policy and Procedures

1. Philosophy:

a. The philosophy of test control is to apply appropriate measures to reduce the possibility of test compromise to an acceptable level, without unduly burdening personnel or functions. This philosophy is based upon the elements listed in paragraphs b. -e. below.
b. As we move towards more performance testing, and performance-based tests being embedded into electronically delivered courseware, the need for elaborate test control procedures have significantly decreased.
c. Although the possible seriousness of test compromise may be extreme (that is, certifying a non-performer as actually knowing how to perform), normally, before life, mission, or equipment is put at risk, it is likely that the former student will be evaluated, coached, and/or observed. This ensures the certification he/she obtained in institutional training is accurate and transferable to the job or to later learning activities.
d. All staff and faculty members of the administering activity are in a trusted position and are expected to exercise due caution and common sense in the handling of sensitive test materials.
e. Furthermore, as part of their oath of office, students in any evaluated learning environment have the clear and undeniable responsibility, under penalty of applicable laws/regulations, not to give or receive unauthorized information or assistance.

2. Definitions:
a. IAW TR 350-70, "test control" is the application of security measures to protect tests and test items and related sensitive material from unauthorized disclosure from the time of their creation until they become obsolete or are destroyed.

b. *Test :* A device, technique, or measuring tool used to—
(1) Determine if a student or group can accomplish the objective to the established standard.
(2) Determine if training does what it is designed to do efficiently and effectively.
(3) Measure the skill, knowledge, intelligence, competencies, or other aptitudes of an individual or group.
(4) Collect data as a basis for assessing the degree to which a system meets, exceeds, or fails to meet the technical or operational properties ascribed to the system.

c. *Sensitive test material:* Any student measurement/testing material that by its nature must be controlled to assure the validity of the test responses. Without this assurance, the goals of testing cannot be accomplished. *Sensitive material may include, but not be limited to: individual test items, test booklets, test administration guides, adjunct test*

material, "scratchpads" and "notes", checklists, and scoring keys used for performance and performance-based exercises and tests.

3. Purpose & Applicability:

a. This document provides guidance and procedures for the proper control of student performance measuring instruments (tests), test items, and related sensitive material, such as specific scenarios and scoring keys.

b. Although primarily intended for active and reserve component test administrators, and other test instrument handlers at the testing site/institution, it also provides information and requirements critical to test proponents, reproduction and transmittal activities, and any other activities/personnel who may handle sensitive test materials.

c. If needed for administrative ease or standardization and for reduction in test compromises, local test administering activities may establish additional internal test control procedures beyond those required in this SOP. All developing activities must used due care to ensure the procedures can be shown to be of significant value in reducing test compromises without unnecessarily administratively burdening, delaying, or costing personnel or other training/education functions.

d. Security of classified tests will be handled in accordance with the appropriate regulations (AR 380-5) and are not further addressed in this SOP.

4. Responsibilities:

a. The primary responsibility for ensuring inappropriate disclosure/acquisition does not occur, logically and legally rests upon the student. Any student who illegally acquires controlled test materials, and/or unintentionally acquires test material and uses/transmits the material illegally, have violated their oath and must be dealt with harshly, swiftly, and convincingly. *Students must be directed to report/identify all possible test material handling situations that might lead to inadvertent test compromise.*

b. All personnel who may intentionally or unintentionally come in contact with sensitive test materials have the responsibility of reducing the possibility of unintentional disclosure of test items or materials (i.e., test compromise). In particular, the staff and faculty of the test administering activity have a primary role in implementing these procedures.

c. All commanders, staffs, department/division heads, instructors, and other personnel who might come in contact with sensitive test materials have the responsibility for limiting test material access to those individuals having an absolute "need to know" status. As with classified material, rank or position should not be the primary determining factor in determining "need to know".

d. As stated in TR 350-70, Commanders/Commandants, and Training/TD (Task) Proponents are responsible to implement the appropriate level of test and test item control. This requirement applies to all activities that may have sensitive test material under their control that must be secured. See Para. 5 below and the remainder of this document for full explanation of what this means for the test administering organization.

5. TRADOC Regulation (TR) 350-70 Regulatory Guidance:

a. For comprehensiveness, the applicable regulatory guidance pertaining to Test Control, as found in TR 350-70, is reiterated below. To accomplish the implementation of the appropriate level of test and test item control required by TR 350-70, administering organizations must:

(1) Maintain security of all test items, tests, test administration instructions (if necessary), checklists, scoring keys, and test results during test development, transmittal, storage, retrieval, and administration consistent with the appropriate level of test control as determined by applying the guidelines in "Test Control," (see para. below).

(2) Develop and specify in a lesson plan, Test Administration Guide, the Student Testing Plan, and/or separate Test Control Standard Operating Procedure (SOP) (if desired) the exact procedures to be followed during resident test administration to ensure the proper level of test control.

(3) Regardless of how final test/test items will ultimately be administered, restrict access to paper-based copies of proposed or final test items, scoring/answer keys, or test results to those personnel demonstrating a valid need for the information.

(4) As necessary, in conjunction with information management specialists, develop and specify procedures to ensure electronic copies of tests/test items and scoring/answer keys are protected from unauthorized disclosure. These procedures:

Must include ---	**May include ---**
Restrictions on access, reproduction, and distribution.	Authentication methods.
Password protection.	Encryption technologies.
Required student warnings/certifications.	System intrusion detection/ prevention methods.

(5) Immediately investigate <u>suspected</u> compromises and take appropriate actions to reduce the impact of test/test item compromises.

(6) Ensure the test is administered exactly IAW the test administration instructions.

(7) Ensure test control procedures include a method to determine with reasonable assurance the identity of the test taker.

b. As found in TR 350-70, the following general guidelines should be used for the control of tests:

If the test/test item …	Then the test/test item requires …
(1)Mirrors the task/TLO and must always be performed in exactly the same way	No security measures for adequate test control. For example, Perform CPR, disassemble an M-16A1, etc.
(2)Has only a few possible variations.	That all-possible variations MUST be protected from unauthorized disclosure.
(3)Has many possible variations.	Security measures sufficient to avoid making known to the individual student the specific variation that s/he will receive. (i.e., due to its size, making known the entire domain of possible test items will not be detrimental to student testing). For example, for testing purposes a student is required to repair 5 of 30 possible common-occurring faults in a microcomputer. Making known to the student the entire domain of 30 faults is unimportant, but once a particular subset of 5 faults is assigned for that student to be evaluated on, the subset must not be made known to the student until appropriate.

c. The designation of whether a test/test item is a Type 1, 2, and 3 above is solely the responsibility of the test designer (proponent).

6. Test Proponent Responsibilities: The test proponent must designate adequate procedures to ensure test security when mailing sensitive test material. The following controls should be applied by the test development/reproduction activities and are provided for information to test administering activities. If these controls are not already applied to the tests you receive, apply them immediately (if possible) and/or contact the test development/reproduction activity.

(a) Each page of all sensitive test material which must be controlled (i.e., except for Type 1 IAW the matrix above) must be clearly labeled *"FOUO- Sensitive Examination (Testing) Materials"*, or similar words, to clearly indicate their nature. This includes paper copies or portable disks/diskettes (floppies/ZIP/CD). Paper files containing test materials should be labeled similarly as well.

(b) The first page of all controlled testing material, whether paper or electronic (when displayed on the screen) in nature, must have the label indicated in 6(a) above. It is highly recommended that paper versions of tests have the warning on each page as well as the cover sheet.

(c) All electronic versions of sensitive test material should have the warning in 6(a) above as well as the warning "DO NOT COPY, PRINT, TRANSMIT, OR SAVE UNLESS SPECIFICALLY AUTHORIZED" (or words to this effect) on any portable medium and on first page/screen seen when opening the file.

7. Test Administration Control Requirements:

a. *Common Controls:* The following common controls should be implemented by the administering activity for all test materials and test administration situations:

(1) Every student's identity must be positively verified before test administration.

(2) Before the administration of the first test in a course (usually at the beginning of each course/separate phase), all students must be advised of the following:

(a) they will not acquire or provide inappropriate assistance either before, during or after any test, except as instructed (i.e. for group activities).

(b) they will report any unauthorized assistance (either before, during, or after the test administration) of which they may have knowledge.

(Note: For legal reasons, first-time notification (i.e., during course inprocessing) should be in writing and acknowledged by the student. Student signature on acknowledgment is highly recommended. Reiteration of the above before each test is recommended.)

(3) As a minimum, sensitive test material must be secured IAW the following guidance:

(a) Commanders/managers will ensure a responsible party (a Unit Test Control Officer, course manager, instructor, Distributed Training Facility Manager, etc.) is assigned to control access to sensitive testing material from receipt to return or destruction.

(b) Assess to all sensitive test items will be controlled based upon a clear and verifiable need, and access will be limited to the fewest individuals feasible, consistent with efficient operations.

(c) Sensitive paper-based test material and portable diskette/CD/ZIP disk-based test material will be secured in locked containers or cabinets. Proper key control to these sensitive containers must be exercised as with other sensitive keys.

(d) IAW specific procedures and methods indicated in local SOPs, sensitive test materials will be inventoried at least quarterly and a record made of the inventory. Additional inventories may be necessary upon reproduction of exam booklets. Training institutions will specify maintenance procedures for inventories.

(e) Each time sensitive test material (whether paper-based or disk-based) is removed from its locked container, a record of sign-out (name, organization, etc,) will be made.

(f) Whenever sensitive materials are destroyed or transferred a record will be made of:

1 Date of Transfer or Destruction
2 Method of Transfer or Destruction
3 To whom the material was transferred; or who was responsible for destruction.
4 The exact material destroyed or transferred.

b. Matrix for Application of Additional Controls:

In addition to the common controls the following controls must be applied as indicated.

Form/Media	Controls to be Applied
Hands-0n Tests that Mirror Task *See narrative for explanation	No controls necessary for test control purposes.
Courseware Embedded Tests/Material (stored only on servers)	Common Controls.
	Secure Electronic Files through password protection (and secure passwords).
	Restrict access when viewing material on-screen.
	Allow NO unauthorized copying/printing/transfer/storage of files.
	If possible, randomly assign test versions and various versions of individual items/sets to students.
Portable Diskette/ Disk-based Test material(floppy/CD/ZIP)	Common Controls.
	Do not store material on, or transfer to, an uncontrolled system.
	Electronically secure storage medium (diskette/CD-ROM) via at least password protection (and secure passwords); and physically secure disk/diskette under lock in a lockable container.
	Restrict access when viewing material on-screen.
	Allow NO unauthorized copying/printing/transfer/storage of files.
Paper-and-pencil Tests	Common Controls.
	Keep all copies of all sensitive materials under lock on a lockable container.
	Make sufficient copies immediately before first administration. Make additional copies only if necessary and immediately before subsequent administrations.
	Make minimum copies required for single administration.
	Destroy extraneous/unneeded materials by shredding or burning.
	Randomly assign alternate forms.
	Allow NO unauthorized copying/scanning of material.

8. Actions for Loss, Compromise, or Possible Compromise of Sensitive Test Materials:

The following guidance is provided if test compromise is suspected:
a. Every incidence of suspected unauthorized disclosure of sensitive test material must be investigated, and the compromise substantiated, refuted, or left unsubstantiated. If the possible compromise is refuted, no further action is necessary.
b. As determined necessary by the department/division head/commander or other designated authority, report the compromise/potential compromise to your chain of command. If needed for assistance, the compromise/potential compromise may also be

reported to the proponent school. The test proponent may advise on appropriate procedures to mitigate the risk.
c. The commander/other designated authority will:
(1) Insure that a thorough investigation of the compromise, possible compromise, or loss has been made and that proper actions are initiated to prevent recurrence of loss or compromise of test materials.
(2) Decide the risk mitigation factors to be employed.
(3) Maintain a record of the results of the investigation and actions taken, if any.
(4) If warranted, initiate investigation under AR 15-6.
d. If the compromise is substantiated or cannot be definitely refuted (i.e., suspected but unsubstantiated), a risk assessment must be done immediately (based upon the level of control required of the test), and any serious consequences from the loss must be mitigated. At the discretion of the department/division head or other designated authority, the procedures for mitigation should include, but not be limited to, one or more of the following:
(1) Withdrawal of the test from use.
(2) Re-testing of one or more students using non-compromised/unsuspected versions.
(3) Requesting assistance from the proponent school.
(4) Take no action (i.e., in the case of unsubstantiated).

9. Actions for Destruction, Transfer, and Loan of Sensitive Test Materials:

a. Destruction of test materials. Test materials that are no longer needed by the administering activity must be destroyed immediately by the test administering activity, IAW such procedures as they may determine based upon the medium of the material (i.e. burning, purging of files, reformatting diskettes, etc.).

b. Transfer of test materials. Test administering activities may transfer surplus tests to another activity that needs them. The activity commander/other designated authority must approve and monitor all transfers of sensitive test materials.

c. Loan of test material. When a need arises, the activities may borrow a common use test from the nearest active duty, National Guard, or Army Reserve activity. In such cases, the activities involved must take proper security precautions in transferal of the test material.

10. Actions for Test Control during Administration:

a. In addition to the applied controls as indicated above, the primary means of test control during actual administration is by following the proponent instructions precisely, as found in the test administrative instructions for each test.

b. Specific directions for test administration and scoring are contained in manuals that accompany each test or in the student evaluation plan or test administration plan.

These procedures must be followed strictly. Test examiners and proctors will use only proponent test materials in preparation for or during the administration of tests.

c. If (in the opinion of designated authority) any aspect of test security or administration is unclear or unmanageable, test administrators must immediately contact the test proponent for additional guidance before administration.

11. Point of Contact for Additional Guidance:

a. The point of contact for any questions regarding test administration and control procedures provided with the test is the training development proponent activity for that test.

b. The proponent for this policy is the Training Development and Analysis Activity, Deputy Chief of Staff for Training, ATTG-CD, U. S. Army Training and Doctrine Command, Ft. Monroe, VA 23651. Any questions should be addressed to the above or to tylere@monroe.army.mil, DSN 680-5464, Com: 757-728-5464. Any recommended changes should be sent to the above or to the proponent for this policy, preferably electronically, with all DA 2028 information included (in particular, rationale for any changes).

TR 350-70, para VI-7-7, Test Control.

Description a. **Test control ---**

(1) Is the application of security measures to protect tests and test items and related sensitive material from unauthorized disclosure from the time of their creation until they become obsolete or are destroyed.

(2) Ensures each student has a fair and equal opportunity for successfully completing the test.

(3) Covers hands-on, automated, and paper-based testing.

(4) May vary based upon ---

(a) How the test is administered (hands-on, paper-based, or computer-based).

(b) The number of different test items which may be constructed to measure the TLO/ELO.

Philosophy b. The necessity for test control measures is greatly reduced by the implementation of criterion referenced, performance testing. The student must be told exactly what performance is required of him/her at the end of a training (i.e., via the TLOs/ELOs and Student Evaluation Plan), all training and practices must match these objectives, and performance tests/test items exactly match the performance required by the TLOs/ELOs.

Guidelines c. The following guidelines should be used for the control of tests:

If the test/test item …	Then the test/test item requires …
(1) Mirrors the task/TLO and must always be performed in exactly the same way (i.e., Disassemble the M16A1 rifle).	***No security measures for adequate test control.***
(2) Has only a few possible variations.	***That all possible variations MUST be protected from unauthorized disclosure.***
(3) Has many possible variations.	Security measures sufficient to avoid making known to the individual student the specific variation which he will receive. (i.e., due to its size, making known the entire domain of possible test items will not be detrimental to student testing).

Required Certifications

d. No matter what type of test is used, the test **must** have a way for the student to certify that he/she ---

(1) Has received no unauthorized assistance in answering the test items or performing the test requirements, and

(2) Will not divulge the contents of the tests or test items (except in the case of a test/test item that meets the requirements of above paragraph, "Guidelines").

TR 350-70, Apx E.

Appendix E

Lesson Plan, Training Support Package (TSP), and Course Management Plan (CMP) Formats and Components

Introduction

a. This appendix provides standardized Lesson Plan Format (E-1); Common/Shared Task TSP Introduction Format (E-2); Training / TATS Course TSP Format/Components (E-3), Course Management Plan (CMP) Format (E-4), and Optional Formats (E-5).

Note 1: See Chapter VI-6, Training Course Design, for detailed guidance on development of these products.

Note 2: All "Notes" within boxes and all information within brackets in the following formats are directed toward the training developer, not the instructor. All other "Notes" are to be included in the documents and are directed toward the instructor.

b. Developers must identify the appropriate security classification for all training products, to include courses, TSPs, and lesson plans, IAW AR 380-5, Department of the Army Information Security Program. Products that are ---

(1) **Classified** are considered **CMI** and require an appropriate restriction statement.

(2) **Unclassified** are considered **CUI** and require an appropriate restriction statement unless determined and marked as "Public Domain." See Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials, for policy and guidance.

Important Reminders
TSPs can be used to provide --- • Training on one **or** more than one task. • One **or** more than one lesson plan for resident training. • All training materials for implementing a complete course at a remote site. • Awareness training material that can be in one or more media, e.g., videotape, handout, etc.
The lesson plan format applies to all resident and exported training.
Do not modify the TSP or Lesson Plan formats without permission from HQ TRADOC, ATTN: ATTG-CD, Fort Monroe, VA 23651-5000. Permission will not be granted without compelling justification. ***Note:*** Structured writing is the preferred format for all course materials.

Appendix Index

b. This appendix covers the following:

Content	Page Number
Lesson Plan Format	E-2
Common/Shared Task TSP Introduction Format	E- 7
Training/TATS Course TSP Format/Components	E- 8
Course Management Plan (CMP) Format	E-10
Optional Formats	E-12

- **Do not revise existing Lesson Plans, Common/Shared Task TSPs, Training/TATS Course TSPs or CMPs just to meet new format requirements. Training proponents will implement these formats using the HQ TRADOC TD automation system (currently ASAT) when these products undergo normal revision to correct content or are revised to incorporate new training strategies.**

- **Develop the products in this appendix using the HQ TRADOC TD automation system (currently Automated Systems Approach to Training (ASAT) as the automation tools meet the functional requirements herein.**

E-1. Lesson Plan Format

[LESSON NUMBER: TITLE]

SECTION I. ADMINISTRATIVE DATA

[Effective Date]

SECTION I. ADMINISTRATIVE DATA

All Courses Including This Lesson

COURSE NUMBER(S) _____

COURSE TITLE(S) _____

Task(s) Taught or Supported

TASK NUMBER _____

TASK TITLE _____

CONDITION:

(OPTIONAL)_____

STANDARD:

(OPTIONAL)_____

Task(s) Reinforced

TASK NUMBER _____

TASK TITLE _____

Academic Hours

The academic hour(s) required to teach this **lesson** is (are) as follows:

	PEACETIME				**MOB**
	AC	**TASS Training Bns**		**AC/RC**	Hrs: Min/MOI
	Resident Hrs: Min/MOI	AT/ADT Hrs: Min/MOI	IDT Hrs: Min/MOI	Non-res DL Hrs: Min/MOI	
TEST	**[If included in this lesson plan.]**				
TOTAL HOURS					
Example	**1:40/CO 1:15/PE**	**1:40/CO**	**1:15/PE**	**2:00/DM**	**1:40/CO 1:15/PE 2:00/DM**

[***Note 1:*** Time reflects summation of lesson academic time by MOI.]

[***Note 2:*** Time must be shown in Hours:Minutes.]

[***Note 3:*** 1 academic hour = 50 minutes and does **not** include "break" time. 1:40 represents a 50-minute academic hour and an additional 40 minutes.]

Test Lesson Number

[If the test is not included in this lesson, list the test lesson number in which this lesson's terminal learning objective is tested and the test results are reviewed with the students. Put "N/A" if not tested in a separate lesson.]

Hours	Lesson No.
Testing, (to include test review)	_____ _____

Prerequisite Lesson(s)

[State if there are none.]

LESSON NUMBER	LESSON TITLE
_____	_____
_____	_____

Security Clearance/ Access

Foreign Disclosure Restrictions

[Apply appropriate FD restriction statement (including number) per Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials.]

References

Number	Title	Date	Additional Information

Student Study Assignments

[State if there are none.]

Instructor Requirements

[These are special qualifications or additional requirements.]

Additional Support Personnel Requirements

[State if there are none.]

Equipment Required

[List equipment required for this lesson. State if there is none.]

Materials Required

INSTRUCTOR MATERIALS: [State if there are none.]

STUDENT MATERIALS: [State if there are none.]

Classroom, Training Area, and Range Requirements [List requirements for training.]

Ammunition Requirements [State if there are none.]

Instructional Guidance Before presenting this lesson, instructors must thoroughly prepare by studying this lesson and identified reference material.
[Include additional guidance as required.]

	NAME	Rank	Position	Date
Branch Safety Mgr Approval				

[**If not required**, put *N/A*. See Chapter I-2 for requirements. **If required and there is no Branch Safety Mgr**, obtain signature of functional equivalent.]

	NAME	Rank	Position	Date
Proponent Lesson Plan Approvals				

[Plan approval signifies development of the lesson plan IAW policy requirements, application of appropriate high and medium risk management codes, and Safety Manager approval as appropriate.]

SECTION II. INTRODUCTION

Method of instruction: [for introduction only]
Instructor to student ratio is __:__
Time of instruction (minutes): _____
Media: _____[State if there is none.]_____

Motivator

Terminal Learning Objective

Note: Inform the students of the following terminal learning objective requirements.

At the completion of this lesson you (the student) will:

ACTION:	
CONDITION:	
STANDARD:	

Safety Requirements [State if there are none. See Chapter I-2, Safety and Environment.]

Risk Assessment Level [See Chapter I-2, Safety and Environment.]

Environmental Considerations It is the responsibility of all soldiers and DA civilians to protect the environment from damage.

[State if there are no environmental considerations. See Chapter I-2, Safety and Environment.]

Evaluation

Instructional Lead-in

Each lesson must have one, and only one, TLO. It is shown in the introduction portion of the lesson plan. ELOs are optional.

SECTION III. PRESENTATION

[Presentation Option1: *Without* Enabling Learning Objectives]

1. **Learning Step/Activity 1 -**

Note: The learning step/activity is a one-sentence statement describing the training activity, preferably in student action terms. See Chapter VI-6, Training Course Design.

Method of instruction: _____ Instructor to student ratio is __:__

Time of instruction (minutes): _____

Media: _____[State if there is none.]_____

References: _____[Title, Number, Para No., Pg. No., etc.]_____

Security Classification: _____

a.

(1)

(2)

b. (Continued)

Note: Conduct a check on learning and summarize the learning activity.

2.

Note: Include as many learning steps/activities as necessary to train the soldier to perform the TLO to the established standard. Provide the same information as for Learning Step/Activity 1.

[Presentation Option 2: *With* Enabling Learning Objectives (ELOs) to support the lesson TLO]

Note: Inform the students of the Enabling Learning Objective requirements.

ELO A.

ACTION:	
CONDITION:	
STANDARD:	

1. Learning Step/Activity 1 -

Note: Include learning steps/activities as shown in Option 1 as necessary to train the soldier to perform the ELO to the established standard. For each learning step/activity, include MOI, instructor-to-student ratio, etc.

ELO B.

Note: Include as many ELOs as necessary to support training of the TLO.

SECTION IV. SUMMARY

Method of instruction: ___[for summary only]___

Instructor to student ratio is __:__

Time of instruction (minutes): _____

Media: [State if there is none.]_____

Check on Learning

Determine if students have learned the material presented by ---

a. Soliciting student questions and explanations.

b. Asking questions and getting answers from the students.

c. Providing immediate feedback in context to the material presented and correcting student misunderstandings.

Review/ Summarize Lesson

Transition To Next Lesson

[if applicable.]

SECTION V. STUDENT EVALUATION

[See Chapter VI-7, Student Performance Measurement/Testing.]

Testing Requirements

Describe how the student must demonstrate accomplishment of the TLO.

Note: Refer student to the Student Evaluation Plan.

Feedback	a. Schedule and provide feedback in context to the material presented; correct student misunderstandings.
Requirement	b. Provide remedial training as needed.

PRACTICAL EXERCISE SHEET NO.

Title	
Introduction	
Motivator	
TLO, ELO, or Learning Step/Activity	[If PE sheet is used by student: **list** the TLO, ELO, or learning step the PE covers. If instructor-led: **inform** the students of the TLO, ELO, or learning step the PE covers.]
Safety Requirements	[State if there are none.]
Risk Assessment Level	

Environmental Considerations	[State if there are none.]
Evaluation	
Instructional Lead-in	
Resource Requirements	
Special Instructions	
Procedures	**1.** **2.**

Feedback Requirements	

C-2

Note: **This is a Sample PE Sheet**

- **PEs may be used to execute training of TLOs, ELOs, or Learning Steps/Learning Activities.**
- **This sheet can be written for use by the instructor or student during practical exercises to ensure pertinent information / processes are followed.**
- **Identify PE Sheet by lesson number that the material supports.**

E-2. Common/Shared Task TSP Introduction Format

This TSP contains all guidance and materials needed to train the specified common or shared task(s).

COMMON / SHARED TASK
TRAINING SUPPORT PACKAGE (TSP)

Note: This is the TSP title page.

TSP Number/ Title	
Effective Date	[Identify the effective fielding date for this TSP.]
Supersedes TSP(s)/ Lesson(s)	[List Number, Title, Date of TSP(s) or lesson(s) that the TSP supersedes.]
TSP User	[Identify the user(s) of this TSP, e.g., SMA.]
Proponent	[Identify task proponent, point of contact, and address for this TSP.]
Improvement Comments	[Elicit comments concerning improvement of enclosed training materials directly to applicable agency(ies), i.e., the proponent and/or preparing agency, if other than proponent.] Users are invited to send comments and suggested improvements on DA Form 2028, *Recommended Changes to Publications and Blank Forms*. Completed forms, or equivalent response, will be mailed or attached to electronic e-mail and transmitted to: Commandant/Commander [Proponent school and/or preparing agency name] ATTN: [name] Installation, State, ZIP Code

POC phone number and e-mail address

[***Note:*** Digital library users are also provided opportunity to create and transmit electronic notes/lessons learned information as TSP/lesson materials are reviewed and prepared for instruction.]

Security Clearance/ Access

Foreign Disclosure Restrictions See enclosed lesson(s) for applicable FD restriction statements per Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials.

PREFACE

Purpose This training support package provides the instructor with a standardized lesson plan for presenting instruction for ---

[List all tasks included in the TSP.]

TASK NUMBER	TASK TITLE

Technique of Delivery [Include both the "Instructional Strategy" and "Media" to be used for each lesson included in this TSP. See Appendix H of this regulation.]

LESSON NUMBER	INSTRUCTIONAL STRATEGY	MEDIA

This TSP contains

TABLE OF CONTENTS		
		Page
Preface		
Lesson Plan 1	Section I, Administrative Data	1-1
	Section II, Introduction	1-2
	- Terminal Learning Objective	
	Section III, Presentation ELO (if used)	1-3
	Section IV, Summary	1-4
	Section V, Student Evaluation	1-4
Lesson Plan 2, 3, etc.	[If TSP contains more than one lesson plan, provide the same information as for the first lesson plan.]	2-1, etc.
Test Lesson Plan	[Tests may be a separate lesson or part of a lesson. If a separate test, provide a lesson plan for presenting the test.]	n-1
Appendices (Identify contents of Appendices A-n by number of the lesson that the material supports).	A. Instructional Media, e.g., Viewgraph Masters	A-1
	B. Test and Test Solutions	B-1
	C. Practical Exercises and Solutions	C-1
	D. Student Handouts	D-1
	E. Course Map [Provide course map covering all lessons if more than one lesson is included in the TSP].	E-1

[***Note:*** List appendices A-E. In the "page" column, put "N/A" if appendix is not included. Add additional appendices as required.]

E-3. Training/TATS Course TSP Format/Components

This TSP contains all guidance and materials needed to train all critical tasks of a particular course to the Total Army. A TATS Course must reflect Active and Reserve Component differences in training requirements, e.g., different tracks for equipment differences.

TRAINING/TATS COURSE
TRAINING SUPPORT PACKAGE (TSP)

Note: This is the course TSP title page.

Course Number / Title

Introduction This course is designed to .....

Effective Date [Identify the effective implementation date for this course TSP.]

Supersedes [List Number, Title, Date]

Course(s)	
TSP User	[Identify the user(s) of this course TSP, e.g., BNCOC.]
Proponent	[Identify the training proponent, point of contact, and address for this course TSP.]
Security Clearance/ Access	b. [Fully describe/list the security clearance and access required for the course.]
Foreign Disclosure Restrictions	See enclosed lesson(s) for applicable FD restriction statements per Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials.
Improvement Comments	Send comments and recommendations concerning improvement of the enclosed training materials directly to applicable agency(cies), i.e., the proponent and/or preparing agency, if other than proponent. Give the complete address, including attention line, internet and US mail addresses. Please send your comments to: Commandant/Commander [Proponent school and/or preparing agency name] ATTN: [if known] Post, State, ZIP code
Safety/Risk Management	The following special safety/risk hazards, notes, cautions, etc. apply to the presentation of this course. Safety and risk management actions are also identified in the training materials at the appropriate point in the materials.
Environmental Protection	The following special environmental considerations, notes, cautions, etc. apply to the presentation of this course as a whole. Specific environmental considerations and protection actions are included in the training material at the appropriate position. (1) (2)
Special Student Prerequisites	In addition to the prerequisites listed in the Program of Instruction, the students must meet these special prerequisites. (1) (2)
This TSP Contains	The course TSP must contain all of the materials and information required to implement the course, including lesson plans (for stand-up instruction or instructor-led interactive multimedia instruction [IMI]) and/or student self-paced lessons, as appropriate. Components may include all or some of the following listed items. Mandatory components are marked with an asterisk. The TSP may also include additional items depending on the specific requirements of the course.

TABLE OF CONTENTS

Standard 10 Reference Excerpts

		Page
* Course Management Plan (CMP) [Mandatory if trained at a school other than the proponent.]		CMP-1
Student Orientation Material [The information required by the student to satisfactorily complete the training. Components include –] * = Student Evaluation Plan = Procedure Guidance = Point of Contact		
* Instructional Materials		
EXAMPLE: Module A [Distance learning courseware, common core, etc.] [***Note:*** If instructor-led IMI, include lesson plan.] Module B [Lesson plans and all supporting materials, including tests.]		
	Lesson Plan 1 POI File Number (PFN)	1-1
	Lesson Plan 2, 3, etc. PFNs	2-1, etc.
	Test Lesson Plan PFN [See Chapters VI-6 and 7]	n-1
Module C [Student IMI self-paced lesson(s).]		
Note: A module may consist of one or more lessons.		

Appendixes	* A. Program of Instruction	A-1
	B. Training Facilities Requirements [Provide a **SUMMARY** of the facilities (buildings, training areas, large training devices) required to present this instruction. Do not duplicate POI material.]	B-1
	C. Student Handouts [For example, Student Guide, Practical Exercise Sheets, Course/Training Critique Sheets, reference extracts, information sheets, Assignment Sheets, Student Equipment/ Material List.]	C-1
	D. Instructional Media [For example, electronic viewgraphs, videotapes, graphics, audio tapes.]	D-1

	F. Course Management Materials: = Student management document forms. = Master student progress control chart. = Student progress chart. = Instructor course evaluation feedback form.	F-1

E-4. Course Management Plan (CMP) Format

The course management plan provides the course managers and the instructors the information required to conduct the training prescribed by the enclosed training materials. It also provides information students need to meet their responsibilities for learning and successful completion of the course. It is required for exported resident training courses, phases, or modules, including TATS Courses and existing RC3 courses. The CMP should reflect any differences for AC and RC instructor and/or student implementation guidance.

Course Management Plan (CMP)
for the [course number, name] [date]

This CMP Contains

TABLE OF CONTENTS	
	Page
* Course Structure	CMP-1
* Course Map (Mandatory Training Sequence)	CMP-2
* Training Sequence	CMP-3
Course Manager Qualifications	CMP-4
Course Manager Guidance	CMP-4
Instructor Certification Requirements	CMP-5
Instructor / Facilitator Guidance	etc.
Student Guidance	
* Test Administration Guidance	
Required References	
Trainer Guidance	

* Mandatory components are marked with an asterisk.

Course Structure

This course is structured in phases, modules, and lessons.
[Include graphic display of course structure and supporting narrative. See sample course structure in Chapter VI-6, Training Course Design.]

(1) Graphic display:

(2) Narrative Description:

Course Map

This course map shows the mandatory training sequence for this course. Each lesson that is shown as a prerequisite for another lesson must be taught before that follow-on

lesson is presented. This mandatory training sequence cannot be violated. Failure to follow it means students will receive training for which they have not received the required prerequisite training.

[Place lesson course map as shown in TRADOC Reg 350-70, Chapter VI-6, here. There may be a course map for phase sequencing and module sequencing in addition to the required lesson course map.]

Training Schedules

Some possible training schedules follow.

[Provide some possible training schedules based on the course map mandatory training sequence. See Chapter VI-6, Training Course Design.]

Course Manager Qualifications

Course managers must have the following qualifications:

Course Manager Guidance

The course manager is responsible for ensuring the training is presented as designed. Specifically, course manager(s) must: ---

(1) Ensure required training resources are available for presenting the training as scheduled (or available when required by the student taking distance learning).

(2) Ensure instructors receive support, materials, and equipment required for presenting this training.

(3) Ensure staff and faculty are trained to present and manage this training.

(4) Continuously evaluate course effectiveness and efficiency and provide appropriate feedback to the training/training development (task) proponent.

(5) Ensure staff, faculty, and students comply with safety and environmental protection rules, regulations, laws, and course requirements.

(6) Ensure facilities, material, equipment, and systems required for presenting this instruction are properly maintained.

(7) Obtain required reference materials.

(8-n) [Include distance learning management guidance as required. Add others as needed, e.g., Schedule the TNET system.]

Instructor Certification Requirements

Instructors presenting this training must meet the following certification requirements:

(1)

(2)

Special instructor qualifications are: [if applicable]
[***Note:*** See Chapter VIII-4, Evaluating Instructor Performance]

Instructor/ Facilitator Guidance

Instructors are directly in contact with the students and represent the command in the presentation of the instruction. They serve as the role model for the students. They must be technically competent and professional in demeanor.

Each instructor/facilitator must ---

(1) Thoroughly study and be well versed in the material prior to presenting the lessons.

(2) Manage the training and maintain an environment conducive to student learning.

(3) Supervise and guide the learning process.

(4) Provide immediate feedback on student performance.

(5) Be alert to students having difficulty and intercede as appropriate.

(6) Hand out the Student Evaluation Plan and Student Guide to the students before the training starts.

(7) Ensure students comply with safety and environmental protection rules, regulations, laws, and course requirements.

(8) Explain the graduation criteria and requirements to the students prior to start of training.

(9) Maintain the following records [List those appropriate for this course]:
(a)
(b)

(10) Counsel students.

(11) Provide appropriate remedial training.

(12) Continuously evaluate course effectiveness and efficiency and provide appropriate feedback to the training/training development (task) proponent.

(13) Ensure the TNET system is up and functional for VTT. (as appropriate)

Student Guidance

It is the responsibility of the student to learn to perform the lesson learning objectives of this training. This includes completing the home assignments, completing practical exercises, and participating in training activities.

(1) The student is to be provided the Student Evaluation Plan and Student Guide before instruction starts. The use/importance of these items and student responsibilities must be thoroughly explained to the student(s).

(2) Students need to provide constructive criticism concerning the efficiency and effectiveness of the training and training materials.

Test Administration Guidance

Administer the test(s) IAW the guidance in the enclosed training material. Special guidance and instructions (if any) follow:

Required References

[List, as required, all references required to teach this course.]

= Military references

Number	Title	Date

= Civilian references

Title, author, date, publisher, Library of Congress number

Note: Verify currency of references via internet:
http://www.usapa.army.mil/gils/browsable.html

Trainer Guidance

[Provide detailed guidance for trainer in the unit if part of this course is conducted in a unit.]

E-5. Optional Formats

[These **examples are optional** and are provided to give ideas for providing needed information.]

MASTER TRAINING AIDS LIST

Standard 10 Reference Excerpts

IDENTIFICATION NUMBER	TITLE	QUANTITY

MASTER REFERENCE LIST

REFERENCE NUMBER	REFERENCE TITLE	DATE

LESSON REFERENCE LIST

LESSON NO.	REFERENCE NO.	REFERENCE TITLE	PARAGRAPHS

STUDENT EQUIPMENT/MATERIAL LIST

NOMENCLATURE	QUANTITY

STUDENT PROGRESS CONTROL CHART

STUDENT:					
TEST NUMBER	GO	NO GO	RETEST GO	DATE	REMARKS

MASTER STUDENT PROGRESS CONTROL CHART

STUDENT NAME	LESSON/TEST NUMBERS													

TR 350-10, para 2-9(f).

2-9. Academic test and retest. Criterion-referenced tests, tailored to measure performance abilities, will be used to measure student proficiency per TRADOC Reg 350-70. IAW TRADOC memorandum, ATTG-CD, 6 Oct 01, subject: Student Academic Measurement/Testing PolicyGuidance course proponents will establish the minimum standard (academic score percentage), for written and performance tests, used to determine successful completion of a block of instruction and/or a course. Course proponents must spell out these standards in a written evaluation plan to be issued to each student upon enrollment. Proponents must also include these standards in course management plans and implementing instructions, if course is taught at more than one training location/site. Commandants must test, retest, pass, fail, dismiss, and honor students IAW the policy and procedures in this regulation and the student evaluation plan.

a. After remedial training, commandants may retest one time those students who fail to achieve established minimum written or performance standards on an objective.

b. Retest scores will be annotated in student course records along with counseling and remediation documentation. However, students who require and pass a retest will receive the minimum passing score for that event and will automatically be removed from class honors consideration (except in the case of IMI self-paced instruction). Commandants will dismiss soldiers from the course who fail to meet minimum passing standards or academic score on any performance or written retest.

c. Certain exceptional circumstances may arise during training that might require a second retest (such as the sudden illness or emergency removal of the student during the retest administration, or during the NCOES student's appeal process a disinterested sergeant major determines that another retest is warranted). Based upon a determination and documentation by the commandant that these exceptional circumstances exist, the student is deemed to not have completed the retest and will be retested again. This option must be listed within the student evaluation plan for a course.

d. Commandants will dismiss students from the course who fail to meet performance standards for a graduation requirement, and/or require extraordinary assistance to remain in the course.

e. School commanders and commandants will follow the dismissal and student appeal procedures found in ARs 135-175, 350-1, and 600-8-24.

f. Every effort will be taken to insure that course testing instrument integrity/security is maintained. As a minimum, schools will maintain test materials in a secure location that is inaccessible to students with test instruments and answer keys kept in separate vault/file containers. Test material security procedures will be included in each

school's/NCOA's testing standing operating procedures and other applicable test control publications. Each school's/NCOA's appointed test control officer will maintain records of test instrument destruction.

AR 611-5, Army Personnel Selection & Classification Testing.

Headquarters
Department of the Army
Washington, DC
10 June 2002

SUMMARY of CHANGE
AR 611–5
Army Personnel Selection and Classification Testing
AR 611-5, dated 10 June 2002, is changed as follows:
o On page i, the history, applicability, proponent and exception authority, Army management control process, supplementation, and distribution paragraphs have been changed. (A distribution restriction was removed by the proponent on 1 August 2000.) The interim changes paragraph has been rescinded.
o Paragraphs 1-5d(8), 1-6a, and 3-5c are changed to include the Web site reference for Army personnel test lists.
o Paragraph 1-5d is superseded.
o Paragraphs 2-1a(3) and 2-1a(4) are superseded.
o Paragraph 2-2a(2)(a) is superseded (changing DA Form 5159-R to DA Form 5159 and removing figure 2-1).
o Paragraph 2-2b(1) and 2-2b(6) references to DA Form 5159-R are changed to DA Form 5159.
o Paragraph 2-3d introductory text is superseded.
o Paragraph 2-5d is superseded.
o Paragraphs 3-3b(10) and 3-3b(11) are superseded (changing DA Form 5160-R to DA Form 5160 and removing figure 3-1).
o Paragraph 3-8 is superseded.
o Paragraph 3-9f is superseded.
o Paragraph 5-1 is superseded.
o Throughout the regulation, references to USASSC-NCR, DCSPER, and Army Research Institute have been updated.
o DA Pamphlet 611-16 has been rescinded. In appendix A and throughout the regulation, rescinded publications have been removed and superseded publications have been replaced.

Effective 10 July 2002
History . This publication is a partial revision. The summary of change lists the

parts that have been changed.
Summary . This revision provides updated addresses for forwarding inquiries and requests dealing with Army personnel testing; establishes more specific procedures for test administration, particularly with regard to the use of proctors.
Applicability. This regulation applies to the Active Army; the Army National Guard of the United States, including periods when administered as members of the Army National Guard; the U.S. Army Reserve; the U.S. Military Academy; and the Reserve Officers' Training Corps. It applies only to Army personnel tests list edatwww. aces. army. mil/apt. Components are identified by proper titles and numbers. During mobilization, policies and procedures contained in this regulation may be modified by the proponent.
Proponent and exception authority. The proponent of this regulation is the Deputy Chief of Staff, G–1. The proponent has the authority to approve exceptions to this regulation that are consistent with controlling law and regulation. The proponent may delegate this approval authority, in writing, to an individual within the proponent agency in the grade of colonel or the civilian equivalent.
Army management control process. This regulation does not contain management control provisions.
Supplementation. Local supplementation of this regulation is prohibited without prior approval of the Deputy Chief of Staff, G–1. Requests for exception, with justification, will be sent through command channels to the Education Division (TAPC–PDE/APT), PERSCOM, 200 Stovall Street, STE 3N17, Alexandria, VA 22332–0472.
Suggested Improvements. Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and

Blank Forms) directly to the Education Division (TAPC–PDE/APT), PERSCOM, 200 Stovall Street, STE3N17, Alexandria, VA 22332–0472.

Distribution. Distribution of this public action is available in electronic media only and is intended for command levels A, B, C, D, and E for Active Army, Army National Guard of the United States, and U.S. Army Reserve.

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*This regulation supersedes Army Regulation 611–5, dated 15 November 1982, and rescinds Department of the Army Pamphlet 611–16, dated 1 April 1985.

UNCLASSIFIED

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ii AR 611–5 • 10 June 2002

Chapter 1
Introduction
1–1. Purpose
This regulation prescribes policies, responsibilities, and procedures for the procurement, administration, safeguarding, scoring, and release of Army personnel tests.

1–2. References
Required and related publications are listed in appendix A.

1–3. Explanation of abbreviations
Abbreviations in this regulation are explained in the glossary.

1–4. Scope and uses of Army personnel tests
a. Scope. When the term “personnel test” is used, it includes the following
(1) The test booklet and magnetic tapes containing questions.
(2) All ancillary materials (answer sheets, scoring keys, conversions tables, manuals for administration and scoring, and automated systems for administration, scoring, and recording of results).
(3) Board interview procedures and scoring forms.

b. Uses. Army personnel test are used to accomplish the following:
(1) Select applicants for entry into the Active Army, Army National Guard (ARNG), or U.S. Army Reserve (USAR).
(2) Select applicants for appointment as commissioned or warrant officers.
(3) Initial or subsequent classification of enlisted personnel.
(4) Select officers, cadets, and enlisted personnel for assignment to training or duties that need specialized aptitudes or qualifications.

1–5. Responsibilities
a. The Deputy Chief of Staff, G–1 (DCS, G–1) will—
(1) Establish policies on the use of Army personnel tests for personnel selection and classification and personnel program goals.

(2) Provide guidance on priorities for the development of new or revised Army personnel tests and related instruments.

(3) Establish policy for the release of Army Personnel test materials. This does not apply to foreign language aptitude and proficiency tests.

(4) Designate a point of contact in the Office of the DCS, G–1 for testing matters.

b. The Commander, US Army Research Institute (ARI) will—

(1) Perform professional psychological research to provide the Army with tests and related instruments needed for effective personnel management.

(2) Provide advice and guidance for operational use of research findings.

c. The Commandant, Defense Language Institute Foreign language Center (DLIFLC) will—

(1) Develop foreign language tests and related instruments required for effective personnel management of the Defense Foreign Language Program (DFLP). (See AR 350–20.)

(2) Establish standards for administering, scoring, evaluating, and recording results of foreign language aptitude and proficiency tests for the DFLP.

(3) Establish policy on the review of request for, and making final determination of release of foreign language aptitude and proficiency tests to other US, State, and local government agencies. Also included are requests by private organizations, individuals, and foreign governments.

d. Commander, U.S. Total Army Personnel Command (PERSCOM) will—

(1) Manage, monitor, and evaluate the administration of Army personnel tests.

(2) Manage personnel test materials; determine initial printing levels, distribution, and reprint status; determine funding requirements for initial printing; and arrange for centralized scoring when required.

(3) Develop procedures to safeguard Army personnel tests.

(4) Develop systems and procedures for collecting and processing operational test score data.

(5) Prepare or provide technical advice and assistance in preparation of directives that prescribe the use of Army personnel tests.

(6) Grant permission to retest except for retesting of applicants for enlistment as governed by AR 601–210.

(7) In accordance with established policy, release Army personnel test materials, other than foreign language aptitude and proficiency tests and information.

(8) Serve as a point of contact between HQDA and Army field elements for all matters concerning Army personnel tests listed at www.aces.army.mil/apt.

e. The Personnel test Program proponent will—

(1) Initiate actions required to insure validity of existing tests.

(2) Develop personnel management systems and procedures for the operation of the specific personnel selection and classification program.

(3) Establish policy on testing, waiver procedures, and qualifying score.

f. Commanders will—

(1) Provide proper command supervision of Army personnel testing operations.

(2) Provide enough personnel and facilities for administration of Army personnel tests.

(3) Appoint test control officers (TCO) and alternate TCO, as required, for prompt compliance with personnel programs and responsiveness to testing requirements.

(4) Ensure that Army personnel tests are effectively safeguarded from loss and compromise; take corrective action when loss or compromise is indicated.

(5) Insure that Army personnel test results are correctly calculated, entered in personnel records, and used as prescribed in the applicable regulations.

1–6. Methods of prescribing use of Army personnel tests

a. The use of Army personnel tests is as prescribed in the Army regulation that governs the specific personnel program for which the test is to be used. See www.aces.army.mil/apt for a listing of the regulations prescribing the use of each Army personnel test. The following information covering the use of Army personnel tests will be found in these regulations:

(1) Designation of activity or organization responsible for administering and scoring the prescribed tests, and for reporting or processing these results and related information.

(2) A description of qualification required of examines to be eligible to take designated tests.

(3) Instructions for recording test scores on personnel records and reports.

(4) Policies governing retesting.

b. DA circulars are issued to announce the availability of new test materials; announce changes in the use of existing Army personnel tests; and provide guidance for the administration of new or revised tests in support of specific programs.

Chapter 2
Test Control and Records
2–1. Test control officers

a. Appointment. TCOs and alternate TCOs will be appointed or relieved in writing.

(1) The appointment of a TCO will be made in accordance with procedure 7–10, DA Pam 600–8. See figure 7–10–3 for the prescribed format.

(2) Relief of a TCO will be in accordance with paragraph 5, “Special Instructions.”

(3) See paragraph 1 of figure 7–10–3, DA Pam 600–8, for the appointment of a new TCO and the relief of the old TCO (By term of vice). This procedure will reduce the workload of military personnel officers.

(4) Contact the Chief, National Guard Bureau (NGB–ARP–CS) for guidance regarding the use of NGR 310–10, appendix B, for appointment and relief of ARNG TCOs.

(5) One copy of the written appointment or relief of the TCO will be forwarded to Education Division (TAPC–PDE/APT), PERSCOM, 200 Stovall Street, STE 3N17, Alexandria, VA 22332–0472.

b. Locations served by TCOs.

(1) A TCO will serve at each organization, activity or State Adjutant General (AG) Office where Army personnel tests are requisitioned, handled, stored, administered, and scored.

(2) A State AG may appoint more than one TCO if warranted by geographic or strength factors. The number of TCOs must be kept to the absolute minimum in a command, installation, or State (in the case of the ARNG) to perform the required duties properly.

(3) One or more alternate TCOs may be appointed where small units are scattered, isolated, or geographically split; where a heavy testing schedule exists; or under other circumstances where testing operations would be facilitated.

(4) An alternate TCO will be appointed for each State ARNG to function in the absence of the TCO.

c. Consolidation of TCO functions. The TCO designated under the provisions of AR 135–205 or AR 621–5 or the Personnel Survey Control Officer (PSCO), designated under the provisions of AR 600–46, may also be appointed as TCO. Consolidation of TCO functions should be accomplished when possible. This should be done so that the experience gained in test administration and scoring may be used to the maximum advantage; also, procedures and facilities for safeguarding test material may be made more effective.

d. Criteria for TCOs. The TCO or alternate TCO will normally be a commissioned officer, warrant officer, or enlisted person in grade E–7, E–8, or E–9. A DA civilian employee or any ARNG Technician or Active Guard Reserve (ARG) personnel (GS–5 or pay grade E–5 or higher) may be appointed as TCO or alternate TCO under the following conditions:

(1) When testing under this regulation is consolidated with testing at US Army Education Centers (normally supervised by a civilian education adviser).

(2) When there are no available commissioned or warrant officers or senior enlisted personnel.

e. Responsibility of TCOs. The TCO or alternate TCO will–

(1) Advise the installation, organization, or activity commander or State AG on the administration of personnel testing programs under the jurisdiction of the command.

(2) Maintain a testing facility standing operating procedure (SOP). This SOP will include the following:

(a) A records system for administrative operations of the testing facility.

(b) Procedures for requisitioning, handling, storing, scheduling, administration, and scoring of tests.

(c) Disposition of test materials.

(d) Procedures for transmitting test results to the proper office, board, or agency.

(e) Procedures governing security of test materials in accordance with this regulation.

(3) Designate, in writing, personnel who are authorized access to, and who handle test materials.

(4) Insure that all personnel in the testing facility are thoroughly indoctrinated regarding test security.

(5) Insure that the testing facility SOP is reviewed by all personnel on their assignment to the testing facility, and quarterly thereafter.

(6) Monitor all procedures prescribed in the testing facility SOP.

(7) Insure that all test results are reported as soon as possible to personnel tested.

(8) Inspect testing sessions to determine that tests are properly handled and administered. This will insure that test booklets, scoring keys, and completed answer sheets are handled only by authorized personnel.

(9) Insure that test results are forwarded to the military personnel office (MILPO) to be recorded on individual personnel records.

(10) Insure that personnel who administer and score tests are qualified to perform their duties, to include interpretation
of test scores; and have demonstrated that they understand and practice correct procedures for administering and scoring each assigned test.

(11) Provide technical assistance to selection and evaluation boards on the proper use of interview report forms to be completed. When required, score completed interview report forms and compute composite scores on test instruments
used to screen an applicant by the selection and evaluation board.

2–2. Security

a. General provisions.

(1) Test security is a command responsibility.

(2) Security measures will be established by all elements where Army personnel tests are handled, administered, or stored. These measures will include the following as a minimum:

(a) Maintain an inventory of Army personnel test material using DA Form 5159 (Inventory of Army Personnel Test Material).

(b) Store test components in locked rooms or containers where they are not accessible to unauthorized individuals.

(3) Functions required to be performed in the establishment and maintenance of adequate procedures for test security may be delegated to a TCO or an alternate TCO. They must exercise close supervision over all phases of test receipt, storage, protection, issue, administration, scoring, and destruction.

(4) Security requirements established in this regulation meet the requirements for handling FOR OFFICIAL USE ONLY (FOUO) material. These components bear the designation FOR OFFICIAL USE ONLY or CONTROLLED ITEM (TEST MATERIAL). An exception to this will be answer sheets that have not been completed by examinees, worksheets, and Aptitude Area Computing Templates. Test Components used by the Army are to be shown to no one unless it has been determined that such disclosure is essential to the performance of official duties prescribed in appropriate directives and are as necessary for those individuals that administer and score tests. Completed test answer sheets will not be returned to the examinees. The only information that will be

furnished to the examinee is the test score or subtest scores and other administrative information found in the identification portion of the answer sheet.

b. Procedures concerning test security. Specific procedures concerning test security and control that will be complied with are as follows:

(1) The TCO or alternate TCO will make a quarterly inventory of test materials using DA Form 5159. The inventory will include test booklets, administration and scoring manuals, and scoring keys. More frequent inventories may be made at the discretion of the TCO.

(2) If the FOR OFFICIAL USE ONLY designation has not been preprinted on test components, the material will be so marked unless the material is excepted from control requirements as stated in *a* above.

(3) Test booklets, manuals, and scoring keys will be serially numbered for internal security control. The prefix to the serial number will consist of the office symbol of the activity or the next higher headquarters which has an assigned office symbol. Serial numbers will be indelible. Serial number of previously destroyed materials will not be assigned to a newer test materials.

(4) DA Label 87 (FOR OFFICIAL USE ONLY Cover Sheet) need not be attached to Army personnel test material when the material is actually being used for test administration and scoring purposes.

(5) Controlled test material will be double wrapped when shipped or mailed. Such material will be mailed by registered or certified mail as shown below. The inner envelope or package (also addressed) will be stamped with the following notation:
FOR OFFICIAL USE ONLY
TEST MATERIAL TO BE OPENED BY TEST CONTROL OFFICER ONLY

(a) Inner envelopes or packages will not be opened by message center or mailroom personnel, but will be given directly to the TCO upon receipt.

(b) Test booklets, scoring keys, or devices must be sent by registered mail.

(c) Items with test questions will not be mailed in the same package with test answer sheets.

(d) Other accountable test materials can be sent by regular mail.

(e) Nonaccountable test materials can be sent by regular mail.

(6) All test components must be accounted for at all times. When test components, except unused answer sheets, are taken from and returned to the locked cabinets, exact counts of these components will be made. They will be recorded in the “NOTE” section of DA Form 5159.

(7) Test components (except for test answer sheets that have been filled in by test examinees) that have become mutilated or marked, through use, and cannot be made usable by erasing, transparent tape, or restapling will be destroyed. Destruction will be accomplished by burning, melting, or chemical decomposition. Pulping machines or other methods are used to insure destruction so as to stop recognition or reconstruction of protected information. Destruction of such test components will be accomplished by the TCO having custody of or supervision over these test materials. A destruction certificate is required.

(8) Test materials, except for blank answer sheets, will be kept in locked rooms or containers when not in transit or in actual use. Test scoring keys will not be stored in the same drawer as test booklets and blank answer sheets. Only persons whose duties require use of the test materials will have keys and combinations to storage facilities.

(9) Army personnel test material is exempted from automatic time-phased downgrading. Army personnel test material will remain FOR OFFICIAL USE ONLY unless specific interactions are issued by TAPC–PDE.

2–3. Loss, compromise, or possible compromise of test materials

Loss or possible unauthorized disclosure of Army personnel test materials has been determined to have potential Army wide implications. Upon discovery of loss, compromise, or suspected compromise, the following procedures will be strictly followed:

a. The responsible TCO. The responsible TCO will–

(1) Immediately notify the local commander or the center commander in the case of USAR units.

(2) If one or more alternate forms of the test are available and use is authorized by current directives, stop all testing with the form of the test or test battery jeopardized. For example, if form X– is jeopardized, stop testing with form X–1; however, testing may continue with alternate forms such as X–2 or Y–1.

(3) Impound all tests, test batteries, and completed answer sheets of the jeopardized form of the test. The answer sheets completed before the compromise, suspected compromise, or loss occurred will not be impounded. Place test materials in a locked cabinet.

(4) Resume testing with the form of the test or test battery concerned only when directed to do so by the major commander.

(5)) If no other forms are available, continue testing with the jeopardized test or test battery. Monitor all future testing sessions very closely for any evidence of compromise.

b. The local commander. The local commander will—

(1) Immediately notify TAPC–PDE through command channels. The notification will include the following:

(a) Description of the material lost or compromised.
(b) Identity of the releasing party.
(c) The recipient.
(d) All other persons involved.
(e) Circumstances surrounding the loss or compromise.
(f) The recurrence of such an incident.

(2) If the circumstances surrounding loss or compromise of Army personnel test information show that an investigation is warranted under AR 15–6, forward the results of the investigation through command channels to Education Division (TAPC–PDE/APT), PERSCOM, 200 Stovall Street, STE 3N17, Alexandria, VA 22332–0472. U.S. Army military Enlistment Processing Command (MEPCOM) results will be forwarded to Deputy Chief of Staff (DAPC–MPA), 300 Army Pentagon, Washington, DC

20310–0300. The investigation under AR 15–6 will in no way prevent or delay the submission of reports required by (1) above.

c. The commander or State Adjutant General. The commander or State Adjutant General will—

(1) Insure that a thorough investigation of the compromise, possible compromise, or loss has been made; also, that proper actions are initiated to prevent recurrence of loss or compromise of test materials.

(2) Notify TAPC–PDE through command channels of the nature of findings of any additional investigation and actions taken to prevent future compromise or loss.

(3) Direct resumption of retesting with the test or test battery concerned when authorized by TAPC–PDE in conjunction with the proponent of the personnel program in which the test is used.

(4) Take further action if requested by TAPC–PDE.

d. Commander, PERSCOM. The Commander, PERSCOM will–

(1) Review the investigative report and recommendations.

(2) Coordinate with the test proponent, the point of contact (POC) in the Office of the DCS, G–1 and with the Commander, ARI or the Commandant, DLIFLC.

(3) Authorize the major commander or State AG to resume testing or take other appropriate action.

2–4. Records of testing

a. Test score transmittal data. Activities conducting Army personnel tests will prepare correspondence to transmit test scores to custodians of personnel records, selection and evaluation boards, or other agencies authorized to receive test scores. Testing activities will keep copies of this correspondence for 1 year in accordance with AR 25–400–2. Records will contain, as a minimum, the individual's name, social security number, organization, and all parts and composite scores. These records are required to be recorded on personnel qualification records or applications for programs for which the test was administered.

b. Testing operations records. The TCO will maintain records of the items shown below. These records will be maintained in accordance with AR 25–400–2.

(1) Requisitions for test materials.

(2) Test materials received by automatic distribution or requisition.

(3) The number of each personnel test administered, including a separate count for each form of the test.

(4) The reasons for testing. Indicate whether the test is an initial, first retest, second retest, third retest, and so forth.

2–5. Destruction or transfer of test materials

a. Destruction of test materials. TCOs will destroy Army personnel test materials that are withdrawn from operational use upon direction of TAPC–PDE. They will use methods and procedures in paragraph 2–2*b*(7), unless the directive that announces their withdrawal gives specific retention guidance.

b. Transfer of test materials. A TCO may transfer surplus tests to another TCO who needs them. The activity commander must approve and monitor all transfers of FOUO test materials between TCOs. Both TCOs will update the most recent inventory to reflect the transaction. The gaining and the losing TCO will keep a copy of the document transferring test materials for 1 year in accordance with AR 25–400–2.

c. Loan of test material. Activities authorized a TCO may administer their own testing programs. When a need arises, the activities may borrow a common use test from the nearest active duty, National Guard, or Army Reserve TCO. In such cases, the TCOs involved must take proper security precautions in handling test material; they will use the methods and procedures in paragraph 2–2.

d. Disbandment of a TCO activity. When a TCO activity is disbanded or discontinued, the TCO will destroy all personnel test materials in the organization's inventory according to paragraph 2–2*b*(7). Test materials will not be returned to U.S. Army Publishing Agency Distribution Operations Facility or Army Personnel Test Distribution Center, Alexandria, VA.

Chapter 3
Test Administration
3–1. Standard test administration
a. General. Testing procedures and conditions can affect test scores. Poor conditions may decrease test scores significantly below the scores of those tested under favorable circumstances. For this reason, Army tests must be given under standard conditions and procedures that give each person the opportunity to do his or her best. Such test conditions and procedures are outlined in this chapter.

b. Authorized test instructions. Specific directions for test administration and scoring are contained in manuals that accompany each Army personnel test. They must be strictly adhered to. Test examiners and proctors will use only Army personnel test materials in preparation for or during the administration of tests.

3–2. Test administration personnel
a. Test examiner. The persons shown below may be designated by the TCO or alternate TCO to administer Army personnel tests. Such appointments will be in writing. These persons must be physically present during all phases of testing.

(1) Any commissioned or warrant officer or enlisted personnel in grade E–5 or higher.

(2) DA civilian employees, GS–3 or higher.

(3) ARNG technicians or AGR personnel, GS–5/pay grade E–5 or higher. (Maintenance technicians or AGR personnel in organizational maintenance positions are excluded.)

b. Test proctor. Test proctors are military personnel (E–3 or higher) or DA civilian employees (GS–2 or higher). The number of test proctors may vary according to the physical facilities available and the number of examinees taking the test. However, examinees taking a test will not be left unattended under any circumstances. When giving tests to fewer than 25 examinees, the test examiner may serve as the test proctor. When using audio equipment, a proctor should be made available for 10 or more examinees. At least one proctor will be provided for each additional 25 examinees or fraction thereof. Formal written appointment is not required. The test proctor performs duties described in paragraph 3–4c as assigned by the test examiner.

3–3. Favorable test conditions

a. The procedures for administering tests should bring out a person's best performance. Make sure that the person who takes the test is—

(1) Reasonably free from distraction in the surrounding environment.

(2) Aware of the importance of, and reasons for, taking the test.

(3) Comfortable and rested.

b. Testing environment. Ideal testing conditions are very hard to achieve. However, close attention to the following features will provide adequate conditions:

(1) Make sure the testing room is quiet; frequent or loud noises may interfere with the test performance. Never give tests in a location where ordinary business is conducted. Testing facilities located near frequent loud noises should get soundproofing of the testing building and rooms.

(2) Make sure testing instructions are loud and clear to all examinees. When using loudspeakers and microphones, carefully place the speakers.

(3) The examiner's voice must be clearly heard by all persons being tested.

(4) The examiner should be provided with a raised platform or rostrum in a part of the room where he or she can see or be seen by all persons being tested.

(5) Provide adequate, comfortable lighting for the room and working surfaces. Avoid shadows and strong glare on working surface.

(6) If possible, control the ventilation, temperature, and humidity to provide for the examinee's comfort. Do not conduct testing when environmental conditions are so extreme that they interfere with concentration.

(7) The space allotted to each individual must be wide enough to hold both a test booklet and a separate answer sheet. Chairs with writing arms should not be used for testing.

(8) When seating arrangements do not permit adequate separation of examinees, alternate versions of the same test may be used where available and not otherwise restricted by governing directive. The tests will be distributed alternately so that adjacent examinees do not take the same version of the test.

(9) No examinee may give or receive help on the meaning of test questions during the test. The use of partitioned booths or alternate seating will help to prevent collaboration.

(10) Immediately before the instructions are read by the test examiner, all examinees will be given verbal and written information required by the Privacy Act of 1974.

(11) Do not test a person who feels that there are personal conditions that will prevent optimum test performance. Before each person is tested, the test examiner will establish if there are reasons why the person should not be tested. Examples of such reasons are fatigue, illness, emotional distress, family problems, financial problems or other circumstances that could interfere with performance in the test. All examinees will complete and sign the DA Form 5160 (Test Administration Statement) before being tested. If a person shows on this statement that he or she is not physically or mentally able to be tested, testing will be rescheduled. The new test date should be acceptable to the TCO, the unit commander, and the person concerned. The examinee's signed Test Administration Statement will be maintained in accordance with AR 25-400-2.

(12) Testing should not continue for more than 2 hours without a break; nor should it last more than 4 hours in one session. However, a break will not be given when testing with the Armed Service Vocational Aptitude Battery (ASVAB) or the Armed Forces Classification Test (AFCT). When more than one session is needed for the same examinees, separate sessions would be scheduled on separate days, preferably mornings. Evening testing is not conducive to adequate evaluation of the examinee's performance and should be avoided.

3–4. Preparation for testing session

a. General. Examiners will be selected for the quality of their speaking voice and ability to handle groups of people. An examiner's accent should be indigenous to the group being tested. If the examinees being tested are from many parts of the country, the examiner's accent should be easily understood by all. Good testing administration requires—

(1) Careful selection of the testing team.
(2) Thorough preparation.
(3) Following directions exactly.
(4) Accurate timing.
(5) Care of test materials.

b. Examiner's preparation. The examiner will make a careful study of the manual prescribing the procedures for administration of the test. This will help the examiner to know the purpose and use of the test, the materials needed to give the test, the directions to be read, and the problems that may arise. The examiner will study the oral directions until he or she can read them in a normal manner. Examiners and proctors will take each test before trying to give it, unless instructions in specific test manuals or directives prohibit this. Results achieved by individuals tested under these provisions will not be recorded on the individuals personnel qualification records. This procedure will be standard when a new test is installed or new examining people are trained. In this way, the examiner gains an appreciation of the examinee's viewpoint on the test and learns how to anticipate questions that most commonly arise.

c. Duties of proctors. The examiner will instruct the proctors in their duties. When practical, regular testing teams will be appointed to administer tests. Each proctor will be assigned responsibility for a certain section of the room. Before the testing period, the proctors will check the materials to be used to make sure that there are enough.

They will know the order in which these materials are to be distributed and collected. While directions are being read and the test is being taken, the proctors will patrol their assigned areas. They will–

(1) Carry out in sequence all instructions given by the examiner.

(2) At the proper time, see that each examinee has the necessary materials for taking the test.

(3) Insure that examinees are following directions correctly; also that they understand what must be done and how to do it. The proctors should be alert to detect and correct wrong methods of making answers where separate answer sheets are used. They should observe the examinees in their section to be sure that each is working on the proper part of the test during the prescribed time.

(4) See that each examinee is doing his or her own work.

(5) Excuse from the test any person who is or becomes too ill to continue.

3–5. Administration of test

a. Standard directions. The examiner will read the oral directions from the administration manual of the test concerned. The oral directions will include a standard statement on the test to be given, how results will be used, and why it is important for each person to do his or her best. These remarks help to dispel anxiety and release tension, yet stress the necessity for earnest effort. The examiner will tell the examinees what to do by reading aloud the directions in the manual. These directions will be read verbatim. They will not be paraphrased or given from notes or memory; nor will they be adapted to the examiner's idea of what is more appropriate for local conditions. After reading the directions the examinees will be allowed to ask questions.

b. Time limits. Time limits that are stated in the test manual must be strictly observed. When the elapsed-time indicator is not used, the start and stop times for each test or subtest will be conspicuously posted. Examiners will review manuals carefully before giving a test to be sure they know how the time limits are to be applied. Some tests have parts that are separately timed. Examiners must be sure that examinees stop work when the time limit for a part of the test is reached, and do not start to work on the next part of the test until the time for that part begins.

c. Standard test materials. Examinees will use pencil and paper only during the test session. They may not use unauthorized testing aids such as calculators, slide rules, and so forth. Army personnel tests listed at www.aces.-army.mil/apt were standardized on personnel who were required to take these tests using pencil and paper only. The value and accuracy of test scores can be affected by the procedures and conditions of test administration. Score norms are based on the administration of tests under standard conditions. Such standards are established for the benefit of both the examinee and the test administrator. This will insure that there is an equal opportunity for examinees and that proper testing and test control are possible.

3–6. Answering examinees' questions

Routine questions will be answered by the examiner. Such questions concern testing procedures, time limits, purpose, and uses of the test. Administrators and proctors will

avoid revealing information that might influence the proper evaluation of the individual. Explanations or answers to test questions will not be furnished. At no time after the completion of testing will examinees be permitted to have access to their answer sheets.

3–7. Collection and disposition of test materials

a. Collection. After the signal to stop work has been given, the materials will be collected as quickly as possible. All test forms and scratch paper, if provided, must be strictly accounted for. Test booklets must be collected from all examinees. They must be counted and examined to insure that no pages are missing before examinees are dismissed.

b. Dismissal of examinees. Frequently, some of the examinees may finish before the time limit for the test has expired. If these persons are permitted to leave before the end of the test, care will be taken to insure that they do not disturb the other examinees. The test administrator will be sure that they have complied with all directions in the administration manual; also, that all testing materials and scratch paper have been turned in. Test materials will be checked for completeness prior to the dismissal of an examinee from the testing room for any reason.

c. Disposition of mutilated or marked materials. After each testing session, all answers or stray marks of any kind will be erased from test materials that are to be reused. If marks cannot be erased or if the booklet is worn or torn and cannot be repaired, it will be destroyed in accordance with paragraph 2–2*b*(7). All used scratch paper will be destroyed. All tests and testing supplies will be stored according to test security procedures in paragraph 2–2.

d. Retention of scored answer sheets. Unless specific guidance is given in test directives, answer sheets for Army testing programs will be retained for 1 year by the element administering the tests. (See AR 25–400–2.) During the retention period, the answer sheets should be organized by date of testing. This is done to aid identification of answer sheets completed by particular individuals or groups. Answer sheets will be destroyed after 1 year by shredding, mulching, or burning.

3–8. Reporting test results to examinees

The TCO or alternate TCO will report all test results to the person tested. This will be done as soon as possible after the test has been scored. Scores should be explained to the person tested in terms of significance for the various personnel programs concerned. ASVAB or AFCT scores will be recorded on DOD Form 1304.12K (Armed Services Vocational Aptitude Battery, Scoring Worksheet).

3–9. Retesting

a. Policies governing retesting.

(1) Retesting may be permitted when acquired in–service education, job experience, and training are considered to

have changed the person such that the original score no longer is representative of the person's potential qualification for the following:

(a) Advancement.

(b) Specialized training.

(c) Retention in the Service.

(2) Retesting will be done as authorized by the AR that applies to the specific test and personnel selection program.

(3) Retesting may be permitted on any test when the retesting authority determines that extenuating circumstances invalidated test results.

(4) When possible, different versions of the test will be used for each retest. However, this must be authorized by the AR that covers the personnel program for which retesting is being done.

b. Time limits for retesting. Unless specified in the applicable regulation, retests on Army personnel tests will not be given until at least 6 months from the date of the last administration of the test.

c. Approval of retesting for in-service, ARNG, and USAR personnel.

(1) First and second retests may be accomplished on approval of the person's immediate commander.

(2) Requests for third and subsequent retests and for retesting as an exception to policy will be forwarded direct to Education Division (TAPC–PDE/APT), PERSCOM, 200 Stovall Street, STE 3N17, Alexandria, VA 22332–0472.

d. Requests for retesting of in–service, ARNG, and USAR personnel. Such requests will be initiated and signed by the person concerned. Requests will be on DA Form 4187 (Personnel Action) and will contain the following information:

(1) Specific purpose for which retest is desired.

(2) Reasons previously attained scores are not considered valid.

(3) Extent of effort the person has made to improve his or her general ability and effectiveness in the Army since the last test was given.

(4) Date and score attained on each previous test. This may be extracted from the individual's personnel record.

e. Retesting on the ASVAB or AFCT. Retest of Army enlisted personnel on the ASVAB or AFCT under one of the following conditions will consist of all components of the battery or test.

(1) Duty performance by the person reflects a progressively higher level of technical skill, verbal comprehension, or job knowledge.

(2) The persons successfully completes preparatory high school instruction under the Army Continuing Education System (ACES) (AR 621–5).

(3) The person successfully completes the high school level general education development (GED) test.

(4) Persons successfully complete the Basic Skills Education Program (BSEP).

(5) The person applies for Officer Candidate School (OCS), commission or appointment as a warrant officer.

(6) The Active Army member applies for immediate reenlistment in the regular Army (RA) and does not have the required aptitude area scores of 85 or higher.

f. Recording and use of test scores. Scores of authorized Army personnel tests will be recorded on the individual's Personnel Qualification Record. These scores will be used in lieu of previously attained scores for all classification, selection, training, assignment, or retention purposes. Entry on DA Form 2–1 (Personnel Qualification Record–Part II) should be posted in accordance with AR 600-8-104.

g. Retention of requests for retesting. Activities giving Army personnel tests will keep copies of requests for retesting. These requests will be kept in accordance with AR 25–400–2, as applicable.

Chapter 4
Test Scoring
4–1. Authorized scoring instructions
Test scoring instructions normally are in the manual for administering an Army personnel test. For some tests, there are separate manuals of instructions for scoring. Scoring instructions must be followed exactly.

4–2. Meaning of scoring formula
The statement of how the score is obtained is called the "scoring formula" for the test and is stated in the scoring directions. It also appears in abbreviated form on the scoring key. For example:
"R" The score is the number of right answers.
"R–W" The score is the number of right answers
minus the number of wrong answers.
"R–1/3W" The score is the number of right answers
minus one-third the number of wrong answers.

4–3. Computation of composite scores
Many Army personnel tests are part of a test battery for which a composite score, using the scores on the individual tests of the battery, is computed. In some test batteries, the scores of one or more of the individual tests are adjusted, usually by multiplying by a prescribed weight or constant such as 2 or 3. This is done so that the individual's test score may be weighted, as required in the design of the test battery. When test manuals prescribe that a weighted composite score will be computed, directions prescribe entry of test scores in appropriate boxes of answer sheets, for adjustment of test scores to provide proper weighting, and for computation of the composite score. Care must be taken to insure that such computations are correctly made and that proper tables and charts are used. Failure to adjust the score on one or more tests by multiplying by the prescribed weights before adding the scores is a common error in test scoring. This type of error has serious consequences because of the large discrepancies in numerical values associated with such errors. Applicants can be severely penalized through failure of test scorers to compute this type of score correctly. TCOs and other persons

responsible for the accuracy of test scoring will have a second person check all composite scores.

4–4. Type of scoring

a. Scoring procedures. Some tests must be hand-scored; others, when special answer sheets and pencils are used, may be scored either by hand or by optical scanner scoring machines. All machine-scorable tests may also be handscored for quality control. Both hand- and machine-scoring methods make use of scoring formulas. When the formula requires subtraction of a proportion of wrong answers, the necessary arithmetic is performed automatically by the scoring machine. The machine yields the adjusted score directly when controls are properly adjusted. Specific procedures for machine scored tests are found in scoring directions for that test. General operating instructions are provided with the operator's manual for each type of scoring machine. The general methods for hand-scoring all Army personnel tests is found in the appendix B.

b. Machine scoring.

(1) Requisites. Machine–scoring of answer sheets has two advantages over hand-scoring; speed and accuracy. In order to use these advantages, the following four requisites must be met:

(a) Examinees must properly record their answers on the answer sheet.

(b) The scoring machine must be in proper functioning order.

(c) The operator must set up and operate the machine correctly.

(d) Each scoring machine must be used with its specific operating equipment. All scoring machines require specially printed answer sheets. The design of the answer sheets and the alignment of the marking spaces on the answer and control forms must be compatible with the type of machine being used. They must meet the specifications for the proper functioning of the type of scoring machine involved.

(2) Familiarity with scoring instructions. All persons involved in machine-scoring will become thoroughly familiar with the operators manual for the machine used. They must also be familiar with the machine-scoring procedures for the specific test being scored. For aid in scoring procedures not described in the proper test administration and scoring manual, contact Education Division (TAPC–PDE/APT), PERSCOM, 200 Stovall Street, STE 3N17, Alexandria, VA 22332–0472.

(3) Checks on accuracy of machine scores. If there are no quality control instructions in the manual for a specific test, the following procedures will be used:

(a) Five percent of all machine scored test answer sheets will be rescored by hand if the total number of tests of a single type administered exceeds 20.

(b) At least two out of a total number of tests of a single type administered will be rescored by hand if the number is 20 or less.

(c) Samples from machine-scored test batches will be randomly selected from the top third, middle third, and lower third of each batch of test answer sheets.

Chapter 5

Procurement and Release of Army Personnel Test Materials

5–1. Procurement

a. By test control officers.

(1) The PERSCOM APT Program Manager (TAPC–PDE) will announce the availability of newly developed Army personnel test materials by a DA message. All activities will requisition the new materials.

(2) Requisitions will be sent to one of two distribution centers depending on the type of test material requisitioned. For ASVAB and AFCT material, requisitions will be made to the U.S. Army Publishing Distribution and Operations Facility through the U.S. Army Publications Agency Web site, http://www.usapa.army.mil/pubs. Requisitions for all other APT material will be sent to the Education Division (TAPC–PDE/APT Dist. Ctr.), PERSCOM, 2461 Eisenhower Avenue, Suite 803, Alexandria, VA 22331–0472, e-mail: aptdistro@hoffman.army.mil, or FAX: DSN 221–9069, commercial (703) 325–9069.

(3) The distribution centers will provide test materials to designated TCOs of specific elements of the Active Army or Reserve Components. These elements are authorized or directed by Army regulations to use Army personnel test c o m p o n e n t s. The written appointment of the TCO must be on file with PERSCOM APT Program Manager (TAPC–PDE). It is mandatory that TCOs requisition only the amount of test materials that are actually needed to carry out their testing mission. This is due to paper shortages, increased printing costs, and constraints in the printing budget. TCOs will submit requisitions for test materials to the addresses shown in (2) above.

b. Special use of Army personnel tests other than foreign language aptitude and proficiency tests. When test materials are desired for a purpose not specifically authorized in a directive, the requisition for or request to use test materials will be sent to Education Division (TAPC–PDE/APT), PERSCOM, 200 Stovall Street, STE 3N17, Alexandria, VA 22332–0472, for necessary action. A detailed justification must accompany such a requisition or request. The justification will state the purpose for which the test will be used, the number and type of personnel to be tested, and the qualifications of those who will be administered the test.

c. Testing of Army civilian employees. Normally, Army personnel tests are not used in civilian personnel administration. Approval for such use will be obtained from PERSCOM APT Program Manager (TAPC–PDE) in accordance with *b* above. This approval must be consistent with the guidance regarding the use of personnel tests issued by the Office of Personnel Management (OPM) or contained in Civilian Personnel Regulations issued by HQDA.

5–2. Release of test materials

a. Release procedures.

(1) Copies of Army personnel test components may be released to proper representatives of Federal, State, or location government agencies; friendly foreign governments; and private organizations and individuals. These releases will be made only if it does not jeopardize the usefulness of the test materials for current or future DA and DoD purposes. Also, releases must comply with the specifications of AR 340–21, AR 25–55, and 5 USC 552.

(2) The DCS, G–1 will establish policy for the release of Army personnel test materials (except foreign language selection and proficiency tests). The DCS, G–1 will make final determination for such release.

(3) The Commandant, DLIFLC will set policy for the release of foreign language aptitude and proficiency test materials and will make final determination for their release.

(4) Commander, PERSCOM will release other Army personnel test materials in conformance with policy established by DCS, G–1.

(5) Requests for release of Army personnel tests will be sent to Education Division (TAPC–PDE/APT), PERSCOM, 200 Stovall Street, STE 3N17, Alexandria, VA 22332–0472. In the case of release of Army personnel test materials, the gaining Government agency or foreign government may be requested to furnish operating statistics resulting from the use of these materials.

b. Special control for foreign government requests. Correspondence and materials to be forwarded to friendly foreign countries will be reviewed by the TAPC–PDE for technical factors or reasons of sensitivity. They will be transmitted as follows:

(1) Replies that contain classified materials will be routed through the Assistant Chief of Staff for Intelligence (ACSI) (ATTN: DAMI–FL), Washington, DC 20310, when sent to–

(a) Military Assistant Advisory Groups (MAAG) and Missions.

(b) Friendly foreign attachés in Washington, DC.

(c) Friendly governments to addresses outside the continental United States (CONUS).

(2) Replies that contain only unclassified material will be routed as shown below.

(a) Direct to Military Assistant Advisory Groups (MAAG) and Missions.

(b) Through DAMI–FL when sent to foreign attachés or other officials of friendly foreign governments.

(c) Through DAMI–FL when sent to an unofficial representative or nongovernmental person of a friendly foreign country.

(3) DAMI–FL will coordinate replies with Director of Counterintelligence (DAMI–CI) to insure that the release of such information is within the constraints of national disclosure policy.

Appendix A
References

Section I
Required Publications
AR 25–55
The Department of the Army Freedom of Information Act Program. (Cited in paragraph 5–2*a*(1).)
AR 25–400–2
The Modern Army Recordkeeping System (MARKS). (Cited in paragraphs 2–4*a*, 2–4*b*, 2–5*b*, 3–7*d*, and 3–9*g*.)
AR 350–20
Management of the Defense foreign Language Program. (Cited in paragraph 1–5*c*(1).)
DA Pam 600–8
Management and Administrative Procedures. (Cited in paragraph 2–1*a*(1).)

Section II
Related Publications
A related publication is a source of additional information. The user does not have to read a related publication to understand this regulation.
AR 15–6
Procedures for Investigating Officers and Boards of Officers.
AR 135–205
Enlisted Personnel Management.
AR 600–8–104
Military Personnel Information Management/Records.
AR 600–46
Attitude and Opinion Survey Program.
AR 601–210
Regular Army and Army Reserve Enlistment Program.
AR 614–200
Enlisted Assignments and Utilization Management.
AR 621–5
Army Continuing Education System (ACES).
NGR 310–10
Military Orders. Obtain on the Internet at http://www.ngbpdc.ngb.army.mil/arngfiles.asp.

Section III
Prescribed Forms
Except where otherwise indicated, the following forms are available on the Army Electronic Library (AEL) CD–ROM (EM 0001), the USAPA Web site (www.usapa.army.mil), or through the Education Division (TAPC–PDE/APT Dist. Ctr.), PERSCOM, 2461 Eisenhower Avenue Suite 803, Alexandria, VA 22331–0472.
DA Form 5159
Inventory of Army Personnel Test Material. (Prescribed in para 2–2.)
DA Form 5160

Test Administration Statement. (Prescribed in para 3–3.)
Various Forms
Army test material forms are available through the Army Distribution Operations Facility in St. Louis or through the Education Division (TAPC–PDE/APT Dist. Ctr.), PERSCOM, 2461 Eisenhower Avenue, Suite 803, Alexandria, VA 22331–0472.

Section IV
Referenced Forms
DA Form 2–1
Personnel Qualification Record–Part II
DA Form 4187
Personnel Action
DOD Form 1304.12K
Armed Services Vocational Aptitude Battery, Scoring Worksheet.

Appendix B
Hand-Scoring Army Personnel Tests
B–1. General
All Army personnel tests can be hand-scored even though they may also be machine-scorable. The guidance below applies to all tests that are hand-scored and have only one correct answer for each question. For scoring a test with more than one correct answer for each question, see the scoring section of the manual for that test.
B–2. Preparing answer sheets for scoring
a. Test having rights (R) score only. Examine each answer sheet for test questions that more than one answer has been marked and where there is no clear indication of the intended answer. For such questions, draw a blue line through each answer mark. Draw the blue line only through the marks and not through blank boxes for the item.

b. Tests with rights (R) and wrongs (W) in the scoring formula. Examine each answer sheet for omissions and for questions that more than one answer has been marked.
(1) For each question that has more than one answer marked and there is no clear indication of the intended answer, draw a blue line through each answer mark. Do not draw a line through the blank responses for these questions. (2) When no answer has been given for a question, draw a red line through all answer spaces for the questions.
B–3. Scoring the answer sheet
a. Counting right answers. Place the right scoring key, printed side up, over the answer sheet. Be sure that the edge of the key opposite the identification margin of the key is aligned with the edge of the answer sheet opposite the identification margin of the answer sheet. Count all marks that appear through the holes except those with a red or blue line drawn through them. This is the number of right (R) answers. Record this number in the box on the answer sheet as shown in the scoring directions for that test.

b. Counting wrong answers. To count wrong answers, align the right scoring key over the answer sheet. Count all unmarked answer spaces and all answer spaces having a blue line drawn through them. (Do not count those having red lines drawn through

them). This is the number wrong (W). Record this number in the box on the answer sheet as shown in the scoring directions for that test.

c. Checking. All scoring must be checked independently by a second person. The accuracy of the count can be checked by totaling the number of red lines (omissions), wrong answers, and right answers. The total should equal the highest possible score for the test. This maximum possible score will be shown in the scoring directions. Check to be sure that the response positions for all omitted questions have been marked with a red line; otherwise, omitted questions will be counted as wrong and the raw score will be incorrect.

B–4. Raw scores

a. Tests having a rights (R) scoring formula, the number right is called the raw score.

b. Tests with the scoring formula rights minus a fraction of wrongs, hand-scoring tables are usually found in the scoring directions. This allows the raw score to be read directly from a table. If there are no tables, the proportion of wrong answers shown in the scoring instructions will be subtracted from the right number. This result will be the raw score.

c. The raw score will be recorded in the box on the answer sheet as shown in the scoring directions.

B–5. Converted scores

It tests require conversion of raw scores, use conversion tables in the scoring manuals. The manuals contain directions for deriving percentile scores or standard scores from raw scores.

Glossary/Abbreviations

ACES
Army Continuing Education System

ACSI
Assistant Chief of Staff for Intelligence

AFCT
Armed Forces Classification Test

AGR
Active Guard Reserve

ARI
Army Research Institute

ARNG
Army National Guard

ASVAB
Armed Services Vocational Aptitude Battery

BSEP
Basic Skills Education Program

CONUS
continental United States

DCS, G–1

Deputy Chief of Staff, G–1
DFLP
Defense Foreign Language Program
DLIFLC
Defense Language Institute Foreign Language Center
FOUO
For Official Use Only
GED
general education development
MAAG
Military Assistant Advisory Groups
MEPCOM
Military Enlistment Processing Command
MILPO
military personnel office
OCS
officer candidate school
OPM
Office of Personnel Management
15 AR 611–5 • 10 June 2002
PERSCOM
U.S. Total Army Personnel Command
POC
point of contact
PSCO
personnel survey control officer
RA
Regular Army
SOP
standing operating procedure
TAG
The Adjutant General
TCO
test control officer
USAR
US Army Reserve
USARIBSS
US Army Research Institute for the Behavioral and Social Sciences

Section II
Terms
This section contains no entries.

Section III
Special Abbreviations and Terms
This section contains no entries.

USAPA
ELECTRONIC PUBLISHING SYSTEM
OneCol FORMATTER .WIN32 Version 177
PIN: 004410–000
DATE: 06-14-02
TIME: 14:16:02
PAGES SET: 20
DATA FILE: C:\wincomp\r611-5.fil
DOCUMENT: AR 611–5
DOC STATUS:REVISION

Tab 11

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Standard 11 Reference Excerpts

TR 350-70, para VI-6-9, Resources Identification.

Description a. All resources required to conduct the training are identified when designing that training. This normally occurs when creating the learning step/activity. There may be additional resource requirements to support an entire course. Total training resource requirements are compiled and included in appropriate training plans, POI, and TSP.

Outputs b. The output of this design step is a listing of all resource requirements, including ---

(1) Instructors.
(2) Support personnel.
(3) Classrooms.
(4) Training areas.
(5) Ammunition.
(6) OPTEMPO.
(7) Printing and reproduction.
(8) Range, and other facilities (Military Construction Army (MCA) projects, etc).
(9) Equipment (weapons, audiovisual, radios, etc.).
(10) Equipment support (maintenance, transport, etc.).
(11) Setup (e.g., miles, flight hours) *(optional)*.

Process Flow c. See "Learning Step/Activities Descriptive Details" (this chapter).

Quality Control d. For quality training, design personnel must ensure all ---

(1) Resources required to perform each learning step/activity are identified.
(2) Resource shortfalls and impact on mission accomplishment are identified and brought to command attention.

TR 350-18, para 3-9, Instructional products and training aids requisitioning.

a. Instructional products will be furnished by ATSC or Reimer Digital Library (RDL). The AC, ARNG and USAR will document resource requirements and the organizations providing resources in the ATRRS. Resource data will be shown by school and course by the unit identification code (UIC). The resource requirements will be for the execution year. Any changes to fiscal year (FY) school missions that occur as a result of TRAP actions must be reflected in the appropriate ATRRS resource display screens.

b. TASS training battalions are supported with instructional products from three distinct sources:

(1) The Visual Information/Training Support Center (VI/TSC) System. Training aids, devices, and visual information products and equipment, although often required in the conduct of courses, are not included in instructor or student sets, and are not provided by ATSC or RDL. These items must be requested, on a loan basis, from the appropriate VI/TSC. All TASS training battalions will establish and maintain accounts

with the VI/TSC serving their geographic location. Courseware products will be closely examined for required training aids, devices, simulations and equipment, and requests for such items will be made in sufficient time to support scheduled classes. Note that VI/TSC loans are made on a first-come, first-served basis. Adequate prior planning and coordination are essential to ensure responsive support. TASS training battalions should maintain copies of the following publications in their training support libraries:

- DA Pam 350-9
- DA Pam 350-100
- TRADOC Pam 350-9

(2) The Department of the Army administrative publications system. Some courses still require DA publications as instructor resources and/or as student texts. Such DA publications are not included in course instructor/student sets and must be requisitioned separately. All TASS training battalions will establish accounts with the U.S. Army Publications Distribution Center, St. Louis. Procedures for establishing and using DA publications accounts are found in AR 25-30 and DA Pam 25-33. Courseware products will be closely examined for required training aids, devices, simulations and equipment, and requests for such items will be made in sufficient time to support scheduled classes.

(3) Courseware reproduction/distribution system.

(a) Reproduction and distribution of TATS courseware/RC3 are requirements-based, driven by the ARPRINT and TRAP requirements. Courseware is reproduced and distributed by ATSC based on user requests received during established requisitioning windows for IDT and AT as follows:

- 1 February - AT requisitions due to ATSC for PLDC, BNCOC/ANCOC Common Leader, Phase I, BNCOC/ANCOC Phase II, First Sergeants Course (FSC), and NBC Defense.
- 1 November - AT requisitions due to Directorate of Non-Resident Studies (DNRS)/CGSC for CGSOC and CCC. CGSC will forward to ATSC.
- 1 June - IDT requisitions due to ATSC for BNCOC/ANCOC Common Leader Phase, Phase I, and NBC Defense.
- 1 April - IDT requisitions due to DNRS/CGSC for CGSOC and CCC. CGSC will forward to ATSC.
- For TAITC, SGITC, and SATBC requests through: Commander USATSC, ATTN: DLC-S, Fort Eustis, VA 23604-5166.

(b) All courseware user requirements are submitted using TRADOC Form 350-18-R-E. All requisitions are forwarded through appropriate channels to ATSC (TMSD-T). Sample TRADOC Form 350-18-R-E is at figure 3-1. Completion instructions are at appendix E.

(c) All courseware requisitions must be received by ATSC prior to the close of the appropriate requisition window. At the close of each window, ATSC consolidates the requirements, by course, into Basis-of-Issue Plans (BOIP). The BOIP determine how many courseware sets will be distributed.

(d) Submit requisitions to Commander, U.S. Army Training Support Center, ATTN: ATIC-TMSD-T, Bldg 1542, Fort Eustis, VA 23604-5168. DSN 927-5066/5072, Comm (757) 878-5066/5072.

(e) Training/TD (task) proponents may choose to reproduce, distribute, and manage TATS courses. The courseware can be multi-media and may involve distribution over video teletraining (VTT) or the Internet. Proponents will distribute courseware in response to the BOIP, promulgated by ATSC. ATSC and responsible training/TD (task) proponents distribute courseware so the products will be on hand prior to the training start date.

(f) Courseware requisitions received by ATSC outside the specified windows are called “out-of-cycle” requests. ATSC and training/TD (task) proponents maintain residual stockage of courseware against such contingencies, but when these supplies are exhausted, an additional printing of courseware materials may not be available.

c. Requisitions for course materials should be initiated for a particular phase or module, per the TATS course structure and the CMP implementation guidance, i.e., for a normal two-phased course, ADT phase/module should not be ordered at the same time as the IDT phase. Each phase should be ordered separately using TRADOC Form 350-18-R-E. See sample in figure 3-1.

d. TAG/DIV(IT) will ensure:

(1) All instructional products needed to conduct required classes are identified and requisitioned in sufficient time to ensure receipt prior to class start dates.

(2) Accountability for all products received is established and maintained.

(3) Cross-leveling of all available products is accomplished to the maximum practicable extent before requisitions for products are forwarded.

(4) All instructional products are identified, retained, conserved, cross-leveled, and shared.

e. Specific courseware responsibilities:

(1) TIE will monitor with ATSC and TASS regiments/brigades to resolve problems/issues concerning courseware requisitioning and delivery.

(2) Regional TASS regiments/brigades will—

(a) Review and approve/disapprove all justifications for issue of additional instructor sets, recoverable items in excess of authorized quantities, and all out-of-cycle requisitions and forward to ATSC or DNRS, as appropriate, and furnish a copy to the TIE.

(b) Direct inventory/accountability procedures which enable visibility and redistribution of all available courseware.

(3) TASS training battalions will—

(a) Maintain a training support master file of current courseware they are chartered to teach under TASS alignment.

(b) Provide courseware inventories as directed by TASS regiments/brigades.

(c) Establish test control procedure for Test Control Officer (TCO)/NCO that supports ARs 380-5 and 611-6.

- Provide training/TD (task) proponents, ATSC, with orders or memorandums appointing the TCO/NCO and a DA Form 1687 authorizing the TCO to request test material.
- Test material must be requisitioned on a separate TRADOC Form 350-18-R-E.
- Test will only be issued for courses requested and only one copy of each test version will be issued.
- Failure to maintain an account with training/TD (task) proponent or ATSC for test material will result in nonsupport of testing products.
- For TATS course testing material, establish test control account with proponent school.

f. Account establishment/maintenance.

(1) All TASS school codes must establish and maintain signature card accounts (DA Form 1687) with ATSC (ATTN: ATIC-TMSD-T).

(2) DA Form 1687 will be updated and resubmitted by 1 October of each year. A new form will be immediately submitted when personnel, address, or other changes occur which affect the DA Form 1687. ATSC must be notified immediately of changes to POC, telephone numbers, and addresses in order to ensure timely and efficient shipment of courseware.

g. Requisitioning procedures.

(1) TRADOC Form 350-18-R-E will be used to request courseware for both IDT and AT phases. A copy is provided at the back of this regulation for local reproduction.

(2) TASS regional regiment/brigade must forward out-of-cycle requisitions to ATSC, when required, 60 days prior to scheduled class start date.

(3) Requisitions for course materials should be initiated for only one phase/module at a time (i.e., for a normal two-phased course, the ADT phase should not be ordered at the same time as the IDT phase). Requirements for the second phase/module may be significantly different from initial enrollment in the first phase. For those few courses that are not packaged by phase/module, the entire course must be ordered at one time. In those cases, it is extremely important that course materials be conserved and brought to the ADT portion of the course, as a second requisition for the same class will not be honored.

(4) Instructor sets, in their entirety, are accountable/recoverable items, as are selected student materials so identified. If a course has been taught by TASS school code in the preceding 3 years, requisitions for additional instructor sets/materials and recoverable student materials must be justified on the basis of increased student load and/or additional instructors. Justification for additional or replacement recoverable materials must be forwarded with the TRADOC Form 350-18-R-E.

(5) In the event of canceled or rescheduled courses, increases or decreases in enrollment, or training site changes, ATSC should be notified by the most expeditious means available so that shipments in progress can be adjusted accordingly. Telephonic changes should be followed up with hard copy.

(a) When a change in training (delivery) location occurs and the change is not reported in sufficient time to redirect courseware shipment(s), TASS battalion

commander is responsible for receiving the shipment(s) and transporting to the proper training location.

(b) If a course/requirement is canceled, but the notification is not made in sufficient time to stop shipment of courseware, TASS battalion commander will report any excess to TASS regiment/brigade.

(c) If materials requirements increase after the initial request has been processed, TASS school code must inform ATSC at least 30 days prior to the training date.

h. Inventory and cross-leveling procedures.

(1) School codes will inventory all courseware quarterly and copy furnish TASS regional regiments/brigades and TIE.

(2) All course materials not required by TASS school code for the conduct of current year training will be identified to regional TASS regiments/brigades for cross-leveling to meet other current year requirements.

(3) Regional TASS regiments/brigades will supervise the cross-leveling of courseware within their regions and will report to ATSC any excess materials for cross-leveling among other regions.

TR 350-18, para 3-19, Resources.

a. TASS school codes are responsible for obtaining all resources associated with conducting the course IAW TASS cross component resourcing MOU. ISA/MOU will be established to facilitate borrowing equipment or facilities.

b. When equipment to support training is insufficient for all students or teams to perform to standard, the following considerations apply:

(1) If equipment nonavailability degrades training to the point that award of the MOS cannot be justified, training will not be conducted.

(2) An exception to policy/waiver must be approved by the training/TD (task) proponent before the start of scheduled training.

c. Whenever a TASS training battalion instructor performs IDT at a class location other than the normal duty station (NDS), and outside normal commuting distance (as defined in Joint Federal Travel Regulations), the instructor is authorized travel/per diem from either the NDS or residence, depending on departure point when directed to perform duty at a site other than the NDS. The NDS for TASS training battalion instructors is defined as the primary duty location where the instructor spends the majority of his/her time teaching. If the instructor does not spend the majority of his/her time at any one location within a fiscal year, then the TASS training battalion commander must designate the NDS either as the TASS training battalion headquarters or a teaching site. This is true whether the TASS training battalion commander has designated the school headquarters or a teaching site as a NDS. If the NDS is the teaching site, then the instructor would be entitled to travel/per diem to the school headquarters. However, if the TASS training battalion commander has designated the NDS to be the school

headquarters, the instructor is not entitled to reimbursement for travel to the TASS training battalion headquarters**.**

TR 350-18, para 3-20, Funding*.*
a. School training missions are developed during the SMDR IAW AR 350-10. The chiefs of each component are represented at the SMDR. Schools see their future training missions prior to the SMDR and have an opportunity to comment on their resource constraints. No school is given a mission unless its component agrees to provide the resources to execute the mission. Schools will not nonconduct classes because of resource constraints in the execution year, unless all components with quotas agree to the cancellation, or it is determined by HQDA that the necessary resources cannot be made available. Schools receive no reimbursement for students, regardless of the service or component of the student. Each Army component is responsible for providing sufficient total resources to train the number of students programmed to attend its schools as identified by ARPRINT. Resources, for the purpose of this regulation, are defined as:

(1) Manpower (staff and faculty).
(2) Facilities (instructional, billeting, and messing).
(3) Equipment, to include operating tempo (OPTEMPO).
(4) Supplies: classes I, II, III, III(P), IV, VIII, and IX.

b. Class II, personal clothing (uniform) requirements, will be determined by the school and shown in the ATRRS. The school will not issue personal clothing. The students' unit of assignment will ensure they report for training with the required individual clothing and equipment.

c. Class V. HQ TRADOC is the one-source contact to HQDA (DAMO-TRO) for all POI-driven class V requirements in support of the TASS. Class V requirements will be—

(1) Managed by TIE. The TIE in each region will act as a TRADOC installation to consolidate and report Class V requirements and obtain annual authorizations for the TASS training battalions in its area.

(2) Based upon the approved course and guidance in TRADOC Reg 350-8 and AR 5-13.

d. Personnel.

(1) Each component must provide personnel support to the other components, within the limits of their resources and ISA, to accomplish the TASS training mission.

(2) TRADOC will host a meeting in coordination with NGB and USARC, not later than 120 days prior to the beginning of the training year, to determine manpower shortfalls and negotiate necessary personnel support agreements among the components.

(3) Reimbursement among the military pay appropriations (National Guard Pay Appropriations (NGPA) and Reserve Pay Appropriations (RPA)), for services provided by one component in support of another component, may occur under certain circumstances. However, sufficient Funded Reimbursement Authority (FRA) must first

be obtained through the normal budgetary process. In order to ensure this authority is available, local support agreements must be negotiated and reported up the chain-of-command for aggregation and incorporation into budget submissions. NGB and HQ USARC will issue instructions to subordinate activities on procedures to report locally negotiated support agreements. NGB, OCAR and HQ USARC will review and reconcile the amounts that drive the requirement for FRA and will incorporate into budget submissions. NGB and USARC must approve all MOA to ensure there are sufficient funds available in the FRA in year of execution. Once approved, the funds are locked-in for that support. NGB and USARC then provides an open allotment fund site for the orders. In addition, NGB, OCAR and HQ USARC will negotiate summary level agreement concerning overall reimbursement between NGPA and RPA. In the year of execution, a Military Interdepartmental Purchase Requests (MIPR) will be exchanged between NGB and HQ USARC to effect the reimbursement. Lower echelons will not be required to process reimbursements, but will receive adjustments to their direct funding based on support agreements. Any questions concerning reimbursement among the military pay appropriations should be presented in resource management channels.

(4) Operations and Maintenance, Army, Operations and Maintenance, Army Reserve, and Operations and Maintenance, National Guard funds may be used to pay the travel and per diem costs of borrowed instructors or other personnel, regardless of component.

e. Equipment support.

(1) Short-term loan of equipment is governed by AR 700-131.

(2) Long-term loan of equipment is governed by DoD Directive 1225.6.

(3) The borrower will pay all costs associated with the use of borrowed equipment. Costs include preparation for issue and turn-in; transportation to and from the lender; OPTEMPO; and repairs (to include parts and manpower). Borrowed equipment will be returned to the lender in the same condition as when borrowed. The borrower will transfer funds to the lender to make repairs, if the borrower does not have repair capability.

(4) Borrowed equipment will pass a technical inspection (TI) at the organizational level, prior to shipment, both to and from the borrower. The condition of borrowed and returned equipment must normally meet -10/20 standards. However, TASS organizations may agree to terms and conditions different from -10/20 standards, when it is beneficial for a school to use equipment for training purposes that does not meet the standards. A joint TI will be conducted with representatives from both the borrowing and lending units present. If a joint TI is not possible, the borrower and lender will sign a memorandum of acceptance before the equipment is shipped.

f. Facilities.

(1) The component with the school mission is responsible for providing the facilities necessary to conduct training, without reimbursement.

(2) When a school wishes to conduct a course at facilities owned by another component, it will reimburse, via DD Form 448 (MIPR), the supporting installation or facility.

(3) The components are not responsible for providing facilities and services, without reimbursement, for “walk-on” students in excess of the maximum class size shown in ATRRS. “Walk-on” students in excess of the maximum class size may be transferred to another class or returned to their units of assignment, if another class is not available. The components may agree to provide the resources necessary to accommodate “walk-on” students.

g. Billeting. Installation commanders will make every effort to billet students on post. Installation commanders will not require students not in a temporary duty (TDY) status to maintain a course related bachelor officer quarters/bachelor enlisted quarters for which the student must pay.

(1) Courses currently conducted with billeting provided at no cost to the students, will continue as such.

(2) Billeting will be provided to students from all components on an equal basis, regardless of training status (e.g. AT, ADT, TDY or TDY and return).

(3) If government quarters are not provided, the school will provide students a non-availability statement so indicating, and the student will be reimbursed for his costs through normal per diem claim procedures.

(4) If a school uses contract facilities, such as dormitories on a civilian education campus, and incurs a cost for such use, the school may charge students a billeting fee. Students from all components will be charged equally. Students will be reimbursed through normal per diem claim procedures. If a school chooses not to charge students, the school is responsible for payment of the billeting costs.

h. Messing.

(1) Schools will provide government meals to students where possible. The operating costs of providing meals will be borne by the school.

(2) Personnel entitled to meals at government expense shall be furnished such meals at no cost to the individual, regardless of the individual’s component. In no case will a student from one component be required to pay a different amount than students from another component in the same or like training status.

(3) The component providing meals at government expense to personnel of the other components may obtain reimbursement. Reimbursement is accomplished at DA level.

(4) The school will provide students who are charged for meals a non-availability statement indicating such, and the student will be reimbursed through normal per diem claim procedures. In no case will students from one Army component be issued non-availability statements for the same training course in which government messing is available to students from another component.

DA PAM 350-38, Standards In Weapons Training (see Pamphlet).

Tab 12

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Standard 12 Reference Excerpts

TR 350-6, para 1-6c(5).
(5) Ensure cadre and support personnel attend the appropriate training course IAW paragraph 2-14 of this regulation.

TR 350-6, para 2-14, Risk management. Commanders and trainers of IET soldiers will utilize the principles and procedures established in FM 100-14, *Risk Management. Commanders will ensure cadre receive risk management training prior to their assuming sole control over the IET soldier.* The risk management process assists commanders in making informed, conscious decisions on eliminating unnecessary risks and in accepting residual risks inherent in accomplishing the mission.

TR 350-6, paras 3-1c&d, Initial Entry Training strategy. Initial Entry Training commanders and commandants will ensure their training programs incorporate the following tenets of TRADOC's IET strategy:

c. Primarily, SMEs will conduct MOS training; however, to the maximum extent feasible, drill sergeants will be involved in the technical training in AIT. Drill sergeants are the MOS role models. *They will assist with MOS skill practice and will, at times, be assigned additional duties as assistant instructors to augment SME instruction. Academic instructors must assist unit cadre in the soldierization effort.*

d. Cadre must be proficient in the tasks trained. Initial Entry Training commanders will establish certification programs IAW paragraph 3-6c to ensure that cadre have the competence and skill proficiency to execute and evaluate effective training.

TR 350-6, paras 3-6b&c, Lesson plans and instructor preparation.

a. The tasks and subjects in a POI form the basis for each period of instruction. Lesson plans will be prepared by the proponent and kept up-to-date for each period of instruction.

b. Each ATC and school will establish a system for monitoring and improving the quality of instruction. Essential to this is a standardization/certification process to ensure that each instructor is fully qualified and current in all aspects of their subject. This certification will be IAW TRADOC Reg 350-70. All IET instructors will accomplish semiannual physical fitness testing.

c. All IET cadre will accomplish semiannual physical fitness testing. All cadre responsible for conducting instruction and/or evaluating training will be certified on all hands-on phase tasks annually. Cadre in BCT/OSUT units will be certified on those phase tasks listed in the BCT POI and will also accomplish annual weapons qualification. Cadre in AIT units will provide reinforcement training on, and reevaluation

of, those BCT common skills tasks selected by the commander. Records of all certification or qualification will be maintained at the battalion level.

TR 350-6, Apx F.

Appendix F
Initial Entry Training Cadre/Support Personnel Training Requirements

F-1. Assigned personnel will attend the following IET cadre/ support personnel training as indicated:

a. TRADOC PCC: IET brigade and battalion commanders, and Command Sergeants Major. Brigade/battalion cadre (in key leadership positions such as Executive Officer (XO)/Operations Officer (S-3), as well as brigade UMT members and Training Center IG/Deputy IG, will attend TRADOC PCC on a space-available basis. Branch managers will use the ATRRS to schedule TRADOC PCC attendees.

b. Cadre Training Course: IET company commanders, first sergeants, XOs, company grade staff officers (S1-S4), brigade/battalion operations noncommissioned officers in charge, brigade/battalion cadre (in key leadership positions such as XO/S-3), and IET UMT members and all Training Center IGs who have not attended TRADOC PCC will attend CTC.

c. Support Cadre Training Course: All IET cadre who do not attend PCC or CTC and military and civilian IET primary instructors. The following personnel include, but are not limited to, brigade/battalion/company staff section NCOs, military IET instructors, DoD/DA civilian IET primary instructors, contracted civilian IET primary instructors, unit armorers, unit supply personnel, and RECBN processing NCOs.

d. Installation Staff Contractor's Training Course: All installation staff, medical, dental, and contract personnel, who in the execution of their duties, come into daily or frequent contact with IET soldiers. The following personnel include, but are not limited to, Clothing Initial Issue Point/Central Issue Facility employees, dining facility employees, medical personnel, dental personnel, and other civilian installation personnel (e.g., drug and alcohol representative).

F-2. All IET assigned personnel should attend specified IET cadre/support personnel training prior to but NLT 30 days after assuming their IET duties. Reserve component IET personnel will complete specified support personnel training NLT 120 days after assuming IET duties.

F-3. Commander, Fort Jackson, ATTN: ATZJ-PCC, Fort Jackson, SC 29207-5313, is the proponent for TRADOC PCC, CTC, SCTC, and ISCTC, and is responsible for the instructor certification process and course certification of the approved CTC sites. The following TRADOC installations/units are authorized to conduct CTCs: Forts Benning,

Bliss, Gordon, Huachuca, Jackson, Knox, Lee, Leonard Wood, Sill, and the DLIFLC (Monterey, CA). All USAR training divisions are authorized to conduct CTCs.

F-4. All TRADOC installations, TRADOC units on non-TRADOC installations, and USAR training divisions are authorized to conduct SCTCs and ISCTCs. Personnel (to include drill sergeants and former drill sergeants) authorized to instruct IET SCTC and IET ISCTC must be CTC-qualified and certified by their respective TRADOC installation/Division (Institutional Training) commander, or unit commander on non-TRADOC installations.

F-5. TRADOC installation personnel and personnel on non-TRADOC installations will attend CTC in one of the following modes:

a. Resident training at any approved IET CTC.

b. Mobile Training Team from Fort Jackson.

c. When available, TRADOC approved distance learning IET CTC.

F-6. USAR training division personnel will attend CTC in one of the following modes:

a. Resident training at home station approved IET CTC.

b. Resident training at affiliated installation's approved IET CTC.

c. When available, TRADOC approved distance learning IET CTC.

d. Mobile Training Team from affiliated installation.

F-7. Former drill sergeants and cadre/support personnel returning to IET positions after being out of the IET environment for more than 24 months will attend the appropriate training course.

F-8. The Fort Jackson proponent (ATTN: ATZJ-PCC) will host an annual cadre training conference and monitor TRADOC PCC, CTC, SCTC, and ISCTC certification to ensure compliance with this regulation.

F-9. All IET TRADOC installations (to include satellite AIT elements) and IET TRADOC units on non-TRADOC installations are required to report PCC, CTC, SCTC, and ISCTC attendance NLT the last Thursday of each quarter to the Fort Jackson proponent (ATTN: ATZF-PCC). All USAR training divisions will provide required reports quarterly through the USARC, ATTN: AFRC-OP, for collation and forwarding to the Fort Jackson proponent NLT the last Thursday of each quarter. The Fort Jackson proponent will consolidate all reports, and forward the completed quarterly training report to HQ TRADOC, ATTN: ATTG-IT, within 5 working days.

F-10. The IET CTC is not a replacement for officer and NCO professional development training. Commanders will ensure that regularly scheduled professional development classes are conducted for, and attended by, the IET cadre. These classes are not to be limited to IET issues; they should encompass all aspects of professional development.

F-11. The senior army commander/representative on non-TRADOC installations is responsible for coordination efforts with the non-TRADOC installation commander to ensure compliance with policies prescribed in this regulation.

TR 350-70

II-1-3. Training the Staff and Faculty - Description and Requirements

Description a. Through its three major components (instructor certification, Staff and Faculty Common Training, and local SFD programs), the TRADOC Staff and Faculty Development Program ---

(1) Provides the specific skills and knowledge needed by staff and faculty personnel to achieve standards of acceptable performance.

(2) Expands the capabilities of assigned staff and faculty personnel to keep pace with emerging training technologies.

Outputs b. The SFDP provides the Training/(TD) Task Proponent:

(1) Certified instructors.

(2) Instructors/facilitators/staff fluent in the instructional delivery and implementation procedures that apply to various methods and media.

(3) Training developers who can successfully apply the Systems Approach to Training (SAT) process to produce effective and efficient Army training courses, programs, and products.

(4) TD managers who can effectively organize and apply resources to support the analysis of job performance requirements and the design, development, implementation, and evaluation of programs, products, and courses.

SFCT Objectives c. The major objectives of SFCT are to ---

(1) Establish minimum performance standards for personnel assigned to TRADO staff and faculty positions.

(2) Specify required standardized SFCT courses for each staff and faculty function.

(3) Ensure job-oriented training that provides the competencies needed to successfully do their jobs is available to all staff and faculty personnel.

(4) Standardize staff and faculty development training to eliminate duplication of effort and to conserve training development resources.

SFCT Courses

d. The following table shows the SFCT required for each staff and faculty function:

Staff and Faculty	Required SFTP Training	Source/ Location
Senior training managers. ***Examples**:* • ODCST Directors • Directors of Training and Doctrine (DOTD) or Dir of Training (DOT) • Training Department Directors • Assistant Commandants	Senior Training Managers' Course	DCST/TDAA Centralized
All school personnel who manage training or SAT personnel or products.	Training Developer Middle Managers' Course	DCST/TDAA Centralized
Instructors	Total Army Instructor Training Course (TAITC)	Local Staff and Faculty elements; ATSC (via Video Teletraining [VTT])
Small Group Leaders/ Facilitators	• TAITC • Small Group Instructor Training Course (SGITC)	Local Staff and Faculty elements; ATSC (via VTT)
VTT Instructors or Facilitators	• Video Teletraining Instructor Training Course (VTTITC) • TAITC •* SGITC	ATSC (via VTT) ***Note:*** TAITC and SGITC offered by local Staff and Faculty elements.
Training developers (required for all duty positions)	• Systems Approach to Training Basic Course (SATBC) • Automated Systems Approach to Training Course (TBD)	Local Staff and Faculty elements; ATSC (Via VTT)
Training developers who are performing design and development functions	• Interactive Multimedia Instruction Developer's Workshop • Test Developer Course (TBD) • Designer's Edge	ATSC - all courses; Local Staff and Faculty elements - Designer's Edge only

*Only when working with courses using small group instruction.

SFCT Courses (Continued)

Staff and Faculty	Required SFTP Training	Location/Source
ATL writers	Automated Systems Approach to Training Course (TBD)	Local Staff and Faculty elements; ATSC
Evaluators	• Training Evaluator Course • SATBC ***Note:*** For additional requirements, see Chapter III-1, Evaluation and Quality Assurance Program Description and Requirements	Local Staff and Faculty elements - both courses; ATSC (via VTT) - SATBC only.

Local SFD Program Objectives

e. Local Staff and Faculty Development Program objectives are to ---

(1) Establish and maintain a single staff and faculty development functional element at each installation.

(2) Ensure all personnel performing duties relating to the conduct or development of training or to the management of the conduct or development of training receive job-oriented training that provides the competencies needed to successfully do their job.

(3) Develop local policies/procedures for conducting staff and faculty development.

(4) Provide local support for instructor certification and the SFCT components of the SFDP.

Local SFD Program Requirements

f. Major requirements for local SFD programs are as follows ---

(1) Establish a school SFD functional element as the primary agency for delivering and coordinating staff and faculty development.

(2) Staff the school SFD functional element at a sufficient level to. provide all required training

(3) Develop policies and procedures to ensure that instructors are technically and tactically qualified for their instructor assignment.

(4) Conduct a local SFD program that includes both TRADOC Staff and Faculty Common Training courses and locally developed courses that satisfy local training needs.

(5) Use the SAT process to develop and modify local courses.

(6) Train all members of the staff and faculty to perform tasks required for their specific job assignment.

(7) Establish instructor recognition programs at each school to foster professionalism.

(8) Approve (school commandants or designated representatives) all locally developed course designs before staff and faculty development element fully implements the course.

(9) Re-certify instructors (as required) through full participation in the four scored presentations, using TAITC instructor-approved lesson plans with regularly scheduled classes.

Local SFD Program Requirements (Continued)

(10) Re-certify small group instructors (as required) through successful performance demonstrated by the small group instructor that is observed and documented by a certified small group instructor.

(11) Ensure all commissioned officers, warrant officers (WOs), and enlisted soldiers assigned as instructors or as training developers have completed the required courses before award of the SI or SQI.

Identifiers	CO	WO	Enliste
TD	7Q	N/A	2
Instructor	5K	8	H

Note: SQI-X (drill instructor qualified) does not provide qualifications for SQI H award.

Instructor Certification Requirements

g. Instructor certification requirements and associated policy are as follows:

Activity	Requirements
(1) Training/TD (Task) Proponents	(a) Establish instructor certification requirements for each proponent course. ***Note:*** Certification time cannot exceed the time available to the Reserve Component during one TATS Training Year. 1 Include TAITC, subject matter competence, teaching competence, and other mandated instructor requirements. 2 Specify specific instructor grade levels. (See AR 611-201.) 3 Ensure standardization across components (Active Component, US Army National Guard, US Army Reserve, and DA civilians) for each proponent course. 4 Include technical/tactical recertification requirements. (Proponents should specify the maximum number of years allowed since the instructor last taught the course before the instructor must be re-certified.) (b) Publish course instructor certification requirements. ***Note:*** These requirements will be included in the CMP when a CMP is produced. (c) Establish and maintain a chain of command-conducted certification program/board. (d) Conduct periodic and comprehensive instructor evaluations coupled with an effective remedial program.

	Note: See Chapter VI-8, Training Course Development (this regulation).
(2) Chain of Command (Certification Boards)	**(a) Ensure instructors meet all course certification requirements.** *Note:* **Supervisor-written documentation is acceptable for all non-proponent specific requirements.** (b) Ensure instructor competence through --- 1 Observation of ability to train course objectives. 2 Documentation of mastery of course content (observation or recent graduation).

TR 350-70, III-2-6. Accreditation Evaluator Qualifications.

Guidance a. Evaluators are the eyes and ears of the accrediting authority; they represent the accrediting authority wherever they evaluate training in Army schools worldwide. Accordingly, proponent service school commandants will ensure their evaluators are a credit to their command in their bearing, competence, professionalism, and commitment to excellence in training. Proponent service school commandants verify and certify the qualifications of accreditation evaluators from that Training/TD (Task) Proponent.

Qualifications b. New accreditation evaluators will be required to perform evaluation duties under the close supervision of a fully qualified and experienced evaluator, until deemed by the Director of Evaluation and Standardization (DOES) (or equivalent functional element) to be fully qualified to represent the proponent and perform evaluation duties without supervision. Specific requirements are as follows:

(1) The *accreditation team chief* must meet all evaluator criteria and be---

(a) Thoroughly familiar with regulations governing Training Support and Conduct of Training in TASS schools.
(b) Able to draw together all the findings and recommendations of accreditation team evaluators into an Accreditation Summary Report which is suitable for general officer review.
(c) Able to resolve any differences which may arise among evaluators or between evaluators and the staff of the school being evaluated.
(d) Able to assist in the resolution of discrepancies in training to standard.

(2) The *accreditation team evaluator* must be---
(a) Thoroughly familiar with the regulations governing Training Support/Conduct of Training in TASS schools.
(b) Familiar with the format of POIs, Course Management Plans (CMPs), lesson plans, and Training Support Packages (TSP) in order to effectively use these materials in evaluating instruction.
(c) Imbued with the idea that their mission is to insist on standards being met and to assist schools in meeting those standards. In this sense, they are leaders and instructors.
(d) A graduate of an Instructor Training Course (ITC) and, if the course under evaluation is taught in the small group method of instruction, must have completed a Small Group Instructor (SGI) Course.

(3) The *subject-matter expert* evaluating Conduct of Training must---
(a) Be a graduate of the course being evaluated.
(b) Hold the CMF of the course being evaluated.
(c) Be a graduate of an ITC and, if the course under evaluation is taught in the small group method of instruction, must have completed a SGI Course.
(d) Be familiar with the format of POI, CMP, lesson plans, and TSP and be able to effectively use these materials in evaluating instruction using Part II (Conduct of Training) of the Accreditation Checklist and any proponent-specific checklists.

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Tab 13

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Standard 13 Reference Excerpts

See: FM 7-100 (draft); FM 7-100-1 (draft); FM 7-100-2 (draft); FM 7-100-3 (draft)

See: FM 3-0, OPFOR

See: COE White Paper, May 2001

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Tab 14

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TR 350-70, para II-I-2(4).

(4) Commanders/ Commandants, Training/TD (Task) Proponents; Army Training Centers	(a) Establish, staff, and maintain SFD Division or functional equivalent to conduct SFCT courses required for initial skills development and skill sustainment for all staff and faculty personnel. (b) Develop local SFD policies and procedures, as necessary, to support policy in this regulation. (c) Provide school personnel to serve as subject matter experts and training developers to develop SFCT curricula materials. (d) Support local requirements for SFCT, using TRADOC-mandated materials that train to TRADOC standards. (e) Provide all trainers and training managers appropriate specialized training, (e.g., development of multimedia products; TD contract management) before or immediately after assuming a new duty position. (f) Approve POIs for all locally produced SFD courses. (g) Certify instructors to train proponent courses at all sites.
	(h) Ensure instructors are trained and fully certified prior to conducting training. (i) Cancel or postpone SFD courses at least 72-hours before scheduled time when certified staff and faculty development instructor will not be available. (j) Establish: 1 A chain-of-command-conducted instructor certification program/board for each proponent course. 2 Board composition and procedures. 3 Course-specific instructor certification requirements for each proponent course. ***Note:*** Requirements must be achievable within the TATS Training Year. 4 Instructor technical/tactical recertification requirements for instructors who have not taught a specific functional course for a number of years (but not less than three).

(k) Publish instructor technical/tactical certification requirements for all courses taught at more than one site in CMP. If no CMP, may also include under the "Special Remarks" section of the POI's course administrative data requirement to recognize certification resource requirements. The entire instructor certification process, to include successful completion of TAITC and course-specific instructor certification requirements, must be completed in one TATS Training Year.

(l) Require TAITC and Small Group Instructor Training Course (SGITC) recertification for personnel with instructor designators or small group leaders who have not exercised instructor responsibilities during the last five years.

(m) Conduct periodic and comprehensive instructor evaluations coupled with remedial programs.

(n) Train staff and faculty on environmental protection.

(o) Conduct safety, risk assessment/management, and environment protection training for staff and faculty.

(p) Ensure staff and faculty course design and development requirements are entered into the automated TD workload management database, currently Automated Systems Approach to Training (ASAT) (Resource Management menu option).

(q) Solicit Training Career Program (CP) 32 and Information Management CP 34 dollars for multimedia training. Provide proposal to CP 32 and CP 34 program managers, explaining the value added and the relationship between cost and the benefit to be achieved.

(r) Ensure that all TRADOC SFCT courses conducted at their sites are loaded into the Army Training Requirements and Resource System (ATRRS) to ensure maintenance of a permanent record of student achievement.

(s) Ensure that all instructors (to include contractor personnel) delivering SFCT courses meet instructor certification requirements as established by the SFDP proponent.

Responsibilities (Continued)

Activity	Responsibilities
(5) SFD Element at Schools/ Training Centers	(a) Schedules and tracks required training for staff and faculty personnel. (b) Structures training for professional development to allow for career progression. (c) Develops staff and faculty development training IAW this regulation. (d) Assists the Training Career Program 32 Activity Career Program Manager in training DA and local interns. (e) Provides consultation concerning training and training development, to include training technology and professional development of trainers. (f) Retains for chain-of-command review approved staff and faculty development course POIs in accordance with Chapter II-8, Training Requirements Analysis System. (g) Identifies additional school personnel training requirements to sustain existing skills and to support new training technology, techniques, and methods. (h) Certifies completion of required instructor training. (i) Exercises quality control of staff and faculty training in meeting individual and organizational needs. (j) Maintains records of completed staff and faculty training. (k) Prepares and issues certificates or diplomas to staff and faculty course graduates. (l) Distributes information on new training technology and training techniques and methods. (m) Submits staff and faculty courses to HQ TRADOC (DCST) for review by the ACE for college credit. (n) Conducts SFCT courses IAW Individual Training Plan.

TR 350-70, para III-4-1/2, Evaluating Instructor Performance.
III-4-1.

Introduction a. This chapter provides criteria for evaluation of ---

(1) Basic instructor performance --- these criteria are required of all instructors regardless of the method or media used or the training site.
(2) Classroom instructor performance.
(3) Video teletraining (VTT) instructor performances.
(4) Small group instructor performances.
(5) Preparation for and conduct of the After Action Reviews (AAR).

Note: The reproducible checklists for each of these evaluations can be found at the back of this chapter.

Chapter Index

b. This chapter covers the following:

Content	Para Number
Instructor Evaluation Criteria - All Instructors	III-4-2
Basic Instructor Performance Checklist	III-4-3
Classroom Instructor Performance Checklist	III-4-4
Video Teletraining (VTT) Instructor Performance Checklist	III-4-5
Small Group Instructor Performance Checklist	III-4-6
After Action Review (AAR) Checklist	III-4-7

III-4-2. Instructor Evaluation Criteria – All Instructors

Basic Instructor Performance

a. The following criteria applies to all instructors regardless of whether the training is conducted in a traditional classroom, in a small group environment, or via video-teletraining. The Basic Instructor Performance Checklist can be found at paragraph number III-4-3. The checklist provides greater detail for evaluating these criteria. To meet acceptable performance standards, the instructor must ---

(1) Implement risk control measures.
(2) State Terminal Learning Objective.
(3) Demonstrate technical or tactical competence.
(4) Introduce the instruction.
(5) Present learning steps/actions.
(6) Explain the relationship of task or training activity to job performance.
(7) Generate questions/obtain feedback.
(8) Use training aids to support learning.
(9) Ensure that all students can see and hear all activities.
(10) Exhibit acceptable personal appearance.
(11) Demonstrate basic delivery skills.
(12) Use appropriate questioning techniques.
(13) Facilitate student performance.
(14) Exhibit respectful behavior.
(15) Provide interim and concluding summaries.

(16) Demonstrate effective management of training resources.
(17) Conduct AAR.

Classroom Instructor Performance

b. These additional criteria apply to instructors who are training in a classroom environment. The Classroom Instructor Performance Checklist can be found at Paragraph III-4-4. In addition to the basic instructor performances, the classroom instructor must ---

(1) Manage the training environment to promote learning, comfort, safety, and hygiene.
(2) Maintain a Visitors Folder in accordance with local policy.

VTT Instructor Performance

c. These additional criteria apply to instructors who are conducting training via VTT. The Video Teletraining (VTT) Instructor Performance Checklist can be found at Paragraph III-4-5. In addition to the basic instructor performances, the VTT instructor must ---

(1) Establish eye contact with the camera.
(2) Operate the media effectively.
(3) Develop and use effective visual aids.

Small Group Instructor Performance

d. These additional criteria apply to instructors who are conducting small group training. The Small Group Instructor Performance Checklist can be found at Paragraph III-4-6. In addition to the basic instructor performances, the small group instructor must ---

(1) Demonstrate the three small group roles.
(2) Facilitate the group during the Experiential Learning Cycle.

AAR Instructor Performance Checklist

e. These criteria apply to all instructors. The AAR Instructor Performance Checklist can be found at paragraph III-4-7. In addition to the basic instructor performances and any other appropriate criteria, the instructor must ---

(1) Prepare AAR outline.
(2) Prepare the training area for the AAR.
(3) Introduce the purpose for the AAR.
(4) Present training events for consideration.
(5) Facilitate student participation.

TR 350-18, paras 2-19f&g.

f. Actively supervise, monitor, observe and evaluate instruction/instructors at all teaching sites in the region under their coordinating authority.

g. Ensure course managers, or other qualified staff in the appropriate CMF, evaluate all instructors on a regular basis. Forward a copy of the instructor's evaluation results to the instructor and the TASS battalion for filing, IAW TRADOC Reg 350-70.

TR 350-10, para 2-14a(4).

2-14. Small group leader, senior small group leader and instructor standards. The success of institutional training depends on having experienced SGLs, SSGLs and instructors who are leadership mentors, role models, and teachers. Small group leaders, SSGLs and instructors conduct leadership assessments, counseling, and assist students to identify strengths, weaknesses, and actions to improve performance. They are responsible for student physical conditioning, control, discipline, and administrative requirements; training specified common core tasks in all courses; and training and reinforcing specified branch tasks in branch courses. Minimum SGL, SSGL and instructor training and qualification standards are contained in TRADOC Reg 350-70. Additionally—

a. Commandants or designated representatives—

(1) Will ensure soldiers selected to be SGLs meet the grade, MOS and skill level/assignment experience criteria and physical fitness capabilities of the course they will be assigned to conduct/mentor. SGLs must be of like-MOS (except for PLDC and BNCOC or ANCOC Common Core) and be a graduate of the courses they teach, except as described in paragraph 2-14a(3) below.

(2) For pilot/newly fielded courses, will ensure SGL and instructors complete a train-the-trainer course to meet qualification criteria outlined in the CMP and receive constructive credit as outlined in AR 350-1.

(3) For low-density MOS BNCOC and ANCOC, or when soldier attends the Phase I TASS Common Core at an approved location other than his/her MOS proponent school, commandants may substitute other like-level career progression SGLs in a different MOS when qualified SGLs are not available in the correct MOS. Substitute SGLs must satisfy CMP qualification requirements.

(4) Will provide SGLs, SSGLs and instructors a quarterly written evaluation (except for part-time NCOAs where infrequent class scheduling may only allow evaluations opportunities semi-annually). These evaluations are useful in incentive and recognition programs, as well as for TRADOC-wide competition.

TR 350-16, para 3-7.
Installation internal evaluations. AC installation/training center commanders and RC training divisions will conduct internal quality assurance evaluations once every 12 months, using the accreditation checklist in TRADOC Reg 351-18. Copies of the internal evaluations are required to be available for the next scheduled accreditation.

TR 350-6, para 1-6b(3).

(3) Establish a quality assurance program IAW TRADOC Reg 350-70 to evaluate the effectiveness of training programs for which they are proponent. Evaluation will include a thorough assessment of feedback from the field, as well as an assessment of teaching methods being used at course sites.

TR 350-6, para 3-6b.

b. Each ATC and school will establish a system for monitoring and improving the quality of instruction. Essential to this is a standardization/certification process to ensure that each instructor is fully qualified and current in all aspects of their subject. This certification will be IAW TRADOC Reg 350-70. All IET instructors will accomplish semiannual physical fitness testing.

Fort Leonard Wood Regulation 350-1. FLW Instructor Certification Program

Chapter 2 CERTIFICATION AND QUALITY CONTROL

2-5. Quality Control Procedures.

a. The quality control referred to in this section is internal quality control. Instructor supervisors and training managers are responsible for carrying out the procedures in their area of responsibility.

b. Maintain instructor records on each instructor presenting training. Instructor records will, at a minimum include:

(1) ITC training certificate.

(2) In-service training and ISD training certificates. (3) A copy of orders awarding the Instructor Skill Qualification Indicator/Identifier as applicable to the instructor's service.

(4) Instructor observations retard, FLW Form 752-1-R. (5) Libby NCOA will use guidelines in TRADOC Reg 351-10.

2-6. Recertification.

a. If a certified instructor has not been assigned in a military instructor position for five or more years they must be recertifed by attending an instructor training program approved by their service.

b. If a certified instructor has not taught a specific course for three or more years they must be recertified in their subject matter through a certification board. The certification board will be conducted in the'same manner as an initial certification board.

FM 22-100, Apx C, Developmental Counseling.

C-1. Subordinate leadership development is one of the most important responsibilities of every Army leader. Developing the leaders who will come after you should be one of your highest priorities. Your legacy and

the Army's future rests on the shoulders of those you prepare for greater responsibility.

C-2. Leadership development reviews are a means to focus the growing of tomorrow's leaders. Think of them as AARs with a focus of making leaders more effective every day. These important reviews are not necessarily limited to internal counseling sessions; leadership feedback mechanisms also apply in operational settings such as the CTCs.

C-3. Just as training includes AARs and training strategies to fix shortcomings, leadership development includes performance reviews. These reviews result in agreements between leader and subordinate on a development strategy or plan of action that builds on the subordinate's strengths and establishes goals to improve on weaknesses. Leaders conduct performance reviews and create plans of action during developmental counseling.

C-4. Leadership development reviews are a component of the broader concept of developmental counseling. Developmental counseling is subordinate-centered communication that produces a plan outlining actions that subordinates must take to achieve individual and organizational goals. During developmental counseling, subordinates are not merely passive listeners; they're actively involved in the process. The Developmental Counseling Form (DA Form 4856-E, which is discussed at the end of this appendix) provides a useful framework to prepare for almost any type of counseling. Use it to help you mentally organize issues and isolate important, relevant items to cover during counseling sessions.

C-5. Developmental counseling is a shared effort. As a leader, you assist your subordinates in identifying strengths and weaknesses and creating plans of action. Then you support them throughout the plan implementation and assessment. However, to achieve success, your subordinates must be forthright in their commitment to improve and candid in their own assessment and goal setting.

THE LEADER'S RESPONSIBILITIES

C-6. Organizational readiness and mission accomplishment depend on every member's ability to perform to established standards. Supervisors must mentor their subordinates through teaching, coaching, and counseling. Leaders coach subordinates the same way sports coaches improve their teams: by identifying weaknesses, setting goals, developing and implementing plans of action, and providing oversight and motivation throughout the process. To be effective coaches, leaders must thoroughly understand the strengths, weaknesses, and professional goals of their subordinates. (Chapter 5 discusses coaching.)

C-7. Army leaders evaluate DA civilians using procedures prescribed under the Total Army Performance Evaluation System (TAPES). Although TAPES doesn't address developmental counseling, you can use DA Form 4856-E to counsel DA civilians concerning professional growth and career goals. DA Form 4856-E is not appropriate for documenting counseling concerning DA civilian misconduct or poor performance. The servicing civilian personnel office can provide guidance for such situations.

C-8. Soldiers and DA civilians often perceive counseling as an adverse action. Effective leaders who counsel properly can change that perception. Army leaders conduct counseling to help subordinates become better members of the team, maintain or improve performance, and prepare for the future. Just as no easy answers exist for exactly what to do in all leadership situations, no easy answers exist for exactly what to do in all counseling situations. However, to conduct effective counseling, you should develop a counseling style with the characteristics listed in Figure C-1.

- **Purpose:** Clearly define the purpose of the counseling.
- **Flexibility:** Fit the counseling style to the character of each subordinate and to the relationship desired.
- **Respect:** View subordinates as unique, complex individuals, each with a distinct set of values, beliefs, and attitudes.
- **Communication:** Establish open, two-way communication with subordinates using spoken language, nonverbal actions, gestures, and body language. Effective counselors listen more than they speak.
- **Support:** Encourage subordinates through actions while guiding them through their problems.

Figure C-1. Characteristics of Effective Counseling

THE LEADER AS A COUNSELOR

C-9. Army leaders must demonstrate certain qualities to be effective counselors. These qualities include respect for subordinates, self-awareness and cultural awareness, empathy, and credibility.

RESPECT FOR SUBORDINATES

C-10. As an Army leader, you show respect for subordinates when you allow them to take responsibility for their own ideas and actions. Respecting subordinates helps create mutual respect in the leader-subordinate relationship. Mutual respect improves the chances of changing (or maintaining) behavior and achieving goals.

SELF AWARENESS AND CULTURAL AWARENESS

C-11. As an Army leader, you must be fully aware of your own values, needs, and biases prior to counseling subordinates. Self-aware leaders

are less likely to project their biases onto subordinates. Also, aware leaders are more likely to act consistently with their own values and actions.

C-12. Cultural awareness, as discussed in Chapter 2, is a mental attribute. As an Army leader, you need to be aware of the similarities and differences between individuals of different cultural backgrounds and how these factors may influence values, perspectives, and actions. Don't let unfamiliarity with cultural backgrounds hinder you in addressing cultural issues, especially if they generate concerns within the organization or hinder team-building. Cultural awareness enhances your ability to display empathy.

EMPATHY

C-13. Empathy is the action of being understanding of and sensitive to the feelings, thoughts, and experiences of another person to the point that you can almost feel or experience them yourself. Leaders with empathy can put themselves in their subordinate's shoes; they can see a situation from the other person's perspective. By understanding the subordinate's position, you can help a subordinate develop a plan of action that fits the subordinate's personality and needs, one that works for the subordinate. If you don't fully comprehend a situation from your subordinate's point of view, you have less credibility and influence and your subordinate is less likely to commit to the agreed upon plan of action.

CREDIBILITY

C-14. Leaders achieve credibility by being honest and consistent in their statements and actions. To be credible, use a straightforward style with your subordinates. Behave in a manner that your subordinates respect and trust. You can earn credibility by repeatedly demonstrating your willingness to assist a subordinate and being consistent in what you say and do. If you lack credibility with your subordinates, you'll find it difficult to influence them.

LEADER COUNSELING SKILLS

C-15. One challenging aspect of counseling is selecting the proper approach to a specific situation. To counsel effectively, the technique you use must fit the situation, your capabilities, and your subordinate's expectations. In some cases, you may only need to give information or listen. A subordinate's improvement may call for just a brief word of praise. Other situations may require structured counseling followed by definite actions.

C-16. All leaders should seek to develop and improve their own counseling abilities. You can improve your counseling techniques by studying human behavior, learning the kinds of problems that affect your

subordinates, and developing your interpersonal skills. The techniques needed to provide effective counseling will vary from person to person and session to session. However, general skills that you'll need in almost every situation include active listening, responding, and questioning.

ACTIVE LISTENING

C-17. During counseling, you must actively listen to your subordinate. When you're actively listening, you communicate verbally and nonverbally that you've received the subordinate's message. To fully understand a subordinate's message, you must listen to the words and observe the subordinate's manners. Elements of active listening you should consider include—

- **Eye contact.** Maintaining eye contact without staring helps show sincere interest. Occasional breaks of contact are normal and acceptable. Subordinates may perceive excessive breaks of eye contact, paper shuffling, and clock-watching as a lack of interest or concern. These are guidelines only. Based on cultural background, participants in a particular counseling session may have different ideas about what proper eye contact is.
- **Body posture.** Being relaxed and comfortable will help put the subordinate at ease. However, a too-relaxed position or slouching may be interpreted as a lack of interest.
- **Head nods.** Occasionally nodding your head shows you're paying attention and encourages the subordinate to continue.
- **Facial expressions.** Keep your facial expressions natural and relaxed. A blank look or fixed expression may disturb the subordinate. Smiling too much or frowning may discourage the subordinate from continuing.
- **Verbal expressions.** Refrain from talking too much and avoid interrupting. Let the subordinate do the talking while keeping the discussion on the counseling subject. Speaking only when necessary reinforces the importance of what the subordinate is saying and encourages the subordinate to continue. Silence can also do this, but be careful. Occasional silence may indicate to the subordinate that it's okay to continue talking, but a long silence can sometimes be distracting and make the subordinate feel uncomfortable.

C-18. Active listening also means listening thoughtfully and deliberately to the way a subordinate says things. Stay alert for common themes. A subordinate's opening and closing statements as well as recurring references may indicate the subordinate's priorities. Inconsistencies and gaps may indicate a subordinate's avoidance of the real issue. This confusion and uncertainty may suggest additional questions.

C-19. While listening, pay attention to the subordinate's gestures. These actions complete the total message. By watching the subordinate's actions, you can "see" the feelings behind the words. Not all actions are proof of a subordinate's feelings, but they should be taken into consideration. Note differences between what the subordinate says and does. Nonverbal indicators of a subordinate's attitude include—

- **Boredom.** Drumming on the table, doodling, clicking a ball-point pen, or resting the head in the palm of the hand.
- **Self-confidence.** Standing tall, leaning back with hands behind the head, and maintaining steady eye contact.
- **Defensiveness.** Pushing deeply into a chair, glaring at the leader, and making sarcastic comments as well as crossing or folding arms in front of the chest.
- **Frustration.** Rubbing eyes, pulling on an ear, taking short breaths, wringing the hands, or frequently changing total body position.
- **Interest, friendliness, and openness.** Moving toward the leader while sitting.
- **Openness or anxiety.** Sitting on the edge of the chair with arms uncrossed and hands open.

C-20. Consider these indicators carefully. Although each indicator may show something about the subordinate, don't assume a particular behavior absolutely means something. Ask the subordinate about the indicator so you can better understand the behavior and allow the subordinate to take responsibility for it.

RESPONDING

C-21. Responding skills follow-up on active listening skills. A leader responds to communicate that the leader understands the subordinate. From time to time, check your understanding: clarify and confirm what has been said. Respond to subordinates both verbally and nonverbal. Verbal responses consist of summarizing, interpreting, and clarifying the subordinate's message. Nonverbal responses include eye contact and occasional gestures such as a head nod.

QUESTIONING

C-22. Although questioning is a necessary skill, you must use it with caution. Too many questions can aggravate the power differential between a leader and a subordinate and place the subordinate in a passive mode. The subordinate may also react to excessive questioning as an intrusion of privacy and become defensive. During a leadership development review, ask questions to obtain information or to get the subordinate to think about a particular situation. Generally, the questions should be open-ended so as to evoke more than a yes or no answer. Well-posed questions may help to verify understanding, encourage further

explanation, or help the subordinate move through the stages of the counseling session.

COUNSELING ERRORS

C-23. Effective leaders avoid common counseling mistakes. Dominating the counseling by talking too much, giving unnecessary or inappropriate "advice," not truly listening, and projecting personal likes, dislikes, biases, and prejudices all interfere with effective counseling. You should also avoid other common mistakes such as rash judgments, stereotypes, loss of emotional control, inflexible methods of counseling and improper follow-up. To improve your counseling skills, follow the guidelines in Figure C-2.

- Determine the subordinate's role in the situation and what the subordinate has done to resolve the problem or improve performance.
- Draw conclusions based on more than the subordinate's statement.
- Try to understand what the subordinate says and feels; listen to what the subordinate says and how the subordinate says it.
- Show empathy when discussing the problem.
- When asking questions, be sure that you need the information.
- Keep the conversation open-ended; avoid interrupting.
- Give the subordinate your full attention.
- Be receptive to the subordinate's feelings without feeling responsible to save the subordinate from hurting.
- Encourage the subordinate to take the initiative and to say what the subordinate wants to say.
- Avoid interrogating.
- Keep your personal experiences out of the counseling session unless you believe your experiences will really help.
- Listen more; talk less.
- Remain objective.
- Avoid confirming a subordinate's prejudices.
- Help the subordinate help himself.
- Know what information to keep confidential and what to present to the chain of command.

Figure C-2. Guidelines to Improve Counseling

THE LEADER'S LIMITATIONS

C-24. Army leaders can't help everyone in every situation. Even professional counselors can't provide all the help that a person might need. You must recognize your limitations and, when the situation calls for it, refer a subordinate to a person or agency more qualified to help.

C-25. These agencies Figure C-3 lists can help you and your people resolve problems. Although it's generally in an individual's best interest to

seek help first from their first-line leaders, leaders must always respect an individual's right to contact most of these agencies on their own.

Activity	Description
Adjutant General	Provides personnel and administrative services support such as orders, ID cards, retirement assistance, deferments, and in- and out-processing.
American Red Cross	Provides communications support between soldiers and families and assistance during or after emergency or compassionate situations.
Army Community Service	Assists military families through their information and referral services, budget and indebtedness counseling, household item loan closet, information on other military posts, and welcome packets for new arrivals.
Army Substance Abuse Program	Provides alcohol and drug abuse prevention and control programs for DA civilians.
Better Opportunities for Single Soldiers (BOSS)	Serves as a liaison between upper levels of command on the installation and single soldiers.
Army Education Center	Provides services for continuing education and individual learning services support.
Army Emergency Relief	Provides financial assistance and personal budget counseling; coordinates student loans through Army Emergency Relief education loan programs.
Career Counselor	Explains reenlistment options and provides current information on prerequisites for reenlistment and selective

	reenlistment bonuses.
Chaplain	Provides spiritual and humanitarian counseling to soldiers and DA civilians.
Claims Section, SJA	Handles claims for and against the government, most often those for the loss and damage of household goods.
Legal Assistance Office	Provides legal information or assistance on matters of contracts, citizenship, adoption, marital problems, taxes, wills, and powers of attorney.
Community Counseling Center	Provides alcohol and drug abuse prevention and control programs for soldiers.
Community Health Nurse	Provides preventive health care services.
Community Mental Health Service	Provides assistance and counseling for mental health problems.
Employee Assistance Program	Provides health nurse, mental health service, and social work services for DA civilians.
Equal Opportunity Staff office and Equal Employment Opportunity Office	Provides assistance for matters involving discrimination in race, color, national origin, gender, and religion. Provides, information on procedures for initiating complaints and resolving complaints informally.
Family Advocacy Officer	Coordinates programs supporting children and families including abuse and neglect investigation, counseling, and

	educational programs.
Finance and Accounting Office	Handles inquiries for pay, allowances, and allotments.
Housing Referral Office	Provides assistance with housing on and off post.
Inspector General	Renders assistance to soldiers and DA civilians. Corrects injustices affecting individuals and eliminates conditions determined to be detrimental to the efficiency, economy, morale, and reputation of the Army. Investigates matters involving fraud, waste, and abuse.
Social Work Office	Provides services dealing with social problems to include crisis intervention, family therapy, marital counseling, and parent or child management assistance.
Transition Office	Provides assistance and information on separation from the Army.

Figure C-3. Support Activities

TYPES OF DEVELOPMENTAL COUNSELING

C-26. You can often categorize developmental counseling based on the topic of the session. The two major categories of counseling are event-oriented and performance/professional growth.

EVENT-ORIENTED COUNSELING

C-27. Event-oriented counseling involves a specific event or situation. It may precede events, such as going to a promotion board or attending a school; or it may follow events, such as a noteworthy duty performance, a problem with performance or mission accomplishment, or a personal problem. Examples of event-oriented counseling include, but are not limited to—

- Specific instances of superior or substandard performance.
- Reception and integration counseling.

- Crisis counseling.
- Referral counseling.
- Promotion counseling.
- Separation counseling.

Counseling for Specific Instances

C-28. Sometimes counseling is tied to specific instances of superior or substandard duty performance. You tell your subordinate whether or not the performance met the standard and what the subordinate did right or wrong. The key to successful counseling for specific performance is to conduct it as close to the event as possible.

C-29. Many leaders focus counseling for specific instances on poor performance and miss, or at least fail to acknowledge, excellent performance. You should counsel subordinates for specific examples of superior as well as substandard duty performance. To measure your own performance and counseling emphasis, you can note how often you document counseling for superior versus substandard performance.

C-30. You should counsel subordinates who don't meet the standard. If the subordinate's performance is unsatisfactory because of a lack of knowledge or ability, you and the subordinate should develop a plan to improve the subordinate's skills. Corrective training may be required at times to ensure the subordinate knows and achieves the standard. Once the subordinate can achieve the standard, you should end the corrective training.

C-31. When counseling a subordinate for a specific performance, take the following actions:

- Tell the subordinate the purpose of the counseling, what was expected, and how the subordinate failed to meet the standard.
- Address the specific unacceptable behavior or action, not the person's character.
- Tell the subordinate the effect of the behavior, action, or performance on the rest of the organization.
- Actively listen to the subordinate's response.
- Remain unemotional.
- Teach the subordinate how to meet the standard.
- Be prepared to do some personal counseling, since a failure to meet the standard may be related to or the result of an unresolved personal problem.
- Explain to the subordinate what will be done to improve performance (plan of action). Identify your responsibilities in implementing the plan of action; continue to assess and follow up on the subordinate's progress. Adjust plan of action as necessary.

Reception and Integration Counseling

C-32. As the leader, you must counsel new team members when they arrive at your organization. This reception and integration counseling serves two purposes. First, it identifies and helps fix any problems or concerns that new members may have, especially any issues resulting from the new duty assignment. Second, it lets them know the organizational standards and how they fit into the team. It clarifies job titles and sends the message that the chain of command cares. Reception and integration counseling should begin immediately upon arrival so new team members can quickly become integrated into the organization. (Figure C-4 gives some possible discussion points.)

- Organizational standards.
- Chain of command.
- NCO support channel (who and how used).
- On-and-off duty conduct.
- Personnel/personal affairs/initial clothing issue.
- Organizational history, organization, and mission.
- Soldier programs within the organization, such as soldier of the month/quarter/year and Audie Murphy.
- Off limits and danger areas.
- Functions and locations of support activities (see Figure C-3).
- On- and off-post recreational, educational, cultural, and historical opportunities.
- Foreign nation or host nation orientation.
- Other areas the individual should be aware of, as determined by the leader.

Figure C-4. Reception and Integration Counseling Points

Crisis Counseling

C-33. You may conduct crisis counseling to get a subordinate through the initial shock after receiving negative news, such as notification of the death of a loved one. You may assist the subordinate by listening and, as appropriate, providing assistance. Assistance may include referring the subordinate to a support activity or coordinating external agency support. Crisis counseling focuses on the subordinate's immediate, short-term needs.

Referral Counseling

C-34. Referral counseling helps subordinates work through a personal situation and may or may not follow crisis counseling. Referral counseling may also act as preventative counseling before the situation becomes a problem. Usually, the leader assists the subordinate in identifying the problem and refers the subordinate to the appropriate resource, such as Army Community Services, a chaplain, or an alcohol and drug counselor. (Figure C-3 lists support activities.)

Promotion Counseling

C-35. Leaders must conduct promotion counseling for all specialists and sergeants who are eligible for advancement without waivers but not recommended for promotion to the next higher grade. Army regulations require that soldiers within this category receive initial (event-oriented) counseling when they attain full eligibility and then periodic (performance/personal growth) counseling thereafter.

Adverse Separation Counseling

C-36. Adverse separation counseling may involve informing the soldier of the administrative actions available to the commander in the event substandard performance continues and of the consequences associated with those administrative actions (see AR 635-200).

C-37. Developmental counseling may not apply when an individual has engaged in more serious acts of misconduct. In those situations, you should refer the matter to the commander and the servicing staff judge advocate. When the leader's rehabilitative efforts fail, counseling with a view towards separation fills an administrative prerequisite to many administrative discharges and serves as a final warning to the soldier to improve performance or face discharge. In many situations, it may be beneficial to involve the chain of command as soon as you determine that adverse separation counseling might be required. A unit first sergeant or commander should be the person who informs the soldier of the notification requirements outlined in AR 635-200.

PERFORMANCE AND PROFESSIONAL GROWTH COUNSELING

Performance Counseling

C-38. During performance counseling, you conduct a review of a subordinate's duty performance during a certain period. You and the subordinate jointly establish performance objectives and standards for the next period. Rather than dwelling on the past, you should focus the session on the subordinate's strengths, areas needing improvement, and potential.

C-39. Performance counseling is required under the officer, NCO, and DA civilian evaluation reporting systems. The OER process requires periodic performance counseling as part of the OER Support Form requirements. Mandatory, face-to-face performance counseling between the rater and the rated NCO is required under the NCOERS. TAPES includes a combination of both of these requirements.

C-40. Counseling at the beginning of and during the evaluation period facilitates a subordinate's involvement in the evaluation process. Performance counseling communicates standards and is an opportunity for leaders to establish and clarify the expected values, attributes, skills,

and actions. Part IVb (Leader Attributes/Skills/Actions) of the OER Support Form (DA Form 67-9-1) serves as an excellent tool for leaders doing performance counseling. For lieutenants and warrant officers one, the major performance objectives on the OER Support Form are used as the basis for determining the developmental tasks on the Junior Officer Developmental Support Form (DA Form 67-9-1a). Quarterly face-to-face performance and developmental counseling is required for these junior officers as outlined in AR 623-105.

C-41. As an Army leader, you must ensure you've tied your expectations to performance objectives and appropriate standards. You must establish standards that your subordinates can work towards and must teach them how to achieve the standards if they are to develop.

Professional Growth Counseling

C-42. Professional growth counseling includes planning for the accomplishment of individual and professional goals. You conduct this counseling to assist subordinates in achieving organizational and individual goals. During the counseling, you and your subordinate conduct a review to identify and discuss the subordinate's strengths and weaknesses and create a plan of action to build upon strengths and overcome weaknesses. This counseling isn't normally event-driven.

C-43. As part of professional growth counseling, you may choose to discuss and develop a "pathway to success" with the subordinate. This future-oriented counseling establishes short- and long-term goals and objectives. The discussion may include opportunities for civilian or military schooling, future duty assignments, special programs, and reenlistment options. Every person's needs are different, and leaders must apply specific courses of action tailored to each individual.

C-44. Career field counseling is required for lieutenants and captains before they're considered for promotion to major. Raters and senior raters, in conjunction with the rated officer, need to determine where the officer's skills best fit the needs of the Army. During career field counseling, consideration must be given to the rated officer's preference and his abilities (both performance and academic). The rater and senior rater should discuss career field designation with the officer prior to making a recommendation on the rated officer's OER.

C-45. While these categories can help you organize and focus counseling sessions, they should not be viewed as separate, distinct, or exhaustive. For example, a counseling session that focuses on resolving a problem may also address improving duty performance. A session focused on performance may also include a discussion on opportunities for

professional growth. Regardless of the topic of the counseling session, leaders should follow the same basic format to prepare for and conduct it.

APPROACHES TO COUNSELING

C-46. An effective leader approaches each subordinate as an individual. Different people and different situations require different counseling approaches. Three approaches to counseling include nondirective, directive, and combined. These approaches differ in the techniques used, but they all fit the definition of counseling and contribute to its overall purpose. The major difference between the approaches is the degree to which the subordinate participates and interacts during a counseling session. Figure C-5 summarizes the advantages and disadvantages of each approach.

NONDIRECTIVE

C-47. The nondirective approach is preferred for most counseling sessions. Leaders use their experienced insight and judgment to assist subordinates in developing solutions. You should partially structure this type of counseling by telling the subordinate about the counseling process and explaining what you expect.

C-48. During the counseling session, listen rather than make decisions or give advice. Clarify what's said. Cause the subordinate to bring out important points, so as to better understand the situation. When appropriate, summarize the discussion. Avoid providing solutions or rendering opinions; instead, maintain a focus on individual and organizational goals and objectives. Ensure the subordinate's plan of action supports those goals and objectives.

DIRECTIVE

C-49. The directive approach works best to correct simple problems, make on-the-spot corrections, and correct aspects of duty performance. The leader using the directive style does most of the talking and tells the subordinate what to do and when to do it. In contrast to the nondirective approach, the leader directs a course of action for the subordinate.
C-50. Choose this approach when time is short, when you alone know what to do, or if a subordinate has limited problem-solving skills. It's also appropriate when a subordinate needs guidance, is immature, or is insecure.

COMBINED

C-51. In the combined approach, the leader uses techniques from both the directive and nondirective approaches, adjusting them to articulate what's best for the subordinate. The combined approach emphasizes the subordinate's planning and decision-making responsibilities.

C-52. With your assistance, the subordinate develops the subordinate's own plan of action. You should listen, suggest possible courses, and help analyze each possible solution to determine its good and bad points. You should then help the subordinate fully understand all aspects of the situation and encourage the subordinate to decide which solution is best.

	Advantages	Disadvantages
Nondirective	• Encourages maturity. • Encourages open communication. • Develops personal responsibility.	• More time-consuming • Requires greatest counselor skill.
Directive	• Quickest method. • Good for people who need clear, concise direction. • Allows counselors to actively use their experience.	• Doesn't encourage subordinates to be part of the solution. • Tends to treat symptoms, not problems. • Tends to discourage subordinates from talking freely. • Solution is the counselor's, not the subordinate's.
Combined	• Moderately quick. • Encourages maturity. • Encourages open communication. • Allows counselors to actively use their experience.	• May take too much time for some situations.

Figure C-5. Counseling Approach Summary Chart

COUNSELING TECHNIQUES

C-53. As an Army leader, you may select from a variety of techniques when counseling subordinates. These counseling techniques, when appropriately used, cause subordinates to do things or improve upon their performance. You can use these methods during scheduled counseling sessions or while simply coaching a subordinate. Counseling techniques you can use during the nondirective or combined approaches include—

- **Suggesting alternatives.** Discuss alternative actions that the subordinate may take, but both you and the subordinate decide which course of action is most appropriate.
- **Recommending.** Recommend one course of action, but leave the decision to accept the recommended action to the subordinate.
- **Persuading.** Persuade the subordinate that a given course of action is best, but leave the decision to the subordinate. Successful persuasion depends on the leader's credibility, the subordinate's willingness to listen, and their mutual trust.
- **Advising.** Advise the subordinate that a given course of action is best. This is the strongest form of influence not involving a command.

C-54. Some techniques you can use during the directive approach to counseling include—

- **Corrective training.** Teach and assist the subordinate in attaining and maintaining the standards. The subordinate completes corrective training when the subordinate attains the standard.
- **Commanding.** Order the subordinate to take a given course of action in clear, exact words. The subordinate understands that he has been given a command and will face the consequences for failing to carry it out.

THE COUNSELING PROCESS

C-55. Effective leaders use the counseling process. It consists of four stages:

- Identify the need for counseling.
- Prepare for counseling.
- Conduct counseling.
- Follow up.

IDENTIFY THE NEED FOR COUNSELING

C-56. Quite often organizational policies, such as counseling associated with an evaluation or counseling required by the command, focus a counseling session. However, you may conduct developmental counseling whenever the need arises for focused, two-way communication aimed at subordinate development. Developing subordinates consists of observing the subordinate's performance, comparing it to the standard, and then providing feedback to the subordinate in the form of counseling.

PREPARE FOR COUNSELING

C-57. Successful counseling requires preparation. To prepare for counseling, do the following:

- Select a suitable place.
- Schedule the time.
- Notify the subordinate well in advance.
- Organize information.
- Outline the counseling session components.
- Plan your counseling strategy.
- Establish the right atmosphere.

Select a Suitable Place

C-58. Schedule counseling in an environment that minimizes interruptions and is free from distracting sights and sounds.

Schedule the Time

C-59. When possible, counsel a subordinate during the duty day. Counseling after duty hours may be rushed or perceived as unfavorable. The length of time required for counseling depends on the complexity of the issue. Generally a counseling session should last less than an hour. If you need more time, schedule a second session. Additionally, select a time free from competition with other activities and consider what has been planned after the counseling session. Important events can distract a subordinate from concentrating on the counseling.

Notify the Subordinate Well in Advance

C-60. For a counseling session to be a subordinate-centered, two-person effort, the subordinate must have time to prepare for it. The subordinate should know why, where, and when the counseling will take place. Counseling following a specific event should happen as close to the event as possible. However, for performance or professional development counseling, subordinates may need a week or more to prepare or review specific products, such as support forms or counseling records.

Organize Information

C-61. Solid preparation is essential to effective counseling. Review all pertinent information. This includes the purpose of the counseling, facts and observations about the subordinate, identification of possible problems, main points of discussion, and the development of a plan of action. Focus on specific and objective behaviors that the subordinate must maintain or improve as well as a plan of action with clear, obtainable goals.

Outline the Components of the Counseling Session

C-62. Using the information obtained, determine what to discuss during the counseling session. Note what prompted the counseling, what you aim to achieve, and what your role as a counselor is. Identify possible comments or questions to help you keep the counseling session subordinate-centered and help the subordinate progress through its

stages. Although you never know what a subordinate will say or do during counseling, a written outline helps organize the session and enhances the chance of positive results. (Figure C-6 is one example of a counseling outline prepared by a platoon leader about to conduct an initial NCOER counseling session with a platoon sergeant.)

Type of counseling: Initial NCOER counseling for SFC Taylor, a recently promoted new arrival to the unit.

Place and time: The platoon office, 1500 hours, 9 October.

Time to notify the subordinate: Notify SFC Taylor one week in advance of the scheduled counseling session.

Subordinate preparation: Have SFC Taylor put together a list of goals and objectives he would like to complete over the next 90 to 180 days. Review the values, attributes, skills, and actions from FM 22-100.

Counselor preparation:

- Review the NCO Counseling Checklist/Record (DA Form 2166-8-1).
- Update or review SFC Taylor's duty description and fill out the rating chain and duty description on the working copy of the NCOER (DA Form 2166-8, Parts II and III).
- Review each of the values and responsibilities in Part IV of the NCOER and the values, attributes, skills and actions in FM 22-100. Think of how each applies to SFC Taylor and the platoon sergeant position.
- Review the actions you consider necessary for a success or excellence in each value and responsibility.
- Make notes in blank spaces in Part IV of the NCOER to assist when counseling.

Role as counselor: Help SFC Taylor to understand the expectations and standards associated with the platoon sergeant position. Assist SFC Taylor in developing the values, attributes, skills, and actions that will enable him to achieve his performance objectives, consistent with those of the platoon and company. Resolve any aspects of the job that aren't clearly understood.

Session outline: Complete an outline following the counseling session components in Figure C-7 and based on the draft duty description on the NCOER, ideally at least two

to three days prior to the actual counseling session.

Figure C-6. Example of a Counseling Outline

Plan Counseling Strategy

C-63. As many approaches to counseling exist as there are leaders. The directive, nondirective, and combined approaches to counseling were addressed earlier. Use a strategy that suits your subordinates and the situation.

Establish the Right Atmosphere

C-64. The right atmosphere promotes two-way communication between a leader and subordinate. To establish a relaxed atmosphere, you may offer the subordinate a seat or a cup of coffee. You may want to sit in a chair facing the subordinate since a desk can act as a barrier.

C-65. Some situations make an informal atmosphere inappropriate. For example, during counseling to correct substandard performance, you may direct the subordinate to remain standing while you remain seated behind a desk. This formal atmosphere, normally used to give specific guidance, reinforces the leader's rank, position in the chain of command, and authority.

CONDUCT THE COUNSELING SESSION

C-66. Be flexible when conducting a counseling session. Often counseling for a specific incident occurs spontaneously as leaders encounter subordinates in their daily activities. Such counseling can occur in the field, motor pool, barracks—wherever subordinates perform their duties. Good leaders take advantage of naturally occurring events to provide subordinates with feedback.

C-67. Even when you haven't prepared for formal counseling, you should address the four basic components of a counseling session. Their purpose is to guide effective counseling rather than mandate a series of rigid steps. Counseling sessions consist of—

- Opening the session.
- Discussing the issues.
- Developing the plan of action.
- Recording and closing the session.

Ideally, a counseling session results in a subordinate's commitment to a plan of action. Assessment of the plan of action (discussed below) becomes the starting point for follow-up counseling. (Figure C-7 is an example of a counseling session.)

Open the Session

C-68. In the session opening, state the purpose of the session and establish a subordinate-centered setting. Establish the preferred setting early in the session by inviting the subordinate to speak. The best way to open a counseling session is to clearly state its purpose. For example, an appropriate purpose statement might be: "The purpose of this counseling is to discuss your duty performance over the past month and to create a plan to enhance performance and attain performance goals." If applicable, start the counseling session by reviewing the status of the previous plan of action.

C-69. You and the subordinate should attempt to develop a mutual understanding of the issues. You can best develop this by letting the subordinate do most of the talking. Use active listening; respond, and question without dominating the conversation. Aim to help the subordinate better understand the subject of the counseling, for example, duty performance, a problem situation and its impact, or potential areas for growth.

C-70. Both you and the subordinate should provide examples or cite specific observations to reduce the perception that either is unnecessarily biased or judgmental. However, when the issue is substandard performance, you should make clear how the performance didn't meet the standard. The conversation, which should be two-way, then addresses what the subordinate needs to do to meet the standard. It's important that you define the issue as substandard performance and don't allow the subordinate to define the issue as an unreasonable standard—unless you consider the standard negotiable or are willing to alter the conditions under which the subordinate must meet the standard.

Develop a Plan of Action

C-71. A plan of action identifies a method for achieving a desired result. It specifies what the subordinate must do to reach the goals set during the counseling session. The plan of action must be specific: it should show the subordinate how to modify or maintain his behavior. It should avoid vague intentions such as "Next month I want you to improve your land navigation skills." The plan must use concrete and direct terms. For example, you might say: "Next week you'll attend the map reading class with 1st Platoon. After the class, SGT Dixon will coach you through the land navigation course. He will help you develop your skill with the compass. I will observe you going through the course with SGT Dixon, and then I will talk to you again and determine where and if you still need additional training." A specific and achievable plan of action sets the stage for successful development.

Record and Close the Session

C-72. Although requirements to record counseling sessions vary, a leader always benefits by documenting the main points of a counseling session. Documentation serves as a reference to the agreed upon plan of action and the subordinate's accomplishments, improvements, personal preferences, or problems. A complete record of counseling aids in making recommendations for professional development, schools, promotions, and evaluation reports.

C-73. Additionally, Army regulations require written records of counseling for certain personnel actions, such as a barring a soldier from reenlisting, processing a soldier for administrative separation, or placing a soldier in the overweight program. When a soldier faces involuntary separation, the leader must take special care to maintain accurate counseling records. Documentation of substandard actions conveys a strong corrective message to subordinates.

C-74. To close the session, summarize its key points and ask if the subordinate understands the plan of action. Invite the subordinate to review the plan of action and what's expected of you, the leader. With the subordinate, establish any follow-up measures necessary to support the successful implementation of the plan of action. These may include providing the subordinate with resources and time, periodically assessing the plan, and following through on referrals. Schedule any future meetings, at least tentatively, before dismissing the subordinate.

FOLLOW UP

Leader's Responsibilities

C-75. The counseling process doesn't end with the counseling session. It continues through implementation of the plan of action and evaluation of results. After counseling, you must support subordinates as they implement their plans of action. Support may include teaching, coaching, or providing time and resources. You must observe and assess this process and possibly modify the plan to meet its goals. Appropriate measures after counseling include follow-up counseling, making referrals, informing the chain of command, and taking corrective measures.

Assess the Plan of Action

C-76. The purpose of counseling is to develop subordinates who are better able to achieve personal, professional, and organizational goals. During the assessment, review the plan of action with the subordinate to determine if the desired results were achieved. You and the subordinate should determine the date for this assessment during the initial counseling session. The assessment of the plan of action provides useful information for future follow-up counseling sessions.

Open the Session

- Establish a relaxed environment. Explain to SFC Taylor that the more one discusses and understands Army values and leader attributes, skills, and actions, the easier it is to develop and incorporate them into an individual leadership style.
- State the purpose of the counseling session. Explain that the initial counseling is based on leader actions (what SFC Taylor needs to do to be a successful platoon sergeant) and not on professional developmental needs (what SFC Taylor needs to do to develop further as an NCO).
- Come to an agreement on the duty description, the meaning of each value and responsibility, and the standards for success and excellence for each value and responsibility. Explain that subsequent counseling will focus on SFC Taylor's developmental needs as well as how well SFC Taylor is meeting the jointly agreed upon performance objectives. Instruct SFC Taylor to perform a self-assessment during the next quarter to identify his developmental needs.
- Ensure SFC Taylor knows the rating chain. Resolve any questions that SFC Taylor has about the job. Discuss the team relationship that exists between a platoon leader and a platoon sergeant and the importance of two-way communication between them.

Discuss the issue

- Jointly review the duty description on the NCOER, including the maintenance, training, and taking care of soldiers' responsibilities. Mention that the duty description can be revised as necessary. Highlight areas of special emphasis and appointed duties.
- Discuss the meaning of each value and responsibility on the NCOER. Discuss the values, attributes, skills, and actions outlined in FM 22-100. Ask open-ended questions to see if SFC Taylor can relate these items to his role as a platoon sergeant.
- Explain that even though the developmental tasks focus on developing leader actions, character development forms the basis for leadership development. Character and actions can't be viewed as separate; they're closely linked. In formulating the plan of action to accomplish major performance objectives, the proper values, attributes, and skills form the basis for the plan. As such, character development must be incorporated into the plan of action.

Assist in Developing a Plan of Action (During the Counseling Session)

- Ask SFC Taylor to identify actions that will facilitate the accomplishment of the major performance objectives. Categorize each action into one of the values or responsibilities listed on the NCOER.

- Discuss how each value and responsibility applies to the platoon sergeant position. Discuss specific examples of success and excellence in each value and responsibility block. Ask SFC Taylor for suggestions to make the goals more objective, specific, and measurable.
- Ensure that SFC Taylor has at least one example of a success or excellence bullet listed under each value and responsibility.
- Discuss SFC Taylor's promotion goals and ask him what he considers to be his strengths and weaknesses. Obtain copies of the last two master sergeant selection board results and match his goals and objectives to these.

Close the Session

- Check SFC Taylor's understanding of the duty description and performance objectives.
- Stress the importance of teamwork and two-way communication.
- Ensure SFC Taylor understands that you expect him to assist in your development as a platoon leader. This means that both of you have the role of teacher and coach.
- Remind SFC Taylor to perform a self-assessment during the next quarter.
- Set a tentative date during the next quarter for the routinely scheduled follow-up counseling.

Notes on Strategy

- Facilitate answering any questions SFC Taylor may have.
- Expect SFC Taylor to be uncomfortable with the terms and the developmental process; respond in a way that encourages participation throughout the session.

Figure C-7. Example of a Counseling Session

SUMMARY

C-77. This appendix has discussed developmental counseling. Developmental counseling is subordinate-centered communication that outlines actions necessary for subordinates to achieve individual and organizational goals and objectives. It can be either event-oriented or focused on personal and professional development. Figure C-8 summarizes the major aspects of developmental counseling and the counseling process.

Leaders must demonstrate these qualities to counsel effectively:	The Counseling Process 1. **Identify the need for counseling.**

• Respect for subordinates. • Self and cultural awareness. • Credibility. • Empathy. **Leaders must possess these counseling skills:** • Active listening. • Responding. • Questioning. **Effective leaders avoid common counseling mistakes. Leaders should avoid the influence of—** • Personal bias. • Rash judgments. • Stereotyping. • Losing emotional control. • Inflexible counseling methods. • Improper follow-up.	2. **Prepare for counseling.** • Select a suitable place. • Schedule the time. • Notify the subordinate well in advance. • Organize information. • Outline the components of the counseling session. • Plan counseling strategy. • Establish the right atmosphere. 3. **Conduct the counseling session.** • Open the session. • Discuss the issue. • Develop a plan of action (to include the leader's responsibilities). • Record and close the session. 4. **Follow up.** • Support plan of action implementation • Assess the plan of action.

Figure C-8. A Summary of Developmental Counseling

THE DEVELOPMENTAL COUNSELING FORM

C-78. The Developmental Counseling Form (DA Form 4856-E) is designed to help Army leaders conduct and record counseling sessions. Figure C-9 shows a completed DA Form 4856-E documenting the counseling of a young soldier with financial problems. While this is an example of a derogatory counseling, you can see that it is still developmental. Leaders must decide when counseling, additional training, rehabilitation, reassignment, or other developmental options have been exhausted. If the purpose of a counseling session is not developmental, refer to paragraphs C-36 and C-37. Figure C-10 shows a routine performance/professional growth counseling for a unit first sergeant. Figure C-11 shows a blank form with instructions on how to complete each block.

DEVELOPMENTAL COUNSELING FORM
For use of this form see FM 22-100

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)
PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
DISCLOSURE: Disclosure is voluntary.

PART I - ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank / Grade	Social Security No.	Date of Counseling
Lloyd, Andrew	*PFC*	*123-45-6789*	*28 March 1997*

Organization	Name and Title of Counselor
2nd Platoon, B Battery, 1 - 1 ADA Bn	*SGT Mark Levy, Squad Leader*

PART II - BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g. performance/professional or event-oriented counseling and includes the leader's facts and observations prior to the counseling):

The purpose of this counseling is to inform PFC Lloyd of his responsibility to manage his financial affairs and the potential consequences of poorly managing finances and to help PFC Lloyd develop a plan of action to resolve his financial problems.

Facts: The battery commander received notice of delinquent payment on PFC Lloyd's Deferred Payment Plan (DPP).

A payment of $86.00 is 45 days delinquent

PART III - SUMMARY OF COUNSELING
Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

PFC Lloyd, late payments on a DPP account reflect a lack of responsibility and poor managing of finances. You should know that the letter of lateness has been brought to the attention of the battery commander, the first sergeant, and the platoon sergeant. They're all questioning your ability to manage your personal affairs. I also remind you that promotions and awards are based more than on just performing MOS-related duties; soldiers must act professionally and responsibly in all areas. Per conversation with PFC Lloyd, the following information was obtained:

He didn't make the DPP payment due to a lack of funds in his checking account. His most recent long distance phone bill was over $220 due to calling his house concerning his grandmother's failing health. PFC Lloyd stated that he wanted to pay for the phone calls himself in order not to burden his parents with the expense of collect calls. He also stated that his calling had tapered down considerably and he expects this month's phone bill to be approximately $50. We made an appointment at ACS and ACS came up with the following information:

PFC Lloyd's monthly obligations: Car payment: $330
Car insurance: $138
Rent including utilities: $400
Other credit cards: $0
Total monthly obligations: $868.00
Monthly take-home pay: $1232.63

We discussed that with approximately $364 available for monthly living expenses, a phone bill in excess of $200 will severely affect PFC Lloyd's financial stability and can't continue. We discussed the need for PFC Lloyd to establish a savings account to help cover emergency expenses. PFC Lloyd agreed that his expensive phone bill and his inability to make the DPP payment is not responsible behavior. He confirmed that he wants to get his finances back on track and begin building a savings account.

OTHER INSTRUCTIONS
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or retirement. For separation requirements and notification of loss of benefits/consequences, see local directives and AR 635-200.

DA FORM 4856-E, JUN 99 EDITION OF JUN 85 IS OBSOLETE

Figure C-9. Example of a Developmental Counseling Form—Event Counseling

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goals(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specific time line for implementation and assessment (Part IV below)).

Based on our discussion, PFC Lloyd will be able to resume normal payment on his DPP account next month (assuming that his phone bill is approximately $50). PFC Lloyd agreed to contact the DPP office and provide a partial payment of $20 immediately. He agreed to exercise self-restraint and not make long distance calls as frequently. He decided that his goal is to make one ten-minute phone call every two weeks. He will write letters to express concern over his grandmother's condition and ask his parents to do the same to keep him informed. His long-term goal is to establish a savings account with a goal of contributing $50 a month.

PFC Lloyd also agreed to attend the check cashing class at ACS on 2, 9, and 16 April.

Assessment date: 27 June

Session Closing: (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate).

Individual counseled: I agree/~~disagree~~ with the information above

Individual counseled remarks:

Signature of Individual Counseled: *Andrew Lloyd* Date: *28 March 1997*

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

PFC Lloyd will visit the DPP office to make an immediate partial payment of $20 and will give me a copy of the receipt as soon as the payment is made. PFC Lloyd will also provide me with a copy of the next month's phone bill and DPP payment receipt.
PFC Lloyd's finances will be a key topic of discussion at his next monthly counseling session.

Signature of Counselor: *Mark Levy* Date: *28 March 1997*

PART IV - ASSESSMENT OF THE PLAN OF ACTION

Assessment (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling):

Counselor: _____ Individual Counseled: _____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DA FORM 4856-E (Reverse)

Figure C-9. Example of a Developmental Counseling Form—Event Counseling (Reverse)

DEVELOPMENTAL COUNSELING FORM
For use of this form see FM 22-100

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)
PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
DISCLOSURE: Disclosure is voluntary.

PART I - ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank / Grade	Social Security No.	Date of Counseling
McDonald, Stephen	*1SG*	*333-33-3333*	*13 March 1998*

Organization	Name and Title of Counselor
D Company, 3–95th IN	*CPT Peterson, Company Commander*

PART II - BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g. performance/professional or event-oriented counseling and includes the leader's facts and observations prior to the counseling):

- *To discuss duty performance for the period 19 Dec 97 to 11 March 1998.*
- *To discuss short-range professional growth goals/plan for next year.*
- *Talk about long-range professional growth (2-5 years) goals.*

PART III - SUMMARY OF COUNSELING
Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

- *Performance (sustain):*
- *Emphasized safety and knowledge of demolition, tactical proficiency on the Platoon Live Fire Exercises.*
- *Took charge of company defense during the last major field training exercise; outstanding integration and use of engineer, heavy weapons, and air defense artillery assets. Superb execution of defense preparations and execution.*
- *No dropped white cycle taskings.*
- *Good job coordinating with battalion adjutant on legal and personnel issues.*
- *Continue to take care of soldiers, keep the commander abreast of problems.*
- *Focused on subordinate NCO development; right man for the right job.*

Improve:

- *Get NCODPs on the calendar.*
- *Hold NCOs to standard on sergeants time training.*

OTHER INSTRUCTIONS
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

DA FORM 4856-E, JUN 99 EDITION OF JUN 85 IS OBSOLETE

Figure C-10. Example of a Developmental Counseling Form—Performance/Professional Growth Counseling

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goals(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specific time line for implementation and assessment (Part IV below)).

- *Developmental Plan (next year):*
- *Develop a yearlong plan for NCODPs; coordinate to place on the calendar and training schedules.*
- *Resume civilian education; correspondence courses.*
- *Develop a company soldier of the month competition.*
- *Assist the company XO in modularizing the supply room for quick, efficient load-outs.*
- *Put in place a program to develop Ranger School candidates.*

Long-range goals (2 to 5 years):

- *Earn bachelor's degree.*
- *Attend and graduate the Sergeant Majors Academy.*

Session Closing: (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate).

Individual counseled: I agree/~~disagree~~ with the information above

Individual counseled remarks:

Signature of Individual Counseled: 1SG McDonald Date: *13 March 1998*

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

- *Coordinate with the 1SG on scheduling of NCODPs and soldier of the month boards.*
- *Have the XO meet with the 1SG on developing a plan for modularizing and improving the supply room.*
- *Provide time for Ranger candidate program.*

Signature of Counselor: *Mark Levy* Date: *28 March 1997*

PART IV - ASSESSMENT OF THE PLAN OF ACTION

Assessment (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling):

1SG McDonald has enrolled in an associates degree program at the University of Kentucky. The supply room received all green evaluations during the last command inspection. Five of seven Ranger applicants successfully completed Ranger School, exceeding the overall course completion rate of 39%. Monthly soldier of the month boards proved to be impractical because of the OPTEMPO; however, the company does now hold quarterly boards during the white cycle. Brigade command sergeant major commented favorably on the last company NCODP he attended and gave the instructor a brigade coin.

Counselor: *CPT Peterson* Individual Counseled: *1SG McDonald* Date of Assessment: *1 Aug 98*

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DA FORM 4856-E (Reverse)

Figure C-10. Example of a Developmental Counseling Form—Performance/Professional Growth Counseling (Reverse)

DEVELOPMENTAL COUNSELING FORM
For use of this form see FM 22-100

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)
PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
DISCLOSURE: Disclosure is voluntary.

PART I - ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank / Grade	Social Security No.	Date of Counseling
Organization		Name and Title of Counselor	

PART II - BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g. performance/professional or event-oriented counseling and includes the leader's facts and observations prior to the counseling):

See paragraph C-68, Open the Session

The leader should annotate pertinent, specific, and objective facts and observations made. If applicable, the leader and subordinate start the counseling session by reviewing the status of the previous plan of action.

PART III - SUMMARY OF COUNSELING
Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

See paragraphs C-69 and C-70, Discuss the Issues.

The leader and subordinate should attempt to develop a mutual understanding of the issues. Both the leader and the subordinate should provide examples or cite specific observations to reduce the perception that either is unnecessarily biased or judgmental.

OTHER INSTRUCTIONS
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

DA FORM 4856-E, JUN 99 EDITION OF JUN 85 IS OBSOLETE

Figure C-11. Guidelines on Completing a Developmental Counseling Form

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goals(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specific time line for implementation and assessment (Part IV below)).

See paragraph C-71, Develop a Plan of Action

The plan of action specifies what the subordinate must do to reach the goals set during the counseling session. The plan of action must be specific and should contain the outline, guideline(s), and time line that the subordinate follows. A specific and achievable plan of action sets the stage for successful subordinate development.

Remember, event-oriented counseling with corrective training as part of the plan of action can't be tied to a specified time frame. Corrective training is complete once the subordinate attains the standard.

Session Closing: (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate).

Individual counseled: I agree/ disagree with the information above

Individual counseled remarks:

See paragraph C-72 through C-74, Close the Session

Signature of Individual Counseled:_____ Date: _____

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

See paragraph C76, Leader's Responsibilities

To accomplish the plan of action, the leader must list the resources necessary and commit to providing them to the soldier.

Signature of Counselor: _____ Date:_____

PART IV - ASSESSMENT OF THE PLAN OF ACTION

Assessment (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling):

The assessment of the plan of action provides useful information for future follow-up counseling. This block should be completed prior to the start of a follow-up counseling session. During an event-oriented counseling session, the counseling session is not complete until this block is completed.

During performance/professional growth counseling, this block serves as the starting point for future counseling sessions. Leaders must remember to conduct this assessment based on resolution of the situation or the established time line discussed in the plan of action block above.

Counselor:_____ Individual Counseled:_____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DA FORM 4856-E (Reverse)

Figure C-11. Guidelines on Completing a Developmental Counseling Form (Reverse)

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Standard 15 Reference Excerpts

TR 350-6, para 3-18, Initial Entry Training soldier leaders.

a. Initial entry soldiers may serve as squad, crew, group, or section leaders and platoon guides during any or all phases of IET. Soldiers appointed as IET soldier leaders will be taught the functions, duties, and responsibilities of their positions prior to assuming those duties.

(1) Initial entry soldiers are authorized to wear brassards indicating rank (corporal for squad, crew, group, or section leaders; sergeant for assistant platoon sergeants) as outlined in AR 670-1. They are not to be considered as NCOs, nor accorded the privileges of NCOs.

(2) Initial entry soldiers for reclassification training, or who have prior service, may be appointed to leadership positions identified above.

(a) Reclassified and prior-service soldiers in the grades private through specialist are authorized to hold IET soldier leader positions, but are not to be considered as NCOs. Privileges will be IAW paragraph 2-17c(6).

(b) Noncommissioned officers will wear their authorized rank, and be considered and treated as NCOs. Privileges will be IAW paragraph 2-17c(6).

b. Initial Entry Training soldier leaders will not be assigned responsibility for a mission or function that is normally the responsibility of a permanent party soldier. Initial entry training soldier leaders will be allowed to use their initiative, authority, and to assume responsibilities commensurate with their position, experience, and ability while under supervision of IET cadre.

c. Initial entry training soldier leaders will not be used as primary instructors during formal instruction. They may be used as assistant instructors, provided such duty or preparation does not keep them from scheduled instruction.

TR 350-10, paras 2-7(e)&(f), para 2-20.

2-7. Conduct of training. Commandants will ensure training is conducted and evaluated per the principles listed in Field Manual (FM) 25-100 in conjunction with FM 25-101 (Note: both manuals to be revised as new "3" series FM publications). Noncommissioned Officer Academy commandants will use the training schedule format outlined in FM 25-101.

a. Prior to enrollment, students must be fully capable of performing supporting individual tasks and the tasks required in the next lower level course. Commandants may evaluate student capabilities through appropriate testing, and if necessary, provide remedial training, recycle to a later class, or return to unit of assignment those students who do not meet course prerequisites or do not have the required minimum skills. Remedial training will be scheduled when applicable on the training schedule, but will not be conducted during normal POI time.

b. Schools will train tasks only at the skill level prescribed for each course.

c. Student training, SGL, SSGL and instructors.

(1) School staffs, faculties, SSGL, and training departments will supervise and support SGL, instructors, and students, and ensure commitment to training, educating, and developing each student.

(2) Trained, qualified, certified, and experienced SGL, SSGL, and instructors will conduct and supervise student training (SSGLs may be used as SGLs as the NCOA commandant deems necessary to accomplish the training mission or as temporary fill-ins when shortages of by-grade SGLs dictate the need to do so). Small group leader-to-student ratios will be sufficient to ensure student control and supervision and facilitate teaching, coaching, mentoring, and developing individual student leadership skills to the level for which training is provided. (See paragraph 2-13.)

(3) Small group leaders, SSGLs, and instructors will provide students with progressive and sequential training, accurate evaluations, and timely feedback via task performance after action reviews.

(4) When applicable, SGLs, SSGLs, and instructors will use mission orders to convey training objectives. Mission orders will clearly articulate the commander's intent. Small group leaders, SSGLs, and instructors will ensure students use mission orders to demonstrate a thorough understanding of the mission and the commander's intent.

d. Training environments must enhance learning, encourage student initiative, require students to attain and sustain high levels of discipline, have defined, publicized, and enforced standards, and focus on preparing the student to lead soldiers through training, maintenance, deployment, and sustained tactical operations in support of unit missions.

e. When possible, students will be given opportunities to gain experience by leading and/or training soldiers in other courses (for example, conduct marksmanship and physical fitness or CTT training for advanced individual training students).

f. Commandants will use proponent-developed end-of-course (Phase II) CPX, FTX, STX, or LTX, virtual or live, in the field or at a job site, as a culminating event designed to evaluate (Go/No-Go) the soldier's ability to perform the terminal learning objectives of the course to graduate. These events will be at least 72 hours in length, be scenario driven and conducted under CONOPS conditions. Leader development course proponents will publish minimum guidelines and evaluation criteria for exercise execution in the course management plan of each course they develop.

2-20. Leadership assessment and development. Schools will use FM 22-100 as a guide to implement a standard leadership assessment process to evaluate student leadership values, attributes, skills and actions (VASA). Information obtained from the process will be the basis for course leadership grades and AER. Minimum program requirements include—

a. Student assessments.

b. Counseling that includes identification of strengths, weaknesses, and developmental needs.

c. Assisting students in identifying courses of action to improve their performance.

FM 22-100, Apx B.

Performance Indicators

B-1. Appendix B is organized around the leadership dimensions that Chapters 1, 2, 3, 4, 5, 6, and 7 discuss and that Figure B-1 shows. This appendix lists indicators for you to use to assess the leadership of yourself and others based on these leadership dimensions. Use it as an assessment and counseling tool, not as a source of phrases for evaluation reports. When you prepare an evaluation, make comments that apply specifically to the individual you are evaluating. Do not limit yourself to the general indicators listed here. Be specific; be precise; be objective; be fair.

Leaders of character and competence . .			*act to achieve excellence by providing purpose, direction and motivation.*		
Values "Be"	Attributes "Be"	Skills[4] "Know"	Actions[5] "Do"		
Loyalty Duty Respect Selfless Service Honor Integrity Personal Courage	Mental[1] Physical[2] Emotional[3]	Interpersonal Conceptual Technical Tactical	Influencing Communicating Decision Making Motivating	Operating Planning/ Preparing Executing Assessing	Improving Developing Building Learning

[1] The mental attributes of an Army leader are will, self-discipline, initiative, judgment, self-confidence, intelligence, and cultural awareness.

[2] The physical attributes of an Army leader are health fitness, physical fitness, and military and professional bearing.

[3] The emotional attributes of an Army leader are self-control, balance, and stability.

[4] The interpersonal, conceptual, technical, and tactical skills are different for direct,

organizational, and strategic leaders.

[5] The influencing, operating, and improving actions are different for direct, organizational, and strategic leaders.

Figure B-1. Leadership Dimensions

VALUES

LOYALTY

B-2. Leaders who demonstrate loyalty—

- Bear true faith and allegiance in the correct order to the Constitution, the Army, and the organization.
- Observe higher headquarters' priorities.
- Work within the system without manipulating it for personal gain.

DUTY

B-3. Leaders who demonstrate devotion to duty—

- Fulfill obligations—professional, legal, and moral.
- Carry out mission requirements.
- Meet professional standards.
- Set the example.
- Comply with policies and directives.
- Continually pursue excellence.

RESPECT

B-4. Leaders who demonstrate respect—

- Treat people as they should be treated.
- Create a climate of fairness and equal opportunity.
- Are discreet and tactful when correcting or questioning others.
- Show concern for and make an effort to check on the safety and well-being of others.
- Are courteous.
- Don't take advantage of positions of authority.

SELFLESS SERVICE

B-5. Leaders who demonstrate selfless service—

- Put the welfare of the nation, the Army, and subordinates before their own.
- Sustain team morale.

- Share subordinates' hardships.
- Give credit for success to others and accept responsibility for failure themselves.

HONOR

B-6. Leaders who demonstrate honor—

- Live up to Army values.
- Don't lie, cheat, steal, or tolerate those actions by others.

INTEGRITY

B-7. Leaders who demonstrate integrity—

- Do what is right legally and morally.
- Possess high personal moral standards.
- Are honest in word and deed.
- Show consistently good moral judgment and behavior.
- Put being right ahead of being popular.

PERSONAL COURAGE

B-8. Leaders who demonstrate personal courage—

- Show physical and moral bravery.
- Take responsibility for decisions and actions.
- Accept responsibility for mistakes and shortcomings.

ATTRIBUTES

MENTAL ATTRIBUTES

B-9. Leaders who demonstrate desirable mental attributes—

- Possess and display will, self-discipline, initiative, judgment, self-confidence, intelligence, common sense, and cultural awareness.
- Think and act quickly and logically, even when there are no clear instructions or the plan falls apart.
- Analyze situations.
- Combine complex ideas to generate feasible courses of action.
- Balance resolve and flexibility.
- Show a desire to succeed; do not quit in the face of adversity.
- Do their fair share.
- Balance competing demands.
- Embrace and use the talents of all members to build team cohesion.

PHYSICAL ATTRIBUTES

B-10. Leaders who demonstrate desirable physical attributes—

- Maintain an appropriate level of physical fitness and military bearing.
- Present a neat and professional appearance.
- Meet established norms of personal hygiene, grooming, and cleanliness.
- Maintain Army height and weight standards (not applicable to DA civilians).
- Render appropriate military and civilian courtesies.
- Demonstrate nonverbal expressions and gestures appropriate to the situation.
- Are personally energetic.
- Cope with hardship.
- Complete physically demanding endeavors.
- Continue to function under adverse conditions.
- Lead by example in performance, fitness, and appearance.

EMOTIONAL ATTRIBUTES

B-11. Leaders who demonstrate appropriate emotional attributes—

- Show self-confidence.
- Remain calm during conditions of stress, chaos, and rapid change.
- Exercise self-control, balance, and stability.
- Maintain a positive attitude.
- Demonstrate mature, responsible behavior that inspires trust and earns respect.

SKILLS

INTERPERSONAL SKILLS

B-12. Leaders who demonstrate interpersonal skills—

- Coach, teach, counsel, motivate, and empower subordinates.
- Readily interact with others.
- Earn trust and respect.
- Actively contribute to problem solving and decision making.
- Are sought out by peers for expertise and counsel

CONCEPTUAL SKILLS

B-13. Leaders who demonstrate conceptual skills—

- Reason critically and ethically.
- Think creatively.
- Anticipate requirements and contingencies.
- Improvise within the commander’s intent.

- Use appropriate reference materials.
- Pay attention to details.

TECHNICAL SKILLS

B-14. Leaders who demonstrate technical skills—

- Possess or develop the expertise necessary to accomplish all assigned tasks and functions.
- Know standards for task accomplishment.
- Know the small unit tactics, techniques, and procedures that support the organization's mission.
- Know the drills that support the organization's mission.
- Prepare clear, concise operation orders.
- Understand how to apply the factors of mission, enemy, terrain and weather, troops, time available, and civil considerations (METT-TC) to mission analysis.
- Master basic soldier skills.
- Know how to use and maintain equipment.
- Know how and what to inspect or check.
- Use technology, especially information technology, to enhance communication.

TACTICAL SKILLS

B-15. Leaders who demonstrate tactical skills—

- Know how to apply warfighting doctrine within the commander's intent.
- Apply their professional knowledge, judgment, and warfighting skill at the appropriate leadership level.
- Combine and apply skill with people, ideas, and things to accomplish short-term missions.
- Apply skill with people, ideas, and things to train for, plan, prepare, execute and assess offensive, defensive, stability, and support actions.

ACTIONS

INFLUENCING

B-16. Leaders who influence—

- Use appropriate methods to reach goals while operating and improving.
- Motivate subordinates to accomplish assigned tasks and missions.
- Set the example by demonstrating enthusiasm for—and, if necessary, methods of—accomplishing assigned tasks.
- Make themselves available to assist peers and subordinates.

- Share information with subordinates.
- Encourage subordinates and peers to express candid opinions.
- Actively listen to feedback and act appropriately based on it.
- Mediate peer conflicts and disagreements.
- Tactfully confront and correct others when necessary.
- Earn respect and obtain willing cooperation of peers, subordinates, and superiors.
- Challenge others to match their example.
- Take care of subordinates and their families, providing for their health, welfare, morale, and training.
- Are persuasive in peer discussions and prudently rally peer pressure against peers when required.
- Provide a team vision for the future.
- Shape the organizational climate by setting, sustaining, and ensuring a values-based environment.

Communicating

B-17. Leaders who communicate effectively—

- Display good oral, written, and listening skills.
- Persuade others.
- Express thoughts and ideas clearly to individuals and groups.

B-18. **Oral Communication**. Leaders who effectively communicate orally—

- Speak clearly and concisely.
- Speak enthusiastically and maintain listeners' interest and involvement.
- Make appropriate eye contact when speaking.
- Use gestures that are appropriate but not distracting.
- Convey ideas, feelings, sincerity, and conviction.
- Express well-thought-out and well-organized ideas.
- Use grammatically and doctrinally correct terms and phrases.
- Use appropriate visual aids.
- Act to determine, recognize and resolve misunderstandings.
- Listen and watch attentively; make appropriate notes; convey the essence of what was said or done to others.
- React appropriately to verbal and nonverbal feedback.
- Keep conversations on track.

B-19. **Written Communication.** Leaders who effectively communicate in writing—

- Are understood in a single rapid reading by the intended audience.
- Use correct grammar, spelling, and punctuation.

- Have legible handwriting.
- Put the "bottom line up front."
- Use the active voice.
- Use an appropriate format, a clear organization, and a reasonably simple style.
- Use only essential acronyms and spell out those used.
- Stay on topic.
- Correctly use facts and data.

(DA Pam 600-67 discusses techniques for writing effectively.)

Decision Making

B-20. Leaders who make effective, timely decisions—

- Employ sound judgment and logical reasoning.
- Gather and analyze relevant information about changing situations to recognize and define emerging problems.
- Make logical assumptions in the absence of facts.
- Uncover critical issues to use as a guide in both making decisions and taking advantage of opportunities.
- Keep informed about developments and policy changes inside and outside the organization.
- Recognize and generate innovative solutions.
- Develop alternative courses of action and choose the best course of action based on analysis of their relative costs and benefits.
- Anticipate needs for action.
- Relate and compare information from different sources to identify possible cause-and-effect relationships.
- Consider the impact and implications of decisions on others and on situations.
- Involve others in decisions and keep them informed of consequences that affect them.
- Take charge when in charge.
- Define intent.
- Consider contingencies and their consequences.
- Remain decisive after discovering a mistake.
- Act in the absence of guidance.
- Improvise within commander’s intent; handle a fluid environment.

Motivating

B-21. Leaders who effectively motivate—

- Inspire, encourage, and guide others toward mission accomplishment.
- Don’t show discouragement when facing setbacks.
- Attempt to satisfy subordinates’ needs.

- Give subordinates the reason for tasks.
- Provide accurate, timely, and (where appropriate) positive feedback.
- Actively listen for feedback from subordinates.
- Use feedback to modify duties, tasks, requirements, and goals when appropriate.
- Recognize individual and team accomplishments and reward them appropriately.
- Recognize poor performance and address it appropriately.
- Justly apply disciplinary measures.
- Keep subordinates informed.
- Clearly articulate expectations.
- Consider duty positions, capabilities, and developmental needs when assigning tasks.
- Provide early warning to subordinate leaders of tasks they will be responsible for.
- Define requirements by issuing clear and concise orders or guidance.
- Allocate as much time as possible for task completion.
- Accept responsibility for organizational performance. Credit subordinates for good performance. Take responsibility for and correct poor performance.

OPERATING

B-22. Leaders who effectively operate—

- Accomplish short-term missions.
- Demonstrate tactical and technical competency appropriate to their rank and position.
- Complete individual and unit tasks to standard, on time, and within the commander's intent.

Planning and Preparing

B-23. Leaders who effectively plan—

- Develop feasible and acceptable plans for themselves and others that accomplish the mission while expending minimum resources and posturing the organization for future missions.
- Use forward planning to ensure each course of action achieves the desired outcome.
- Use reverse planning to ensure that all tasks can be executed in the time available and that tasks depending on other tasks are executed in the correct sequence.
- Determine specified and implied tasks and restate the higher headquarters' mission in terms appropriate to the organization.

- Incorporate adequate controls such as time phasing; ensure others understand when actions should begin or end.
- Adhere to the "1/3–2/3 Rule"; give subordinates time to plan.
- Allocate time to prepare and conduct rehearsals.
- Ensure all courses of action accomplish the mission within the commander's intent.
- Allocate available resources to competing demands by setting task priorities based on the relative importance of each task.
- Address likely contingencies.
- Remain flexible.
- Consider SOPs, the factors of METT-TC, and the military aspects of terrain (OCOKA).
- Coordinate plans with higher, lower, adjacent, and affected organizations.
- Personally arrive on time and meet deadlines; require subordinates and their organizations to accomplish tasks on time.
- Delegate all tasks except those they are required to do personally.
- Schedule activities so the organization meets all commitments in critical performance areas.
- Recognize and resolve scheduling conflicts.
- Notify peers and subordinates as far in advance as possible when their support is required.
- Use some form of a personal planning calendar to organize requirements.

Executing

B-24. Leaders who effectively execute—

- Use technical and tactical skills to meet mission standards, take care of people, and accomplish the mission with available resources.
- Perform individual and collective tasks to standard.
- Execute plans, adjusting when necessary, to accomplish the mission.
- Encourage initiative.
- Keep higher and lower headquarters, superiors, and subordinates informed.
- Keep track of people and equipment.
- Make necessary on-the-spot corrections.
- Adapt to and handle fluid environments.
- Fight through obstacles, difficulties, and hardships to accomplish the mission.
- Keep track of task assignments and suspenses; adjust assignments, if necessary; follow up.

Standard 15 Reference Excerpts

Assessing

B-25. Leaders who effectively assess—

- Use assessment techniques and evaluation tools (especially AARs) to identify lessons learned and facilitate consistent improvement.
- Establish and employ procedures for monitoring, coordinating, and regulating subordinates' actions and activities.
- Conduct initial assessments when beginning a new task or assuming a new position.
- Conduct IPRs.
- Analyze activities to determine how desired end states are achieved or affected.
- Seek sustainment in areas when the organization meets the standard.
- Observe and assess actions in progress without oversupervising.
- Judge results based on standards.
- Sort out important actual and potential problems.
- Conduct and facilitate AARs; identify lessons.
- Determine causes, effects, and contributing factors for problems.
- Analyze activities to determine how desired end states can be achieved ethically.

IMPROVING

B-26. Leaders who effectively improve the organization—

- Sustain skills and actions that benefit themselves and each of their people for the future.
- Sustain and renew the organization for the future by managing change and exploiting individual and institutional learning capabilities.
- Create and sustain an environment where all leaders, subordinates, and organizations can reach their full potential.

Developing

B-27. Leaders who effectively develop—

- Strive to improve themselves, subordinates, and the organization.
- Mentor by investing adequate time and effort in counseling, coaching, and teaching their individual subordinates and subordinate leaders.
- Set the example by displaying high standards of duty performance, personal appearance, military and professional bearing, and ethics.
- Create a climate that expects good performance, recognizes superior performance, and doesn't accept poor performance.
- Design tasks to provide practice in areas of subordinate leaders' weaknesses.

- Clearly articulate tasks and expectations and set realistic standards.
- Guide subordinate leaders in thinking through problems for themselves.
- Anticipate mistakes and freely offer assistance without being overbearing.
- Observe, assess, counsel, coach, and evaluate subordinate leaders.
- Motivate subordinates to develop themselves.
- Arrange training opportunities that help subordinates achieve insight, self-awareness, self-esteem, and effectiveness.
- Balance the organization's tasks, goals, and objectives with subordinates' personal and professional needs.
- Develop subordinate leaders who demonstrate respect for natural resources and the environment.
- Act to expand and enhance subordinates' competence and self-confidence.
- Encourage initiative.
- Create and contribute to a positive organizational climate.
- Build on successes.
- Improve weaknesses.

Building

B-28. Leaders who effectively build—

- Spend time and resources improving the organization.
- Foster a healthy ethical climate.
- Act to improve the organization's collective performance.
- Comply with and support organizational goals.
- Encourage people to work effectively with each other.
- Promote teamwork and team achievement.
- Are examples of team players.
- Offer suggestions, but properly execute decisions of the chain of command and NCO support channel—even unpopular ones—as if they were their own.
- Accept and act on assigned tasks.
- Volunteer in useful ways.
- Remain positive when the situation becomes confused or changes.
- Use the chain of command and NCO support channel to solve problems.
- Support equal opportunity.
- Prevent sexual harassment.
- Participate in organizational activities and functions.
- Participate in team tasks and missions without being requested to do so.

- Establish an organizational climate that demonstrates respect for the environment and stewards natural resources.

Learning

B-29. Leaders who effectively learn—

- Seek self-improvement in weak areas.
- Encourage organizational growth.
- Envision, adapt, and lead change.
- Act to expand and enhance personal and organizational knowledge and capabilities.
- Apply lessons learned.
- Ask incisive questions.
- Envision ways to improve.
- Design ways to practice.
- Endeavor to broaden their understanding.
- Transform experience into knowledge and use it to improve future performance.
- Make knowledge accessible to the entire organization.
- Exhibit reasonable self-awareness.
- Take time off to grow and recreate.
- Embrace and manage change; adopt a future orientation.
- Use experience to improve themselves and the organization.

Applicable POI and Course Management Plan.

Tab 16

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Training Course Design

VI-6-1. Chapter Overview

Introduction a. This chapter provides training course design guidance for implementation once short-term training design strategies have determined the need for a training course. It includes policy for the design of training courses; lessons/lesson plans; correspondence subcourses; and courses/lessons using video teletraining (VTT), Interactive Multimedia Instruction ([IMI) (e.g., Computer-based Instruction [CBI]) and training aids, devices, simulators, and simulations [TADSS]. It covers media/method/site selection that helps ensure effective and cost-efficient training courses.

Note 1: See appropriate chapters for further development guidance on subcourses, VTT, multimedia, and TADSS.

Note 2: See Chapter I-1, Training Product Classification, Foreign Disclosure (FD) Restriction Statements, and Copyright/Proprietary Materials, for FD and copyright policy and guidance.

Note 3: See Chapter VI-3, Individual Task Management: Common, Shared, and Branch, for Common Core Training Support Package (TSP) design policy and guidance.

Chapter Index b. This chapter covers the following:

Content	Paragraph
Administrative Information	VI-6-2
Training Course Design Process Description and Requirements	VI-6-3
Total Army Training System (TATS) Course Design Requirements	VI-6-4
Training Prerequisites	VI-6-5
Learning Objective (LO) Descriptive Details	VI-6-6
Structuring and Sequencing	VI-6-7
Learning Steps/Activities Descriptive Details	VI-6-8
Resources Identification	VI-6-9
Lesson Outline	VI-6-10

VI-6-2. Administrative Information

Purpose a. Training course design uses the individual short-range training strategy and critical task analysis data to provide a training course blueprint. Effective training design ensures sequential, progressive, cost efficient, and effective training.

References b. Required references and Internet addresses are as follows:

Regulatory:

(1) AR 351-1, Individual Military Education and Training.
(2) FM 25-100, Training the Force
(3) TRADOC Reg 351-10, Institutional Leader Education and Training.
(4) Other Chapters, this regulation:
  (a) Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/Proprietary Materials
  (b) Chapter I-2, Safety and Environment
  (c) Chapter II-8, Training Requirements Analysis System (TRAS)
  (d) Chapter II-9, Distance Learning
  (e) Chapter IV-2, Combined Arms Training Strategy (CATS).
  (f) Chapter VI-3, Individual Task Management: Common, Shared, and Branch
  (g) Chapter VI-4, Individual Training Design: Individual Training Strategies and Course/Product Design.
  (h) Chapter VI-7, Student Performance Measurement/Testing
  (i) Chapter VI-8, Training Course Development
  (j) Appendix D, Standard Verb List
  (k) Appendix E, Lesson Plan, Training Support Package (TSP), and Course Management Plan (CMP) Formats and Components
  (l) Appendix H, Methods and Techniques for Delivering Instruction
  (m) Appendix K, TATS Course Checklist

Procedural:

(1) Total Army Distance Learning Program Master Plan (TADLP MP)
(2) Total Army Distance Learning Program Operations Directive (30 Jun 98)
(3) TATS Course Handbook 350-70-TATS
Note: TRADOC Training Course Design Procedural Guidance *TBD.*

Internet:

(1) Army Doctrine and Training Digital Library: http://www.adtdl.army.mil
(2) Defense Automated Visual Information System (DAVIS)/Defense Instructional Technology Information System (DIDIS): http://dodimagery.afis.osd.mil/dvi/Top/davis
(3) TRADOC Technical Media Standards: http://www.atsc.army.mil/dld/standard.htm

Definitions c. See Glossary for training development-related terms. An understanding of the following terms is necessary for this chapter.

- TATS Training Year
- TATS Course
- Phase
- Subcourse
- Module
- Terminal learning objective (TLO)
- Enabling learning objective (ELO)
- Generic training
- Generic tasks
- Lesson
- Lesson plan
- Technique of delivery
- Method of instruction

- Learning objective

Responsi-bilities

d. See Appendix B, Responsibilities, for top-level TD-related responsibilities.
TD Proponent responsibilities related to training course design/redesign are as follows:

Activity	Responsibility
(1) HQ TRADOC, Deputy Chief of Staff for Training (DCST) and Deputy Chief of Staff for Education (DCSED)	(a) Develops training course design policy. (DCST, Training Development Analysis Activity [TDAA]) (b) Exercises approval authority for --- 1 Prioritized course list for redesign to distance learning (by end of 2nd QTR each fiscal year). (DCST, TDAA) 2 Exceptions to TATS Training Year requirement (DCSED with staff input from DCST, Training Operations Management Activity [TOMA] and DCST, TDAA) and Total Army Course Structure/Media (DCST, TDAA with staff input from DCST, TOMA and DCSED). 3 Elimination of Inactive Duty Training (IDT) Skill Level 1 training when requested by a Training/TD (Task) Proponent. (DCST, Individual Training Directorate [ITD]) (c) Develops Memoranda of Agreement (MOAs) as required for TATS Course analysis /redesign and design of distance learning (DL) modules. (DCST, TDAA) (d) Resolves deadlocked TATS Course design issues between the proponent school and the Total Army School System (TASS) Training Battalions. (DCST, TDAA)
(1) HQ TRADOC, DCST and DCSED (continued)	(e) Provides TD consultant services for TATS course design. (DCST, TDAA) (f) Staffs TATS Course Programs of Instruction (POIs) with DCST, ITD. (DCST, TOMA) (g) Reviews TATS Course POIs for content and verification of a TATS Training Year and Total Army Course Structure/Media unless exception is granted. (DCST, TOMA) (h) Resolve disagreement between the training proponent and TRADOC Management Agency (TMA). (DCST, TOMA)
(2) Commander, Army Training Support Center (ATSC)	(a) Assists proponent schools in writing statements of work (SOWs) for TATS Course analysis and redesign/ development as well as for design of DL modules

	under the multimedia contract. (b) Provides assistance to proponent schools in the analysis and redesign of TATS courses in support of and as requested by DCST, TDAA. (c) Updates and publishes annually (by end of 2nd QTR each fiscal year) TRADOC Technical Media Standards used for developing TATS courseware and products published in the Army Doctrine and Training Digital Library (ADTDL). (d) Provides a TD automated system to implement the training design requirements of this regulation.
(3) Commanders/ Commandants, Training/TD (Task) Proponents	(a) Review/Provide input to major command (MACOM)-proposed draft list of TATS Course candidates for redesign to distance learning. (b) Provide input to and staff MOAs as required for TATS Course analysis and redesign/development. (c) Obtain colonel or general officer signature on TATS Course MOAs as appropriate. (d) Develop SOWs for TATS Course analysis and redesign as well as for design/development of DL modules under the multimedia contract. (e) Coordinate elimination of IDT Skill Level 1 training with CG, TRADOC, ATTN: ATTG-I, before the change is made. (f) Design/Redesign/Maintain current training, including staff and faculty training, in accordance with this regulation and procedures detailed in supporting procedural guides. (g) Translate the critical task and task performance specifications into learning objectives. (h) Write a performance oriented TLO for each lesson that fully describes (in action, condition, and standard terms) student-required performance. (i) Design task-based, performance oriented, hands-on, sequential, progressive training and testing. (j) Design cost efficient and effective training for each lesson/ phase/module. (k) Ensure training is horizontally and vertically aligned. (l) Provide a mandatory training sequence and structure that maximizes learning and training effectiveness and minimizes training costs. (m) Include safety and environment considerations. (n) Assign a risk assessment code (RAC) to each lesson.

(3) Commanders/ Commandants, Training/TD (Task) Proponents (continued)	(o) Address peacetime and mobilization requirements. (p) Identify impacts on mission accomplishment caused by training resource shortfalls and constraints. (q) Include common task and common skill level task training. (r) Accommodate international military students' (IMS) special needs. (s) Include training course design/redesign requirements in the automated TD workload database, currently Automated Systems Approach to Training (ASAT, Resource Management menu option). (t) Identify copyright, classification marking, and FD restriction statement requirements for design products IAW Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/Proprietary Materials. (u) Design TATS Courses --- 1. Including common core, to fit within one TATS Training Year unless exception is granted by the DCST. 2 Using **Total Army Course structure (phases, modules, tracks, lessons, tests) and media** (to ensure training of all soldiers to perform to task performance standard unless exception is granted by the DCST). 2 IAW TRADOC Technical Media Standards. 3 As appropriate to be adaptable for reclassification training. 4 With consideration of ARNG/USAR training capabilities: equipment differences, limited training time and training facilities, and long periods between ARNG/USAR periods of instruction. (v) For TATS Courses, coordinate with **National Guard Bureau (NGB)**, Training Division, and **Headquarters, U.S. Army Reserve Command (USARC)**, Individual Training, **through the Deputy Assistant Commandant (DAC) (ARNG or USAR) or Total Force Integration Officer (TFIO)**: 1 **For subject matter expert (SME) support** from functionally aligned TASS Training Battalions: a Revised job and task analyses. b Course design and development.

	c Courseware validation. ***Note:*** Distance TD is possible when automation capabilities permit. 2 **For concurrence**: a Proposed TATS Course Structure (including Common Core) and supporting narrative. b TATS Course POI. (w) Resolve Proposed TATS Course Structure and TATS Course POI issues with NGB and USARC; forward unresolved issues to DCSED through DCST, TDAA. (x) Forward requests for exception to TATS Training Year requirements to DCSED. (y) Forward requests for exception to Total Army Course Structure/Media to DCST, TDAA.

VI-6-3. Training Course Design Process Description and Requirements

Description a. Course design translates critical task analysis data into sequential, progressive training. It ---

(1) Is the process used to determine the optimum training strategy for each individual critical task and supporting skills and knowledge.

(2) Is the process used to translate each individual critical task and supporting skills and knowledge into learning objectives.

(3) Ensures the overall efficiency and effectiveness of the total training program/ system.

(4) Identifies all resource requirements.

(5) Establishes ---

(a) How (media/method), when, and where training will be conducted.

(b) Training structure (courses, phases, annexes, lessons, etc.).

(c) Mandatory training sequence.

(d) Unit/student tests.

(e) Graduation requirements.

Outputs b. Training course design is a **minimum essential requirement** before development of training courses, including correspondence subcourses and courses/lessons using VTT, IMI and TADSS. **Required** training course design outputs:

(1) Designed peacetime and mobilization courses, consisting of **---**

(a) Mandatory training sequence.

(b) Training course length.

(c) Lesson outlines (including learning objectives).

(d) Training resource requirements.

(e) Student Evaluation Plan.

(f) Course Map.

(g) Test items/test design.

(h) Scripts and story boards (as appropriate).

(2) Course Management Plan (CMP).

(3) Compiled POI.

(4) Course Administrative Data (CAD).

(5) Revised ITP.

Start Point c. Courses may be developed for a new job or redesigned to maintain currency.

(1) **New:** Individual training course design is initiated when short-term individual training strategies determine (through the use of task analysis data during the conduct of site and media selection) that the most cost efficient and effective training is a training course.

(2) **Revision/**Course revision or redesign occurs when a combined arms training

Redesign: strategy or needs analysis indicates a requirement to change or update the training or when there is a new, more efficient/effective way to present training. Redesign can consist of minor course revisions or the major redesign of a course to accommodate new equipment requirements, etc.

Note: Do not revise existing course products just to meet new format requirements. Training proponent should incorporate new formats required by this regulation only when these products undergo revision for major content changes.

Criteria for Resident Training

d. Reasons for deciding to train a particular task or supporting skill/knowledge in resident training are as follows:

Equipment/ facilities availability	This hinges on several factors such as availability, cost, location, and safety/environmental considerations. It includes the hands-on portion of the training but not the knowledge foundation which should usually be done by distance learning. IMI should be considered for use in presenting equipment demonstrations and practice when cost effective and efficient. IMI can be used in resident training or for distance learning.
Personnel interface requirement	This is training where the interface between students or instructor/ student is vital. It includes such things as leadership demonstration, live exercises, and solderization. The knowledge foundation for this training should be presented via distance learning.
Security	This is a controlling factor but not a TD reason. Classified training should not be presented by any means that violates security. Distance learning should not be used for presenting classified training unless there is a secure means for controlling that training.
Cost efficiency	There are factors that make distance learning inefficient. For example, if there are a large number of individuals in the target audience, then development of IMI may make sense. However, if there are very few members in the target audience or task performance procedures change frequently, then it may not be cost effective to develop or distribute an IMI.

Training Course Design Procedures

e. The following procedures and major requirements apply to training course design. They cover design of resident training courses; lesson plans; correspondence subcourses; and courses/lessons using VTT, multimedia (including IMI), and TADSS. See appropriate product chapter in this regulation for development guidance for these products.

Note 1: See Section VI-6-4, TATS Course Design Requirements, for TATS Course-specific design guidance.

Note 2: See Chapter II-9, DL, for DL course structure guidance.
Note 3: Use the HQ TRADOC TD automation system (currently ASAT suite of tools) as the automation tools meet the course design functional requirements in this regulation.

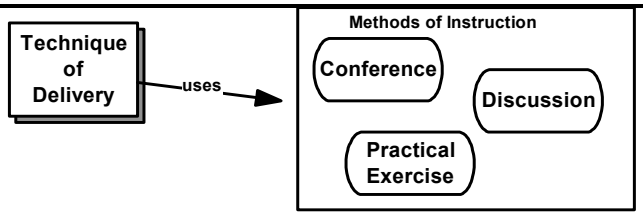
Step	Activities
(1) Establish the design team.	(a) Include the same individuals who conducted the analysis. (b) Use same team for development also.
(2) Acquire the analysis data.	(a) Revisit job to verify critical tasks (reconvene tasks selection board as necessary). (b) Review/revise task analysis data as necessary. (c) Make appropriate revisions per Chapters VI-1, Job Analysis, and VI-2, Individual Task Analysis. (d) Use the task analysis data to perform the following steps.
(3) Establish purpose and scope of training.	(a) Identify training prerequisites. ***Note:*** See "Training Prerequisites" (this chapter). (b) Verify tasks and supporting skills and knowledge to be trained. ***Note 1:*** See Chapter VI 4, Individual Training Design. ***Note 2:*** Short-range training strategies have determined initial media selection for each task.

Training Course Design Procedures (Continued)

Step	Activities
(4) Establish training structure.	(a) Determine --- 1 Phases. 2 Modules (e.g., subcourse). 3 Lessons. 4 Tests. ***Note:*** See "Structuring and Sequencing" (this chapter). (b) Establish the technique(s) of delivery for each module. This is the manner in which instruction will be presented. Training designers must give special attention when designing courses into modules for distance learning to ensure that techniques of delivery per module are conducive for DL module management. **Examples** of techniques of delivery are Small Group Instruction (SGI) and VTT. ***Note 1:*** See Appendix H, Methods and Techniques for Delivering Instruction. ***Note 2:*** *Advisor 3.0* is a useful tool for determining media effectiveness and return on investment at the course and module level. ***Note 3:*** Recommend use of Artificially Intelligent Managers Media Model (AIMMM) for determining the feasibility, acceptability, and supportability of a media approach for a course or module. (c) For TASS Training Battalion, assign each module, including distance learning modules, against AT/ADT or IDT for implementation management purposes. Implementation may include resident or non-resident training per design. (d) Design courses as appropriate to be adaptable for reclassification training. Common core, shared, and military occupational specialty (MOS)/area of concentration (AOC)-specific training should be separate modules to allow for reclassification training of branch as well as new shared task training within one TATS Training Year.

(5)Create the lesson outlines.	***Note:*** The lesson outline is the skeleton that becomes the lesson plan or self-paced lesson. See "Lesson Outline" (this chapter). (a) Write one TLO per lesson. (See "Learning Objectives (LO) Descriptive Details" (this chapter). (b) Write ELOs as needed. Recommend use of Media Elimination & Design Intelligent Aid (MEDIA). (c) Write learning steps/activities. (d) Include at the proper level IAW "Learning Steps/Activities Descriptive Details" (this chapter): 1 Environmental factors and considerations. 2 Safety notes and cautions. 3 Sustainment training requirements. 4 Reference information, e.g., title, chapter, paragraph number. 5 Distance learning considerations when determining --- a Methods of instruction. This is the way instruction will be presented to the students. **Examples** of methods of instruction are conference, demonstration, practical exercise, and test. (see Appendix H). b Technique of delivery and Media selection, considering user capabilities.

Training Course Design Procedures (Continued)

Step	Activities
(5)Create the lesson outlines. (continued)	 ***Note 1:*** See Chapter II-9, Paragraph II-9-5, for DL technique of delivery and media selection guidance. ***Note 2:*** Recommend use of MEDIA. ***Note 3:*** Support the live, virtual, and constructive training environments by considering the use of constructive or virtual simulation at crawl, walk, or run levels for task training that is too expensive, dangerous, or ecologically/ environmentally unsound to conduct live. ***Note 4:*** Consider the crawl/walk/run concept. (e) Assign a risk code for each lesson. (f) Identify copyright, classification marking, and FD restriction statement requirements IAW Chapter I-1, Training Product Classification, FD Restriction Statements, and Copyright/ Proprietary Materials (g) Determine need for outside student assignments.
(6) Create a Lesson Title.	Write a lesson title and assign a lesson number. Title may be the same as the critical task if the lesson covers a single task in its entirety. It will be different to reflect lesson content if the lesson covers more than one task or skills/knowledge covering several tasks.
(7) Write test items, tests, and Student Evaluation Plan.	(a) Write criterion-referenced test items that measure the performance required by the learning objective. ***Note:***Items should be written immediately after writing the TLO/ELO(s). (b) Construct test instrument. (c) Write the Student Evaluation Plan, to include graduation criteria. ***Note:*** See Chapter VI 7, Student Performance Measurement/Testing, for test development and Student Evaluation Plan policy and guidance.

	(8) Establish training sequence.	(a) Sequence --- 1 Terminal learning objectives, enabling learning objectives, learning steps/activities. 2 Courses, phases, modules (subcourses), lessons, tests. (b) Build the course map, identifying acceptable alternate sequences. ***Note:*** See "Structuring and Sequencing" (this chapter).
	(9) Establish training length.	Calculate **total** training length by compiling time requirements for each lesson (see Chapter II-8, TRAS). The training length is a factor of how long it takes to train the average student to the established standards. ***Note:*** Avoid excessive training lengths. Give prime consideration to using distance learning techniques. (a) **Lesson length** is identified in academic hours. An academic hour consists of 50 minutes of training. Lesson length is the sum of the included learning steps/activities "time of instruction (minutes)."
Design Procedures	(9) Establish training length (continued).	***Note:*** Avoid excessive lesson lengths. Presenting training in smaller packages helps to keep students focused on what must be learned. (b) **Module length** is the sum of included lesson lengths. (c) **Phase length** is the sum of the included module lengths.
	(10) Determine total resource require-ments.	Identify all formal training and evaluation resource requirements (instructors, support personnel, classrooms, labs, training areas, ranges, OPTEMPO, ammunition, equipment, consumables, etc.). ***Note:*** See "Resource Identification" (this chapter).
	(11) Provide TRAS informa-tion.	(a) Provide Individual Training Plan (ITP) data. (b) Provide CAD data. (c) Compile the POI. See Chapter II-8, TRAS.
	(12)Obtain design and POI approvals.	
	(13)Update/revise design as needed.	

Note: The procedures listed above are for an initial course design effort. All of these steps may not be required for a revision effort.

Redundant Training

f. Avoid redundant training. Redundant training occurs when training of a task is repeated at subsequent skill levels. Training/Task (TD) proponents need to ensure that each course initially trains only those critical tasks for the skill level being trained. Refresher training is used to reinforce previous training and/or sustain/regain previously acquired skills and knowledge. Lower skill level tasks and supporting skills and knowledge may be reinforced in a higher skill level course.

Common Core

g. Common core is primarily organizational level critical tasks and may include some common soldier and common skill level tasks. Executive agents are responsible for ---

Training

(1) Common core design and implementation within their respective education systems. They will develop common core short-range individual training strategy and implementation guidance for their respective leader development courses.
(2) Ensuring common core training is progressive, sequential, vertically aligned, and based on the job/duty requirements at the appropriate skill level.
(3) Ensuring standardized training and horizontal alignment between affected education systems.

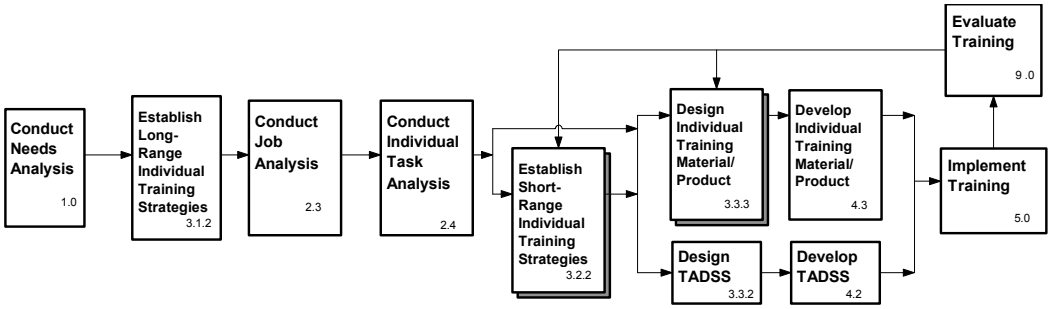
Note: See common core responsibilities and guidance in Chapter VI-3, Individual Task Management: Common, Shared, and Branch

Process Completion

h. Training course design is completed when the appropriate proponent command authority approves the developed course design.

Process Flows

i. The following flow diagram depicts the relationship between training course design and other TD phases.



Quality Control

j. To ensure quality results from the training, design personnel must ensure ---
(1) Training is sequential and progressive.
(2) Design applies sound training development principles.
(3) Design is technically correct.
(4) Student evaluation determines if students can accomplish the training objectives.
(5) Design includes the most efficient and effective methods of instruction, techniques of delivery, and training site selections.

VI-6-4. Total Army Training System (TATS) Course Design Requirements

Introduction

a. TRADOC's mission is to train the Total Army (i.e., Active Army (both military and civilian), Army National Guard, and U.S. Army Reserve Forces) for the full continuum of military operations. To meet this challenge, training at proponent schools and TASS Training Battalions needs to ensure the training of all course critical tasks prepare the soldier to perform to task performance standard. TATS Courses will help meet this challenge, and the goal is for all courses to be considered for redesign as TATS courses and to eventually become TATS courses if feasible. In addition to the above training course design requirements, this paragraph contains guidance specific for TATS Course design and related issues.

Description

b. A TATS Course is a single course designed to train the same MOS/AOC skill level, Skill Qualification Identifier (SQI), additional skill

identifier (ASI), Language Identifier Code (LIC), and Skill Identifier (SI) within the Total Army. It also includes MOS qualification (MOSQ, i.e., reclassification), Army leadership, functional, professional development, and civilian courses. The course's Total Army structure (phases, modules, tracks, lessons, tests) and media ensure standardization by training all soldiers (regardless of component) on course critical tasks to task performance standard. Course lengths, but not academic hours, may vary due to such differences as Active Component (AC) and Reserve Component (RC) training day lengths.

Note 1: Initial TATS Course redesign focuses on existing comparable AC and RC courses that are being redesigned as a single course meeting the training needs of the Total Army.

Note 2: The intent is for all courses to eventually become TATS Courses.

Note 3 Officer Basic Courses (OBCs) and Warrant Officer Basic Courses (WOBCs) as well as initial entry and initial active duty training (IET/IADT) (which includes Basic Combat Training [BCT], Advanced Individual Training [AIT], and one-station unit training [OSUT]) are already considered as TATS Courses as they are "one-of-a-kind" courses attended by AC/RC soldiers at the same applicable AC training sites.

Note 4: All new development of training packages exported to TASS Training Battalions will be TATS Course TSPs.

Management

c. Requirements for proponent management of TATS Courses is as follows:

(1) Review to establish currency of TATS Courses.

Note: A course is considered obsolete and in need of major revisions when over 30% of course lessons require revision. Lesson revisions would result due to task performance changes that threaten survivability/ mission accomplishment or that result in a major environmental or safety impact.

(2) Prioritize proponent TATS Course redesign/revisions, considering ---

(a) Readiness (i.e., MOSQ) and mobilization requirements.
(b) Force structure changes.
(c) MOS changes/consolidations.
(d) Course currency/obsolescence.
(e) Equipment/Doctrine changes and technological upgrades.
(f) Return on investment, i.e., training load, density of proponent MOSs within a TASS region, adaptability of ARNG/USAR time constraints, TD resources.
(g) TD backlog.

(3) Coordinate with the RC community. This is critical to ensure successful TATS Course production. Proponent schools must **coordinate through their DAC (ARNG or USAR) or TFIO for ---**

(a) **SME support** for ---
1 Revised job and task analyses.
2 TATS Course design and development.
3 Courseware validation.

(b) **Concurrence** of each ---

1 Proposed TATS Course Structure (including Common Core) and supporting narrative. (See Paragraph VI-6-7.f for sample.)
2 TATS Course POI.

Note 1: The concurrence actions occur at approximately the 35% and 50% overall course completion points (which includes analysis, design, and development actions).

Note 2: For POIs affecting TASS Battalions: submit POIs fifteen (15) months prior to implementation of a **new** TATS course to allow time for acquisition of necessary resources (e.g., facilities, equipment, ammo, and courseware) IAW Chapter II-8, TRAS.

Note 3: Maintain agency coordination sheets and documentation summarizing resolution/non-resolution of Proposed TATS Course Structure, POI, and validation issues. Final course documentation forwarded to HQ TRADOC (DCST, TOMA) will contain copies of coordination results.

(4) Resolve Proposed TATS Course Structure and TATS Course POI issues with NGB and USARC; forward unresolved issues to DCSED through DCST, TDAA.
(5) Forward requests for exception to TATS Training Year requirements to DCSED.
(6) Forward requests for exception to Total Army Course Structure/Media to DCST, TDAA.
(7) Schedule TATS Course design in the automated TD workload management database.
(8) Manage TATS Course analysis, design, development to ensure timely implementation.

Note: Training/TD (Task) Proponents may forward as desired electronic **info copies** of the Proposed TATS Course Structure and POIs to the Regional Coordinating Elements (RCEs), appropriate TASS training battalions, Forces Command (FORSCOM), U.S. Army Europe (USAREUR), U.S. Army Pacific (USARPAC), and other MACOMs.

Analysis

d. As noted, training course design begins with a revisit to task analysis data. Training/
TD (Task) Proponents must coordinate with the RC community for SME support through the DAC (ARNG or USAR) or TFIO, as appropriate. Include RC SMEs on Task Selection Board. If on-site SMEs are not available, attempt "distance TD when automation capabilities permit.

Training Strategy

e. Proponent training strategy requirements (see Chapter VI-4, Individual Training Design):
(1) Revise the short-range individual training strategy for the job for which a TATS Course is to be revised/developed to determine ---
(a) Which task(s) will be trained in the TATS Course.

(b) The best media to train these tasks.

(2) Revise appropriate short-range training strategy supporting plans.

(3) Develop a Proposed TATS Course Structure; coordinate with NGB and USARC, resolve issues, and seek exception as outlined in this chapter.

Note: Current constraints dictate that resident DL for Branch Phases of Captains Career Course will not be developed for IDT.

Course Design

f. Design TATS Courses in accordance with preceding training course design requirements in this chapter. In addition, the following requirements apply specifically to TATS Courses.

(1) **Do not** reconfigure existing AC courses: revisit the individual training strategy and existing AC and RC versions; redesign a new TATS course to train the selected tasks to the Total Army audience.

(2) **All TATS Courseware must be in compliance with** ---

(a) TRADOC Technical Media Standards. The Army has established technical multimedia standards. These standards are critical to ensure digital exchange of training data across user platforms and usability of courseware by the Total Army. They also facilitate upgrading and standardization of courseware and will reduce TD workload due to data sharing. Furthermore, the Total Army Distance Learning Program Master Plan (TADLP-MP) Program Manager (PM)/TRADOC Program Integration Office (TPIO) will not accept products that do not meet these system requirements. The ATSC will update and publish annually (by end of 2nd QTR each fiscal year) the TRADOC Technical Media Standards to be used for developing TATS courseware and products.

(b) Format and guidance in Appendix E, Lesson Plan, TSP, and CMP Formats and Components.

(c) Guidance in Appendix K, TATS Course Checklist. This list describes the components of a completed, digitized TATS Course. It will be used by Training/TD (Task) Proponents to plan for and deliver, with in-house or contract support, all components of a TATS Course suitable for training execution. It will also be used by ATSC to ensure all requisite course components have been received for delivery processing as a completed TATS Course.

(3) **Design training to allow student completion within one TATS Training Year**, to include Common Core. See “TATS Training Year” (this chapter).

Note: As an exception to the one-year TATS policy, Captains Career Course will take up to **two** TATS Training Years and the annual limit of 75 hours of distance learning per course is waived. However, Training/TD (Task) Proponents must coordinate all proposed TATS course structures with NGB and USARC and, as required, request TATS Training Year and TA course structure/media exceptions.

(4) **Use a Total Army (TA) course structure (phases, modules, tracks, lessons, tests) and media** to ensure training of all soldiers to perform to task performance standard. See "TA Course Structure/Media" (this chapter).
(5) **Design reclassification training as required.** Reclassification training entails the training of soldiers to perform a different job within a given career management field (CMF) (from one MOS/AOC to another) and across CMFs (one CMF to another). See "Reclassification Training" (this chapter).
(6) **Design considerations must include** ---
(a) The most efficient and cost effective media at the LO and learning step/activity levels, optimizing target audience accessibility/use. In general, resident training should be used to provide training that requires ---
1 Use of equipment and facilities not available during IDT.
2 Hands-on performance oriented training.
3 Direct group interface.
Note: See VI-6-3, Training Course Design Process Description and Requirement, this Chapter.
(b) Use of distance learning phases or modules, where applicable.
1 For TASS Training Battalions, ---
a DL can be accomplished during AT/ADT, IDT, or non-resident, self-paced training (outside of formal AT/ADT or IDT).
b DL modules will be identified against IDT or ADT for management purposes. TASS Training Battalion students must be assigned against either AT/ADT or IDT for DL applications. TASS Training Battalions will be responsible for ensuring all properly enrolled students receive, complete, and pass tests. IMI tests are built directly into the module, which will automatically report test/module completion to instructors.
2 For enlisted reclassification courses, the number of non-resident DL student workload hours should generally be limited to 75 hours with the reasonable expectation that a soldier could complete 2 hours per week during a TATS Training Year. For non-resident DL exceeding 75 hours, coordinate Proposed TATS Course Structure for approval.
3 DL self-paced training modules must be fielded in a timely manner to allow for completion before follow-on training.
Note: See Chapter II-9, DL, for additional DL design guidance.
(c) Consideration of infrastructure (TASS classroom/DL facility) delivery dates in the Total Army Distance Learning Program Master Plan (TADLP MP).
(d) New equipment fieldings.

(e) Development of job aids/training on demand.

(7) **Sequence common core IAW Common Core Executive Agent guidance**.

(8) **Ensure design does not decrement ability to train to task performance/ certification standards**.

TA Course Structure/ Media

g. The intent of HQ TRADOC is for all TATS Courses to have a Total Army course structure and media. Development and maintenance of different media for the same module/lesson can double or more the costs; there is no associated funding for either initial development or maintenance of the alternative version/media.

(1) Design modules as appropriate to ensure adaptability for DL, reclassification/ transition, mobilization, and self-development training.

(2) Consider use of training tracks to allow for AC/RC hardware and media requirements/availability. Use of tracks must be in compliance with MOS/AOC qualification requirements.

(3) **Requests for Exception to Total Army Course Structure/ Media.** For all TATS Courses which do not have a single Total Army course structure/media, Training/TD (Task) Proponents will forward request for exception to DCST, TDAA. Requests for exceptions must include a Proposed TATS Course Structure and full justification for the exception to policy. Justification must cover ---

(a) DAC (ARNG or USAR) or TFIO memorandum stating (1) all course critical tasks will be trained to the Total Army to the same standard under the proposed course design; (2) justification for selection of different media for AC/RC training, to include cost associated with development of different media and life cycle management/maintenance of training product currency; and (3) reasons why multimedia and DL cannot be used to reduce resident training.

(b) Agency coordination sheets and documentation summarizing non-resolution of Reserve Component issues.

TATS Training Year

h. A TATS Training Year is a training year that meets both the requirements and constraints, to include equipment and time, of the Total Army. Reserve Components are generally limited to 323 academic hours during a "training year" consisting of Annual Training (AT)/Active Duty for Training (ADT); IDT; and non-resident, self-paced DL.

(1) The following table depicts a TATS Training Year.

(a) **AT/ADT**	(b) **IDT**
1 Provides a total of 14 (USAR)/15(ARNG) training days, designated by Congress, that includes time for --- a Travel. b Administrative requirements. c Training. d Physical training (PT). 2 Allows only 12 days for actual training. a In general, training efficiency limits actual training time to a maximum	1 Consists of forty eight (48) four (4) hour sessions (192 hours). Each 4 hour session is called a Unit Training Assembly (UTA). Four UTAs are usually combined into a Multiple Unit Training Assembly (MUTA4), another name for the one weekend a month RC soldiers assemble for training. 2 Allows the training developer to use only128 hours of the 192 hours for training because of mandatory unit training/work and administrative

of 120 hours (10 hours per day). b Training time can be extended to 134 hours with training exercises, e.g., a 24 hour field training exercise. 3 May involve use of DL modules.	requirements. 3 Allows 4 hours of administrative time during the first TASS Training Battalion IDT class. 4 Uses IDT periods, in general, to provide training prior to AT/ADT on knowledge as well as tasks and skills not dependent on equipment. a IMI use in IDT is dependent upon availability of computers and software. b Although future applications of resident DL may be trained during Captains Career Course IDT, current constraints dictate that resident DL for Branch Phases of Captains Career Course will not be developed for IDT. 5 May involve use of DL modules.
(c) **Distance Learning:** DL can be accomplished during --- a **Resident** AT/ADT or IDT. b **Non-resident,** remote, self-paced training (outside of formal AT/ADT, or IDT). As a general rule, **non-resident DL for enlisted reclassification is limited to a total of 75 hours** during a TATS Training Year. Annual limit of 75 hours distance learning is waived for Captains Career Course. Other exceptions are possible upon USARC and NGB approval.	

TATS Training Year

(Continued)

(2) **Requests for Exception to TATS Training Year.** Courses which exceed this period require a special "exception" from HQ, TRADOC. Training/Task (TD) proponents will forward the following to DCSED:

(a) Notification of those courses for which they received NGB and USARC concurrence. Include Proposed TATS Course Structure as well as agency (NGB and USARC) coordination sheets and documentation showing Reserve Component concurrence and resolution of issues.

(b) Requests for exception to TATS Training Year for courses for which they could **not** reach resolution. Requests for exceptions must include a Proposed TATS Course Structure and full justification for the exception to policy. Justification must cover ---

1 DAC (ARNG or USAR) or TFIO memorandum stating (1) all course critical tasks will be trained to the Total Army to the same standard under the proposed course design, (2) if applicable, justification for selection of different media for AC/RC training, to include cost associated with development of different media and life cycle management/maintenance of training product currency; and (3) reasons why multimedia and DL cannot be used to reduce resident training.

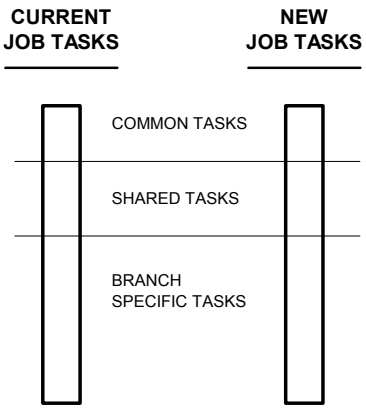
2 Agency coordination sheets and documentation summarizing non-resolution of Reserve Component issues.

Reclassification Training

i. Design courses into modules to allow for training of those tasks needed for job reclassification only (usually required branch-specific as well as shared task training) within one TATS Training Year. Properly developed modules will lend themselves to reclassification training within a given CMF as well as across CMFs. The most efficient and effective way to design reclassification training is to first prepare a task list specific for the soldier(s) being reclassified in order to identify the actual tasks to train. To prepare this task list:

(1) Compare critical task lists for the soldier's current job and the job to be trained.

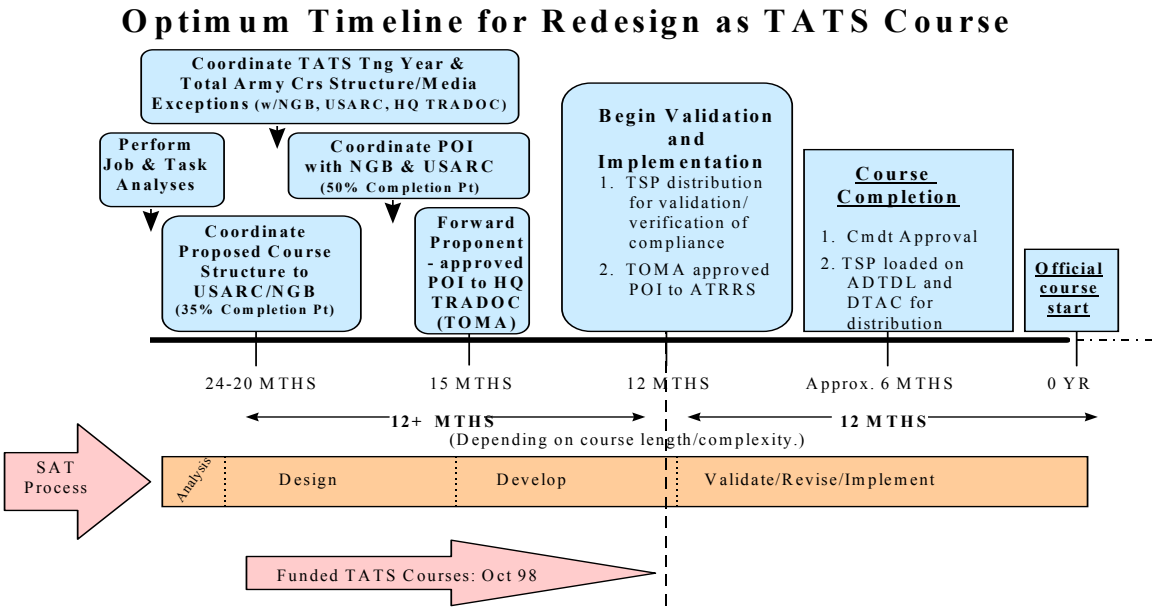
(2) Eliminate the tasks the soldier has already been trained to perform from the new job task list. This includes –
   (a) Common soldier tasks.
   (b) Common skill level tasks.
   (c) Shared Combat Arms (CA), Combat Support (CS), Combat Service Support (CSS) tasks.
   (d) Shared branch tasks.



(3) Then design training to train the remaining tasks (basically MOS/AOC-specific and shared tasks as needed).
   (a) Consider DL for reclassification training. If IMI is used in resident IET, these lessons should be designed so they may be useable for distance learning of reclassification training.
   (b) If desired, further define training requirements by comparing the skills and knowledge for the remaining tasks and eliminate the skill/knowledge training on which the soldier has already received training. Individual self-paced training using CBI has the capability to provide this training.
   (c) Structure a course with tracks to facilitate this training.

Optimum Timeline

j. The following graph depicts an optimum timeline for a TATS Course redesign.



Note: For a **new** TATS Course due to development of a new materiel system, the above timeline would reflect 5-year IPT and 3-year CAD actions.

VI-6-5. Training Prerequisites

Description. a. Training prerequisites are the tasks and supporting skills the target audience must be able to perform and the knowledge they must possess before training starts. They ---

(1) Establish entry level requirements so programs can have a common start point.

(2) Can limit programs to those who require training for job performance.

(3) Exist for courses, phases, modules, lessons, objectives, and learning steps.

(4) Are used to develop sequential, progressive training and eliminate or prevent development and implementation of unplanned or unnecessary duplicate training.

Procedure b. The activities involved in using training prerequisites are as follows:

Step	Action
(1)	Obtain the task performance specifications

(2)	Crosswalk the required skills and knowledge with the skills and knowledge acquired by previous training. ***Note:*** Using the task to skill/knowledge matrix is useful.
(3)	Determine sustainment (refresher) training requirements.
(4)	Design the training course. ***Note:*** See "Training Course Design Procedures" (this chapter).

Quality Control

c. Individuals involved in writing and reviewing training design must ensure prerequisite skills and knowledge identified during task analysis are ---

(1) Included in lower level training which is a prerequisite to the new/revised training.

(2) **NOT** included in the new/revised training except as planned reinforcement.

VI-6-6. Learning Objective (LO) Descriptive Details

Description

a. A LO is a statement describing student performance required to demonstrate competency in the material being taught in a formal training environment. This behavior must be performed under specific conditions to prescribed standard. LO components may or may not be worded the same as task component statements (task title, condition, and standard). LOs are written in terms of student performance, NOT instructor performance. LOs focus training development on what needs to be trained and focus student learning on what needs to be learned. They are performance oriented and ---

(1) Are derived from task performance specifications.

(2) Have three parts: Action, Condition, and Standard.

Note 1: Training objectives reflect task performance and supporting skills/knowledge to the highest possible level of fidelity in the field or operational environment. See FM 25-100, Training the Force.

Note 2: Fundamental to training development is the translation of the task selected for formal training into LOs. **DO NOT** minimize the importance of this step or the significance of the difference between tasks and objectives; LOs and tasks are **NOT** synonymous terms.

Types

b. The two types of learning objectives are as follows:

Type	Characteristics
(1) Terminal Learning Objective (TLO)	(a) Describes exactly what the student must be capable of performing under the stated conditions to the prescribed standard on lesson completion. (b) Is written for each lesson. (c) Occurs only **one** time per lesson regardless of presentation method, media, or technique. (d) May --- 1 Be the same as the task it supports. ***Note:*** Write TLOs to reflect on-the-job performance as much as possible. 2 Support a part of a task (i.e., a performance step, skill or knowledge). 3 Support more than one task. (e) Has only **one verb**.
(2) Enabling Learning Objective (ELO)	(a) Supports student learning of the TLO. (b) Is **optional** for lesson plans; is **required** for CBI lessons**.** (c) Describes exactly what the student must be capable of performing under the stated conditions to the prescribed standard on completion of a part of the lesson. (d) Has only **one verb**.

Component Statements

c. Learning objectives consist of three parts: Action, Condition, and Standard.

Component	Description
(1) Action	The action statement --- (a) Describes exactly what the student must do after completing a specific part of the training. (b) Is performance oriented. ***Note:*** We should train as we fight. Training in the field and on equipment is the preferred training method. When this is not possible, training should simulate actions required in task performance. (c) Begins with a single action verb. (d) Should be observable, measurable, and expressive behavior that is as concrete and overt as possible. ***Note:*** See Appendix D, Standard Verb List.

Component Statements (Continued)

Component	Description
(2) Condition	The condition statement --- (a) Reflects training conditions and identifies anything that has pertinent influence upon performance of the objective, including environment, equipment, manuals, assistance, or required supervision. (b) Is written to **training conditions**, **not actual wartime conditions**. (c) Should relate to the action only. (d) Should approximate projected operational environments to the closest extent possible. ***Note:*** The condition statement can be written in paragraph or bullet format.
(3) Standard	The standard statement may have multiple criteria. These can be written in paragraph or bullet format. The statement must reflect standards that --- (a) Are observable and provide clear, measurable criteria for evaluating learning objective performance, which will be influenced by the training conditions. (b) Describe the performance level students must achieve to satisfactorily complete the **training**. ***Note:*** The LO standard and task standard may be different, but all training should **prepare** the soldier **to perform to task performance standard.** (c) Minimize subjectivity during student evaluation. (d) Are written in the past tense.

Example:

Action: Process captured enemy materiel.

Condition: Given classroom environment; scenario and classroom instructions; captured enemy equipment/items consisting of a map, signal operation instructions, reference manuals, unidentified equipment, enemy equipment tags, and document tags; a sheet marked TECHDOC; blank spot reports; and unit Standard Operating Procedure (SOP) describing the processing and evaluation of captured enemy materiel.

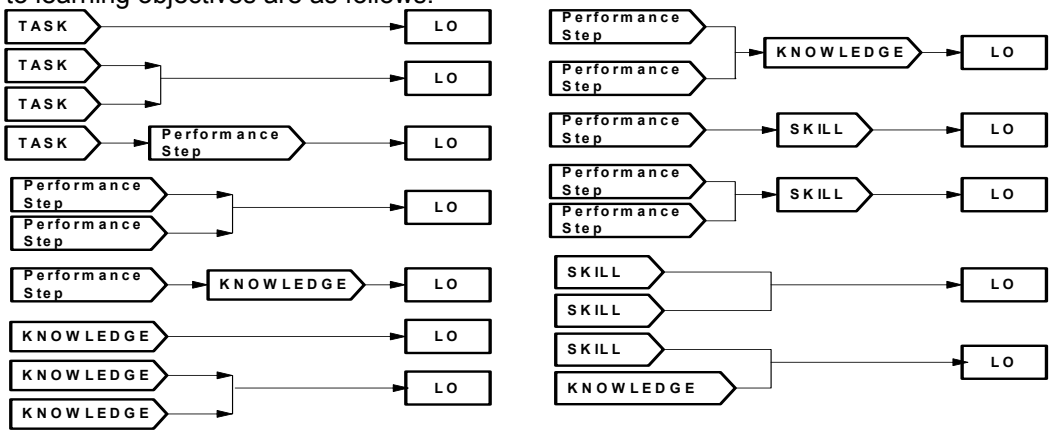
Standard: All captured enemy materiel is secured. Follow-on actions are completed, ensuring the following criteria are met IAW the unit SOP: (1) Spot reports are prepared for all captured enemy materiel known or believed to be of intelligence value. (2) Tags are completed and attached to all items of captured enemy materiel. (3) Correct disposition procedure for each item of captured enemy materiel is selected.

Generic Training

d. Consider using generic training. This is the training of skills and knowledge that support a number of individual critical tasks, e.g., tracing an electric circuit is a shill that supports a number of critical tasks. Generic training saves training time though it may increase course design time. The tasks supported must be identified in the lesson.
Note 1: Do not confuse "generic training" with "generic tasks."
Note 2: Use the task-to-skill/knowledge matrix.

Process Flow

e. The learning objective(s) should match the task as closely as possible. Some possible relationships of tasks, performance steps, and supporting skills and knowledge to learning objectives are as follows:



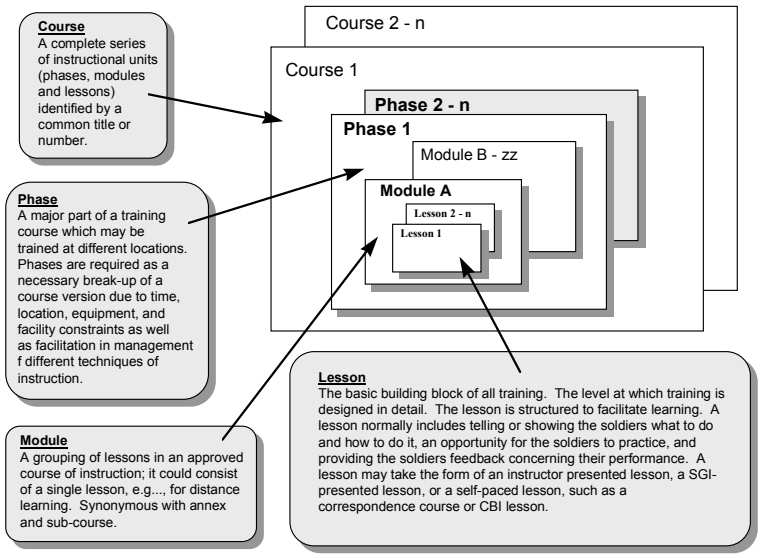
Quality Control

f. To ensure quality learning objectives, design personnel must ensure LOs ---
(1) Require and fully describe (in action, condition, and standard terms) student performance.
(2) Have only one verb.
(3) Have an observable standard that provides criteria for measuring learning objective performance.
(4) Apply sound training principles and will lead to the student being able to perform the supported tasks to their established standards.

VI-6-7. Structuring and Sequencing

Description

a. The training structure organizes the training and lays out the training sections (phases, modules, lessons, etc) graphically portrayed as follows:



Description (Continued)

(1) Training structure is portrayed in a training outline which ---

(a) Is a working document, allowing flexibility to modify training materials or products.

(b) Shows how all learning objectives will be trained and evaluated.

(c) Provides mandatory training sequence, i.e., a logical order for presenting the lessons, learning objectives, and learning steps/activities.

(2) When complete, the training structure and sequence are detailed in a course map, a graphic portrayal of a course's presentation.

Note: Other product training outlines (e.g., audiovisual (AV) product storyboard; tank table) have the same basic requirements but differ in format from resident training course outlines.

Outputs

b. The major outputs of this design function are ---

(1) Training structure/outline (phases, modules, lessons, tests, etc).

(2) Mandatory training sequence.

(3) Course map.

Note: A supporting product that may be produced is a matrix showing dependent relationships among tasks, skills and knowledge, and learning objectives.

Procedure

c. The activities involved in structuring and sequencing training are as follows:

Step	Activities
(1)	Identify and sequence phases.
(2)	Identify and sequence modules. ***Note 1:*** The course structure could include phases, tracks, and modules using different media that can be used in-house or for DL. ***Note 2:*** A module (subcourse) is a grouping of lessons in an approved course of instruction; it could consist of a single lesson (e.g., for distance learning) or multiple lessons. The term is synonymous with "annex" and "subcourse." ***Note 3:*** Some modules may be created and presented as tracks that train specific items of equipment to the RC or AC soldiers based on equipment assigned to their units. ***Note 4:*** See Sample Course Structure below.
(3)	Establish the technique(s) of delivery for each module.
(4)	(a) Establish and sequence the lessons (i.e., TLOs). (b) Ensure task skill and knowledge training is progressive and sequential: skills and knowledge trained at lower skill levels are not retrained at higher skill levels except as reinforcement training. *Note:* See Chapter VI-4, Individual Training Design, Part 3 of the Career Development Model.
(5)	Sequence the ELOs (if used).
(6)	Sequence the learning steps/learning activities.

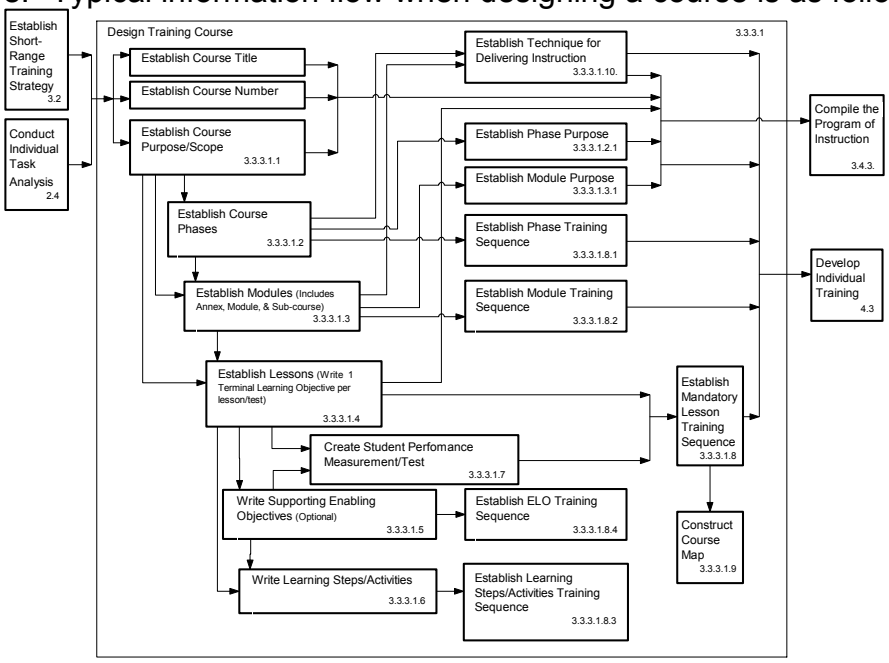
Mobilization Training Considerations

d. Take the following factors into consideration when designing the mobilization version of the training course. Include training of ---

(1) Tasks taught only in the unit during peacetime.
(2) Distance learning modules at the resident training or mobilization site.
(3) Tasks specific to the soldier's assignment.
(4) Tasks on systems/equipment the soldiers will be using in their assignments.

Course Structure Flow

e. Typical information flow when designing a course is as follows:



Sample Course Structure

f. A **sample** Proposed TATS Course Structure with phases, modules, and lessons would look something like the following. Proponents should select the best media for total Army training.

	Phase 1: Common Core (x hours)								***Phase 2: Branch (x hours)***										***Phase 3: Branch***							
	Module A:					Mod B:					Mod A:				Mod B:				Mod C				*Track 1 (x hours)*					
Technique of Delivery:	CBI					Small Group Instruction					Group-paced Instruction				VTT				Group-paced Instruction				Mod A				Mod B	
Methods of Instruction:	Programmed instruction, PE; & Test					Conf & Demo					Conf & Demo				Conf & Demo				PE (FTX)				Conf				PE; Demo; & Test	
																							Track 2 (x hours)					
																							Track 3 (x hours)					
Lessons:	L 1	L 2	L 3	-	L n	L 1	L 2	L 3	-	L n	L 1	L 2	-	L n	L 1	L 2	-	L n	L 1	L 2	-	L n	L 1	L 2	L 3	L 4	-	Ln
Training Site:	***AC***	DL remote				Resident (Proponent School)					Resident (Proponent School)				Resident (Proponent School)				Resident (Proponent School)				Track 1: Resident (Proponent School)					
	RC	DL: 1: (IDT) 2: (Remote)				Resident (AT/ADT)					Resident (IDT)				DL (non-resident IDT)								Track 2: Resident (AT/ADT)					
																							Track 3: Resident (Proponent School, AT/ADT, or IDT)					

Sample Course Structure

(Continued)

The above estimated course structure shows a course divided into phases with estimated hours, modules identified by techniques of delivery and methods of instruction, lessons per module, and AC/RC training sites.

Phase 1: The sample shows Common Core as Phase 1.

Module A: Pre-resident CBI (technique of delivery) implementing programmed instruction, practical exercise, and test (methods of instruction); trained as DL to the AC as non-resident (remote) instruction and to the RC both as IDT and remote instruction.

Module B: SGI (technique of delivery) implementing conference and demonstration (methods of instruction); trained at the proponent school and at the TASS Training Battalions during AT/ADT.

Note 1: All courses will not have a common core. Also, all courses do not have to have more than one phase.

Note 2: DL can be accomplished during AT/ADT, IDT, or outside of formal AT/ADT or IDT as non-resident (remote), self-paced training. Non-resident DL is limited to a total of 75 hours (approximately 2 hours per week) during a TATS Training Year.

Note 3: Common core can also be integrated into the branch/technical phases.

Note 4: Distance learning will not be used to present IET because of the
criticality of the regimented, phased soldierization process.
However, IMI, (e.g., Computer Based Instruction (CBI)) may be presented at the IET training site to reduce training time, reduce safety hazards, and improve performance standards.

Phase 2:

Module A: SGI (technique of delivery) implementing conference and demonstration (methods of instruction); trained at the proponent school and at the TASS Training Battalions during IDT.

Module B: VTT (technique of delivery) implementing conference and demonstration (methods of instruction); transmitted from the proponent school during resident instruction and transmitted to TASS Training Battalions during AT/ADT.

Note: Instruction also can be taped and sent to other training institutions.

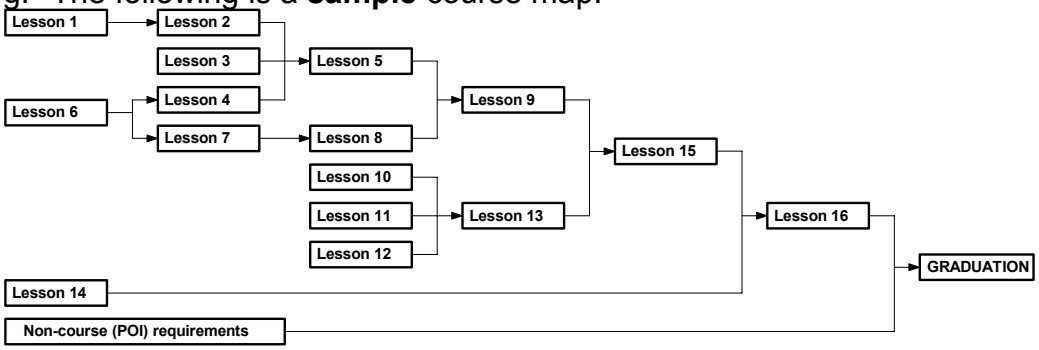
Module C: Group-paced instruction (technique of delivery) implemented as a field training exercise (FTX) (method of instruction); trained only at the proponent school.

Phase 3: The sample shows three tracks for Phase 3. Tracks can be used to meet TASS Training Battalion equipment requirements and training-on-demand requirements.

Mobilization: All critical tasks must be trained in the peacetime POI. Peacetime training continues upon declaration of partial mobilization. Additionally, refresher training for mobilized members of Individual Ready Reserves is also conducted at proponent schools.

Course Map Sample

g. The following is a **sample** course map.



Sample Training Schedule

h. Some of the possible training schedules based on the preceding sample course map are as follows ---

Schedule	Lesson sequence
A	1, 2, 3, 6, 4, 5, 7, 8, 9, 10, 11, 12, 13, 15, 14, 16, graduation
B	6, 7, 4, 1, 2, 3, 5, 8, 9, 10, 11, 12, 13, 15, 14, 16, graduation
C	14, 6, 1, 2, 3, 4, 7, 5, 8, 9, 10, 11, 12, 13, 15, 16, graduation
D	10, 11, 12, 13, 1, 2, 3, 6, 4, 5, 7, 8, 9, 15, 14, 16, graduation

Quality Control

i. To ensure quality training sequence, the individuals involved in structuring the training and establishing the sequence must ensure the training sequence provides ---

(a) Progressive learning/training.
(b) A viable course map.

VI-6-8. Learning Steps/Activities Descriptive Details

Description

a. Learning steps/activities are the actions the student must learn in order to perform the supported objective to the established standard. They are scheduling events for scheduling purposes and ---

(1) Provide a structured means to focus student learning on a small part of what they need to learn.
(2) Are developed for each learning objective. Conversely, there should be no learning step/activity in a lesson that does not directly support a LO.
(3) Are normally written in student action terms, i.e., they begin with a verb.

(4) Are sequenced to maximize learning.
(5) Provide the basis for identifying the learning step/activity specifications.
(6) Are included in the lesson outline.

Note: Learning steps/activities serve the same purpose for a self-paced lesson (e.g., IMI), but some of the specific actions may not be required (e.g., instructor/student ratio).

Outputs

b. The result will be sequenced learning steps/activities with identified ---
(1) Methods of instruction.
(2) Media.
(3) Time requirements.
(4) Instructor-to-student ratio.
(5) Resource requirements, etc.

Examples

c. Examples of learning steps/activities are as follows:
(1) Demonstrate an ability to perform the TLO.
Note: This will function as a test with a method of instruction code "TE."
(2) Participate in the performance exercise AAR.
(3) Remain afloat in a swimming pool for 1 hour with the use of a life jacket.
(4) Load an M-16 rifle.

Learning Step/Activity Specifications

d. The training developer identifies or establishes the specifications for each learning step/activity in a lesson. These specifications are the foundation for the lesson plan, establishment of the training schedule, compilation of the program of instruction, and resource acquisition. List the learning step/activities in presentation order. Specifications: are as follows:
(1) Method of instruction (see Appendix H, Methods and Techniques for Delivering Instruction.
(2) Instructional media (video tape, IMI, 35 mm slides, etc.) List media name and identification number, if available.
Note: Length and use of full motion video should be limited **ONLY** to when it is absolutely essential to show motion to accomplish the training objective.
(3) Instructional time (in minutes).
(4) Instructor/student ratio.
(5) Instructor and student-to-equipment ratio.
(6) Environmental considerations.
(7) Safety factors and hazards.
(8) Risk assessment code.
Note: See Chapter I-2, Safety and Environment, for environmental, safety, and risk assessment requirements.
(9) Security requirements.
(10) Training resource requirements.

Note: See "Resource Identification" (this chapter).

(11) References required (to paragraph level).

(12) Student handout requirements.

Instructor/ Student Ratio

e. The instructor-to-student ratio is determined when designing the training based on the technique(s) of delivery and method of instruction (see Appendix H, Methods and Techniques for Delivering Instruction, for complete lists, including definitions and abbreviation codes).

(1) There are no established, standardized instructor/student ratios. This ratio is established by the training designer based on a number of factors. These include but are not limited to ---

(a) Number of students an instructor/facilitator can adequately manage, e.g.:

1 The maximum number of students a classroom instructor can manage for conduct of a discussion lesson is 25 (1:25).

2 A cockpit checkout requires one instructor per student (1:1).

(b) Restrictions imposed by the equipment. For example:

1 Interior size of a tank.

2 Noise in a ship engine room.

(c) Safety factors. For example:

1 Training a SCUBA diver in a dive tank may require one instructor per 2 students (1:2).

2 Training a soldier to throw a live grenade requires one instructor per student (1:1).

(d) Facility limitations. For example:

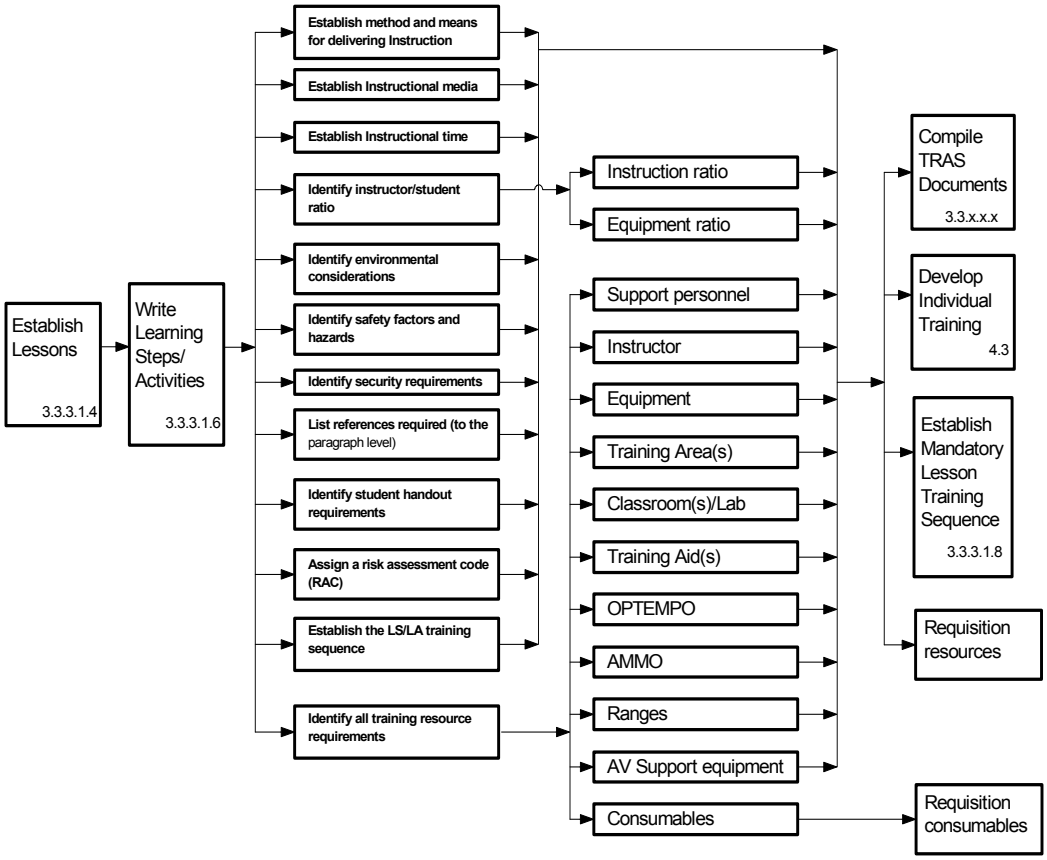
1 Capacity.

2 Utilities.

(2) **DO NOT** ask for an instructor/student ratio lessor or greater than is required.

(3) The instructor-to-student ratio is published in the POI and verified by the TMA. Disagreement between the training proponent and TMA will be resolved upon proponent rebuttal by HQ TRADOC, Director, Training Operations Management Directorate (ATTN: ATOM-P), Fort Monroe VA, 23651.

Process Flow f. Typical learning step/activity information flow is as follows ---



Quality Control g. Quality learning steps/activities depend on design personnel ensuring ---

(1) The learning steps/activities:

(a) Unquestionably support the learning objective.

(b) Are sequenced to maximize learning.

(c) Use the most effective training techniques available within existing resource constraints.

(d) Are critical for student mastery of the task, skill, or knowledge being trained (i.e., do not cover nice-to-know information).

(e) Involve active learning.

(2) All required learning step/activity specifications are identified.

VI-6-9. Resources Identification

Description a. All resources required to conduct the training are identified when designing that training. This normally occurs when creating the learning step/activity. There may be additional resource requirements to support an entire course. Total training resource requirements are compiled and included in appropriate training plans, POI, and TSP.

Outputs b. The output of this design step is a listing of all resource requirements, including ---

(1) Instructors.
(2) Support personnel.
(3) Classrooms.
(4) Training areas.
(5) Ammunition.
(6) OPTEMPO.
(7) Printing and reproduction.
(8) Range, and other facilities (Military Construction Army (MCA) projects, etc).
(9) Equipment (weapons, audiovisual, radios, etc.).
(10) Equipment support (maintenance, transport, etc.).
(11) Setup (e.g., miles, flight hours) *(optional)*.

Process Flow c. See "Learning Step/Activities Descriptive Details" (this chapter).

Quality Control d. For quality training, design personnel must ensure all ---
(1) Resources required to perform each learning step/activity are identified.
(2) Resource shortfalls and impact on mission accomplishment are identified and brought to command attention.

VI-6-10. Lesson Outline

Process Description a. The lesson outline is the basic building block of all training. It is designed to facilitate learning. It may be completed as a lesson plan for formal institutional training or as a lesson in a correspondence course or distance learning product.

Outputs b. The primary lesson design outputs are as follows:
(1) Detailed lesson outlines that include ---
(a) Learning objectives.
(b) Learning steps/activities.
(c) Methods of instruction.
(d) Delivery techniques.
(e) References.
(f) Media selection.
(g) Length of training.
(h) Training sequence.
(i) Security requirements.
(j) Resource requirements.
(2) Criterion-referenced tests with grading criteria.
Note 1: Tests may be a part of a lesson or a separate lesson.
Note 2: A practical exercise may serve as a test. It should be identified by the method of instruction "TE" for POI purposes. Practical exercise/laboratory sheets describe the practical exercise that the student is to perform. They provide instructor and/or student guidance for exercise performance.
(3) Student performance evaluation procedures.

(4) Home study, practical exercise, student handouts, and other student assignment requirements.

Note Only assign home and pre-attendance studies that are essential to follow-on training. All home and pre-attendance studies are testable.

Standard Format

c. The lesson outline is the foundation for the lesson plan, common/shared task TSP, TATS Course TSP, and CBI lessons. This information is a direct input to the POI.

(1) The lesson outline includes the ---
- (a) Lesson title and number
- (b) Task(s) taught, supported, and/or reinforced
- (c) TLO.
- (d) ELO (if applicable).
- (e) Learning steps/activities.
  - 1 Method of instruction.
  - 2 Instructor to student ratio.
  - 3 Time of instruction (minutes).
  - 4 Media (state if there is none).
  - 5 References.
  - 6 Security Classification.
  - 7 Resource requirements
- (f) Lesson academic hours.
- (g) Testing requirements.

(2) Use the HQ TRADOC TD automation system (currently ASAT) to develop the lesson outline.

Start Point

d. Lesson design starts with receipt of task performance specifications for the critical task identified in the short-range training strategy for formal institutional instruction.

Procedure

e. Follow the procedures below when designing a lesson:

Step	Action
(1)	Acquire the task analysis data for the tasks and/or supporting skills and knowledge to be trained in the lesson being designed.
(2)	Write one TLO per lesson. ***Note:*** See "Learning Objectives (LO) Descriptive Details" (this chapter).
(3)	Sequence the TLOs to provide for sequential, progressive training.
(4)	Write (as needed) and sequence the ELOs. ***Note:*** See "Learning Objectives (LO) Descriptive Details" (this chapter).

(5)	(a) Establish how student performance of the LOs will be evaluated. (b) Write the criterion-referenced test items that --- 1 Match the action, conditions, and standards of the terminal and supporting enabling learning objectives. 2 Ensure the student can accomplish the learning objectives under the stated conditions to the established standard. ***Note:*** See Chapter VI-7, Student Performance Measurement/Testing.
(6)	Write learning steps/activities. Include --- (a) Learning step/activity specifications. ***Note 1:*** See "Learning Steps/Activities Descriptive Details" (this chapter). ***Note 2:*** Using media other than viewgraphs or 35mm slides will appreciably increase the development effort and may necessitate the use of special equipment. (b) Reinforcement training requirements. (c) Sequence the steps to provide for sequential/progressive training.
(7)	Determine and assign a risk assessment code to the lesson. Also assign a risk assessment code to any learning step/activity if deemed necessary.
(8)	Incorporate safety notes and cautions and environmental factors and considerations at the appropriate position in the lesson.
(9)	Obtain appropriate command authority approval.

Procedure (Continued)

Note: Lesson design and development functions may be conducted simultaneously. Great care must be taken when this approach is taken to ensure the lesson is built on and reinforces previous training as appropriate. The design must also provide for vertically aligned training, i.e., training at the higher skill level is built on and reinforces previous training as deemed necessary.

Completion f. The lesson design is considered complete when approved for development by the appropriate proponent authority.

Quality Control g. For a quality lesson outline, each involved individual must ensure ---

(1) The lesson is designed based on sound training/TD principles:

(a) Design and development are consistent with the analysis data.
(b) The ELOs support the TLOs.
(c) The conditions are fully specified.
(d) Learning objectives are correctly written.
(e) The learning steps/ activities support the LOs.
(f) TSP training is feasible and cost-effective.
(g) Training sequence is effective.

(h) Training is sequential and progressive.
(i) Test items and tests meet testing standards.
(2) Technical accuracy of content.
(3) Identification and correction of deficiencies.
(4) Incorporation of safety, risk, and environmental factors and considerations.

TR 350-70, Ch VI-7.

Student Performance Measurement/Testing

VI-7-1. Chapter Overview

Introduction a. This chapter provides student testing policy and guidance for the management,
development, review, control, and evaluation of student tests.

Chapter Index b. This chapter covers the following:

Content	Paragraph
Administrative Information	VI-7-2
Performance Measurement/Testing	VI-7-3
Test Types and Uses	VI-7-4
Student Evaluation Plan	VI-7-5
Test Design and Development	VI-7-6
Test Control	VI-7-7
Test/Test Item Analysis	VI-7-8

VI-7-2. Administrative Information

Purpose a. Tests are used for evaluating individual training in resident and extension training. Their purpose is to ---
(1) Ensure students can accomplish or have learned what they were supposed to accomplish or learn.
(2) Ensure students are qualified prior to ---
(a) Commencement of training (ensure prerequisites are met).
(b) Progression to the next training level, phase, etc.
(c) Graduation from the training.
(d) Award of a Military Occupational Specialty (MOS), Additional Skill Identifier (ASI), Area of Concentration (AOC), Language Identifier Code (LIC), etc.
(3) Accurately assess student achievement against established, preset standards (criterion referenced testing).
(4) Improve training by ---

(a) Validating the effectiveness of training.
(b) Identifying areas within training that needs improvement.
(c) Motivating, challenging, and encouraging students to learn.
(5) Confirm or certify as appropriate that the student is competent in the job (can perform tasks to established, preset standards).
(6) Focus training where it is needed and save training time and resources by ---
(a) Providing a means to test-out of portions of or all of a course.
(b) Enabling unit training to concentrate on identified soldier performance deficiency(ies).
(c) Enabling an individual to concentrate on personal performance deficiency(ies) for self-development purposes.
(7) Assist in determining training effectiveness.
(8) Assist in determining if training teaches what it is supposed to teach.

References b. Required **regulatory** guidance:
(1) TRADOC Reg 351-18, Total Army School System
(2) Other chapter, this regulation, Chapter VI-6, Training Course Design

Definitions c. See Glossary for TD-related terms. Terms specific to student performance measurement/testing are as follows:

- Test
- Validity
- Reliability
- Content validity
- Predictive validity
- Criterion-referenced test
- Norm-referenced test
- Written performance test
- Hands-on performance test
- Performance-based test
- Testing out
- Discrimination
- Pretest
- Placement test

Responsibilities d. See Appendix B, Responsibilities, for top-level responsibilities. The following responsibilities pertain specifically to student performance measurement and testing:

Activity	Responsibilities
(1) HQ TRADOC, Deputy Chief of Staff for Training (DCST)	Provides student measurement/testing policy and guidance. (ATTG-CD)

(2) Commander, Army Training Support Center (ATSC)	(a) Determines reliability and validity of correspondence course tests and test items. (b) Notifies proponent schools of correspondence course tests and test items reliability and validity results. (c) Provides assistance as required to the DCST or Training/TD (Task) Proponents in the --- 1 Establishment of the standards for test development. 2 Provision of criterion-referenced performance test development training as part of the Staff and Faculty Development Programs. 3 Development of test and test item analysis standards and procedures.
(3) Commanders/ Commandants, Training/TD (Task) Proponents	(a) Determine testing requirements and types of tests that will accomplish the purpose for testing, and develop a test plan (see paragraph "Test Plan"). (b) Develop a student evaluation plan for each training course. (c) Design and develop criterion-referenced, performance or performance-based tests to determine student competency and ensure student can accomplish the objectives. 1 Include considerations for risk management, fratricide prevention, and environmental protection when designing tests. 2 Maintain a pool of test items sufficient to develop at least two versions of each test. 3 Prepare a test administration guide for each test to standardize test administration. (d) Maximize use of pretests (diagnostic) for testing-out to minimize training length. Build pretests into every CBI program. (e) Include time in resident training to review the test with students. (f) Provide testing materials directly to appropriate course managers for training implemented at training institutions other than the proponent school, e.g., managed through the TASS training battalions or presented at another TRADOC school.

Responsibilities (continued)

Activity	Responsibilities
(3) Commanders/ Commandants, Training/TD (Task) Proponents (continued)	(g) Analyze tests and test items to ensure they are reliable, valid, and that they discriminate between student performance levels. (h) Implement the appropriate level of test and test item control. See "Test Control," this chapter. To accomplish this, proponents will --- 1 Maintain security of all test items, tests, test administration instructions (if necessary), checklists, scoring keys, and test results during test development, transmittal, storage, retrieval, and administration consistent with the appropriate level of test control as determined by applying the guidelines in "Test Control," this chapter. 2 Develop and specify in a lesson plan, Test Administration Guide, the Student Testing Plan, and/or separate Test Control Standard Operating Procedure (SOP) (if desired) the exact procedures to be followed during resident test administration to ensure the proper level of test control. 3 Regardless of how final test/test items will ultimately be administered, restrict access to paper-based copies of proposed or final test items, scoring/answer keys, or test results to those personnel demonstrating a valid need for the information. 4 As necessary, develop and specify, in conjunction with information management specialists, procedures to ensure electronic copies of tests/test items and scoring/answer keys are protected from unauthorized disclosure. These procedures ---

a Must include ---	b May include ---
Restrictions on access, reproduction, and distribution.	Authentication methods.
Password protection.	Encryption technologies.
Required student certifications. See "Test Control," this chapter.	System intrusion detection/ prevention.

	5 Immediately investigate and reduce the impact of test/test item compromises or suspected compromises. 6 Ensure the test is administered exactly IAW the test administration instructions. 7 Ensure test control procedures include a method to determine with reasonable assurance the identity of the test taker. ***Note:*** Proponents do not have to follow the procedures outlined in AR 611-5 for security and control of test items but may use these procedures as guidelines for developing their specific procedures consistent with the level of control required.

VI-7-3. Performance Measurement/Testing

Description a. Performance Measurement/Testing is an integral part of the training program. To effectively evaluate student performance and training effectiveness, tests ---

(1) Will be used to ---

(a) Determine if training does what it is designed to do.

(b) Evaluate student performance.

(c) Assess individual competency.

. (2) Will be ---

(a) Designed, developed, and presented as an integral part of the training to optimize learning and eliminate unnecessary training.

(b) Written when designing the training to ensure measurement of the lesson objective performance to the prescribed standard.

(3) Can be administered using actual equipment, simulated hands-on equipment, or pencil and paper (when the performance involves application of mental processes, e.g., calculation of an azimuth).

Methods of Testing b. Two primary methods are used to test students:

Method	Description/Use
(1) **Hands-on performance tests**	Requires students to prove competency by using actual equipment, materials, simulators/simulations, or training aids to perform the required learning objective.
Note: This is the preferred method of testing and will be used to the greatest degree possible.	
(2) **Performance-based (written) tests**	Used to assess the student's ability to apply facts, principles, procedures, etc., required to perform the learning objective. Essay, short answer, and multiple-choice questions (in order of preference and effectiveness of measurement) can be question types for performance-based tests.

Note: Due to their reduced fidelity and resultant lower predictive validity, performance-based tests should be used **only** when the availability of equipment, safety, or other severe constraint precludes performance testing. All performance-based (written) tests should be a valid measure (predictor) of task performance. See paragraph "Predictive Validity," this chapter.

Note: Knowledge can be tested in the context of the (prerequisite) skills/knowledge required for performance. Prerequisite knowledge testing is the most appropriate use for written tests.

What to Test

c. All training content taught, including home study assignments, is subject to testing to ensure instruction is effective and efficient.

Note: Training content not important enough to test is not important enough to teach. The Army cannot afford the time to develop or present "nice-to-know" training.

Determining Class Standing

d. Determining class standing ---

(1) Is **not** a testing function.

(2) Is **not** required by TRADOC.

(3) May be accomplished by procedures and policies established by the individual schools.

Outputs

e. **Minimum essential requirements** for performance measurement/test development are marked with an asterisk:

(1) ***** Valid, reliable test items/tests.

(2) * Criterion referenced tests.

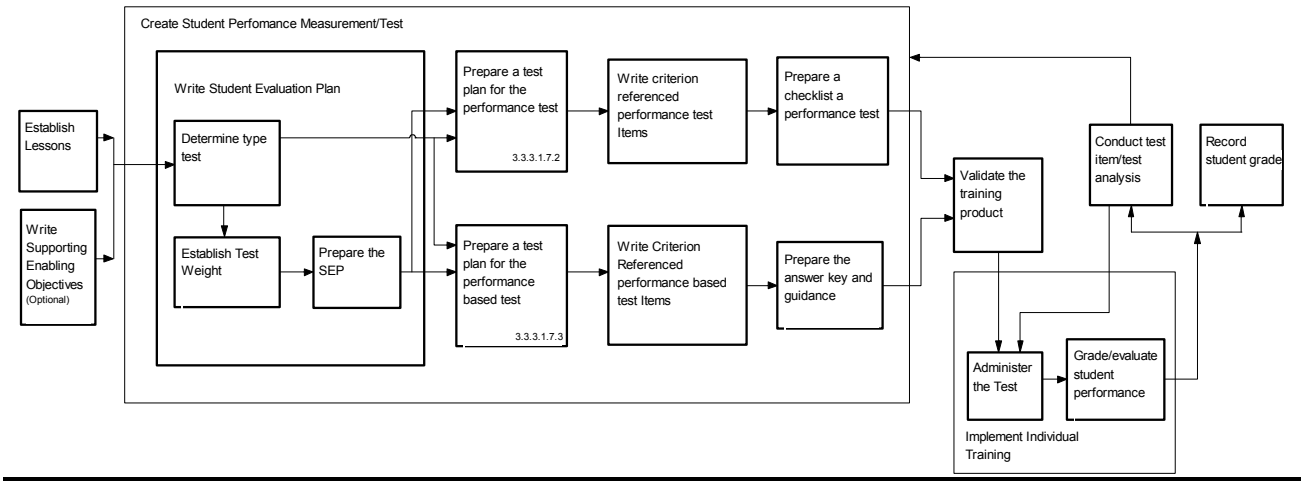
(3) * Student Evaluation Plan.

(4) * Checklists/Scoring key.

(5) Test item analysis data.

Flow Diagram

f. The relationship between test design, development, implementation, and evaluation is as follows:



Quality Control

g. To ensure a quality testing program, all involved individuals must ---

(1) Ensure criterion-referenced test items ---

(a) Meet (match) the conditions of the terminal learning objective.

(b) Call for the same behavior as the terminal learning objective.

(c) Measure performance against the terminal learning objective standard.
(d) Contain a rating/scoring device that is applicable and appropriate to the behavior being assessed.

(2) Ensure the Student Evaluation Plan ---
(a) Details how the course proponent will determine if the student has demonstrated a sufficient level of competency to pass the specified course or training.
(b) Establishes the training completion/graduation criteria/requirements.
(c) Delineates school/course counseling and retesting policy and procedures.

(3) Apply test/test item analysis results.

Note: See Test/Test Item Analysis (this chapter).

VI-7-4. Test Types and Uses

Test Types a. The two major types/categories of tests are ---
(1) Criterion-referenced tests: Determine if students can perform to established, well-defined training standards or criteria.
Note: Criterion-referenced tests are performance and performance-based tests.
(2) Norm-referenced tests: Compare a student's performance with the performance of other students (or the norm).

Criterion Referenced Tests (CRT) b. TRADOC and associated service schools must use criterion-referenced tests to determine student competency and to determine if the training program or lesson trains individuals to standard. **A criterion-referenced test ---**

(1) Measures an individual's ability to successfully perform the action specified in the Learning objective. The student's performance is compared to the learning objective standard.
(2) Should establish whether the student has mastered the supporting skills and knowledge required to perform the learning objective.
(3) Determines if the proficiency level required for a student to continue successfully to the next block of instruction has been met.
(4) Is scored based upon absolute standards rather than upon relative standards, such as class standings.
(5) Provides student scores/grades as "GO" (pass)/"NO GO" (fail).
(6) Will allow classification of individual students into two groups:
(a) **Performers:** Students **who can** (reasonably be expected to) do what they were trained to do.
(b) **Non-Performers**: Students **who cannot** adequately do what they were trained to do.
(7) Can be used as a diagnostic tool. It provides an instrument to determine the current or entry level performance capability of a student. This can provide the start point for follow-on training and allow for testing out of sections or entire course if the student can

demonstrate required performance.

CRT Examples

c. Course tests may be located anywhere in a course. Normally, there is not a requirement for a specific test to be administered at a specific point in a course. Test requirements are established by the Training/TD (task) Proponent.

Course tests ---	
(1) Will be designed to ...	(a) Support sequential, progressive training. (b) Measure performance trained since the previous test. ***Note:*** May include material from earlier training in the course for reinforcement, etc.
(2) May be an ...	(a) End-of-Course (b) End-of-Phase. (c) End-of-Module (subcourse).
(3) May cover ...	(a) Part of a lesson. (b) One lesson. (c) Multiple lessons.
(4) May be designed as a/an ...	(a) Stand alone lesson. (b) Integral part of a lesson (a learning step/activity).

Norm-Reference Tests

d. Norm-referenced tests measure an individual's performance against the performance of other individuals taking the same test. The norm-referenced test ---

(1) Usually provides the student's grade/score as a percentage.
(2) Does **not** establish if the student can perform a specific task or learning objective to the established standard. Norm-referenced testing ---
(3) Is useful for making relative decisions, such as who knows more or who works more quickly.
(4) **Will NOT** be used to measure student performance in Army training.

Note: TRADOC proponent schools must test students to determine if they can perform to established standards. They **must not** test students simply to see how they compare to each other.

Test Uses

e. The following matrix provides information on types/use of some tests.

Test-	Description/Usage
(1) Pretest (diagnostic)	Measures soldier or civilian task competency before training; measures performance against a criterion; focuses training on what soldiers/civilians need to be able to do; and provides links to this prescriptive training. As a placement test, it allows for testing out of lessons, modules, or phases of a course. The pretest is used ---

Test Uses (continued)

Type of Test-	Description/Usage
(1) Pretest (diagnostic) (continued)	(a) **by institutions** to **...** 1 Determine the student's current proficiency as it relates to the training to be presented. 2 Allow a student to test out of a part of or a complete course. 3 Prescribe follow-on training. a Self-paced training, e.g., CBI includes branching techniques and pretests in the program that lead the student through the training by eliminating unneeded training and presenting only training needed by the student. b Group-paced training. Course manager will manage use and assignment of students testing-out of a part of a resident group-paced course. 4 Determine if student meets training prerequisites. (b) **by units** to **...** 1 Assess individual readiness and what training, if any, is needed. 2 Determine if an individual needs training prior to a new duty assignment. (c) **for self-development** by an individual to identify personal performance deficiency(ies) which need correcting (training) prior to taking on an additional duty or new duty assignment.
Note: A pretest (diagnostic) **should** be developed and administered for all appropriate training. It will be developed and administered when the proponent intends to use the results to tailor or improve training, allow testing out of training, determine self development requirements, etc., as appropriate.	
(2) End-of-course test	(a) Evaluates a student's accomplishment of all learning objectives presented in the course. (b) **Is NOT required** for any TRADOC-produced/managed course. (c) **Will NOT be required** unless there is a specific, educational requirement for that test.
(3) End-of-phase test	(a) Evaluates a student's accomplishment of all learning objectives presented in the phase. (b) Is recommended for courses structured where there is a significant time gap between the phases or there is a major change in training focus between phases. (c) **Is NOT required.**

(4) Module (subcourse) test	(a) Used to ensure students can competently perform the learning objectives of a specific module (subcourse). (b) **Is NOT required.**

VI-7-5. Student Evaluation Plan

Purpose

a. The Student Evaluation Plan ---
(1) Establishes student responsibilities.
(2) Establishes training graduation (pass/fail) criteria.
(3) Details how the course proponent will determine if the student has demonstrated a sufficient level of competency to pass the specified course or training.
(4) Lays out the course testing strategy to evaluate the student on the training.

Requirements

b. A Student Evaluation Plan ---
(1) Must be developed for each training course.
(2) Informs students, instructors, and other personnel of graduation requirements.
(a) A copy of the Student Evaluation Plan must be provided and explained to each Initial Entry Training (IET) student at the beginning of each course.
(b) A copy of the Student Evaluation Plan must be explained to all other trainees at the beginning of each course and posted for the students' reference.
(3) Must reflect TRADOC testing policy.
(4) Must be included in the TATS Course Training Support Package (TSP).

Procedure

c. The general steps involved in writing the Student Evaluation Plan are as follows:

Step	Action
(1)	Establish policies and procedures which state student responsibilities.
(2)	Establish how the proponent school will determine if the student has demonstrated a sufficient level of competency to pass the specified training course.
(3)	Detail how the student's performance will be evaluated.
(4)	Identify all course tests.
(5)	Establish weight points for each test.

(6)	Establish course completion/graduation requirements. (a) Establish "GO/NO GO" requirements for each performance test based on the tasks standards that the training is based upon and the learning objectives for the training. (b) Establish minimum passing score for each performance-based test using the learning objective standards, the performer/non-performer discrimination (i.e., as determined from test validation), and/or expert opinion analysis. (c) Establish final grade requirements. (d) Establish minimum course attendance requirements. (e) Identify specific tests that must be satisfactorily completed to graduate.
(7)	Establish testing procedures: (a) Delineate school/course policy for academic and/or non-academic probation. (b) Delineate school course policy for academic and/or non-academic relief/recycle policies. (c) Include a flow chart to depict the relief/recycle process .
(8)	Define sustained poor performance (if applicable).
(9)	Include affiliation grade, college credit, or American Council on Education (ACE) information (if applicable).
(10)	List specific lessons tested in each test/evaluation.
(11)	Delineate counseling policy.
(12)	Delineate remedial training policy.
(13)	Delineate reteaching/retesting policies and procedures.
(14)	Delineate pretesting (testing out) procedures. ***Note:*** Testing-out is built into CBI programs.
(15)	Establish test-challenging procedures.
(16)	Identify other evaluation requirements, such as the Army Weight Control Program and Physical Fitness Test, and define the impact of each on course completion/graduation.

Weight Point Description and Assignment

d. Weight points are a means of identifying which lessons, tests, learning objectives, etc., are more or less important in relation to the total training program.

(1) Weight points will be assigned to each test according to the importance of the test to job performance.

(2) A scale of 0 to 1000 is often used. Weight point distribution will be shown in the student evaluation plan.

(3) Assigning weight points can be made objective by having several subject matter experts independently assign a weight point value to each item, learning objective, or test being ranked, then averaging the results. The average value is assigned to the item.

Sample e. See Appendix I for a sample Student Evaluation Plan.

Note: The sample Student Evaluation Plan is just a guide. Proponent schools may modify the plan to meet their specific needs. It is important that the plan details exactly what the student must do to satisfactorily complete the training.

Completion f. The Student Evaluation Plan is considered complete when approved for implementation by the appropriate command authority.

VI-7-6 Test Design and Development

Description a. Individual test design and development consists of ---

(1) Designing and developing tests to meet Student Evaluation Plan requirements.

(2) Producing a test plan for each test.

(3) Constructing the test items.

(4) Validating the test items.

(5) Determining the "GO/NO GO" (pass/fail criteria) requirements (i.e., "passing" scores for performance-based tests or the "GO/NO-GO" criteria for performance tests) for each TLO/ELO.

(6) Writing the test control/administration instructions.

Start Point b. Test development begins immediately following learning objective development.

Procedure c. Test design and development is part of the course design phase of the training development process. The following are the general steps involved in producing a test.

Note: The listing of the following steps does not necessarily imply a fixed sequence. Some steps may be performed concurrently.

Step	Action
(1)	Review the terminal and enabling learning objectives (TLOs and ELOs). ***Note:*** TLO/ELO development is accomplished during the design phase. See Chapter VI-6, Training Course Design.
(2)	After review of the learning objectives, determine whether performance or performance-based items can/will be used to test each TLO/ELO selected for testing.
(3)	Determine if application, analysis, or problem-solving test items are required. ***Note:*** Unless you are testing prerequisite skills/knowledge (normally these are ELOs not TLOs), do **NOT** test at the recall or recognition level. Skills/performances should be tested at the application level or above.
(4)	Determine the quantity, type, and weight of criterion-referenced test/test items that will be used for each TLO/ELO: hands-on performance, written performance-based, or a combination of the two.

Procedure (continued)

Step	Action	
(5)	**Write a test plan for …**	**By determining and documenting the …**
	(a) Performance tests	1 Type of measurement to be used (product, process, or both). 2 Resources required (e.g., time, manpower, costs of alternatives, equipment, facilities, environment). 3 Constraints (resources, safety, and environmental) and their impact. 4 Possible alternative performance conditions and which ones will be tested. 5 Number of successful repetitions of performance required to achieve a "GO" (if necessary). 6 Level of fidelity possible considering the above.
	(b) Performance-based tests	Number of items needed to adequately evaluate each TLO/ELO selected for testing.
	Note: See paragraphs "Checklist" and "Test Plan," this chapter.	
(6)	Establish the required level of test control. See "Test Control," this chapter.	
(7)	Write criterion-referenced test items that: (a) Match the action, conditions, and standards of the TLO and ELO taught. (b) Ensure the student can accomplish the learning objectives under the stated conditions to the established standard. (c) Discriminate between performers and non-performers. (d) Measure actual on-the-job performance to the maximum extent possible; i.e., maximize fidelity to actual performance. (e) Are highly interactive (for computer-based test items). (f) Collectively test each and every TLO.	
(8)	Check each test item to ensure --- (a) Content validity. (b) Accuracy, i.e., keyed (correct) alternative is doctrinally/technically correct and other alternatives/possible responses on a performance-based test are clearly incorrect. (c) Adherence to good item writing procedures. (d) Fairness (i.e., does not contain bias or confusion related to race, gender, or cultural differences).	
(9)	Establish the weight factor for lesson(s) included in each test.	

(10)	Write a separate test lesson plan or include the test as a learning step/activity in a lesson plan. ***Note:*** Follow Chapter VI-6, Training Course Design, for writing this lesson. ***Note:*** Provide test review time by including a test review learning activity.	
(11)	Write/update the Student Evaluation Plan. ***Note:*** See "Student Evaluation Plan" (this chapter).	
(12)	Compile the test/administrative instructions.	
(13)	**If it is a ...**	**Then ...**
	(a) Performance test.	Construct a check list.
	(b) Performance-based test.	Construct the scoring key.
(14)	Administer the test (for validation purposes) using the test administration instructions (draft).	
(15)	Validate the test (and test administration instructions) by ensuring it discriminates between performers and non-performers.	
(16)	Revise the test as needed using the validity and reliability results.	
(17)	Monitor the test results to identify problems which occur over time.	

Checklist

d. The following is a sample checklist excerpt. Use this form when designing criterion-referenced, **performance** tests to verify the competency of the student to perform the learning objective(s) being tested. If possible, develop at least two scenarios/situations for each performance test to provide for two versions of the test.

PERFORMANCE MEASURES (Sequence is scored.)	**GO**	**NOGO**	**CRITICAL**
1. Used head-tilt/chin-lift method to open mannequin's airway by --- a. Kneeling at mannequin's shoulders. b. Applying firm, backward pressure with palm of one hand on mannequin's forehead to tilt head backward while lifting mannequin's chin upward using the fingertips of other hand under mannequin's lower jaw. (NOTE TO SCORER: Score Performance Measure 1 as "**NO GO"** if soldier uses thumb to lift chin or presses into the area under the chin with fingers.)			YES
	CMTS:		

2. Checked for breathing within 3-5 seconds by --- a. Placing ear over mannequin's mouth to simulate listening for breath while looking toward mannequin's chest. b. Placing cheek over mannequin's mouth to simulate feeling for mannequin's breath on cheek. (NOTE TO SCORER: Tell the examinee, "**The victim is not breathing**".)			
	CMTS		
3. Gave breaths to ensure open airway by --- a. Gently pinching mannequin's nose closed using hand on mannequin's forehead. b. Taking a deep breath and forming an airtight seal with own mouth around mannequin's mouth. c. Giving two full breaths (of 1½ to 2 seconds each) while looking toward the chest and then simulating listening and/or feeling for air to escape from mannequin's mouth. (NOTE TO SCORER: Soldier should take a breath in between each full breath.)			YES
	CMTS		
4.- n			
	CMTS		
(NOTE TO SCORER: At this point, test both options for the procedure by giving information about the mannequin's condition. Tell the examinee, in any order, that --- - **"The mannequin's chest rose."** (Examinee must proceed to Performance Measure 8. Score Performance Measure 11 as "**NO GO"** if examinee does not proceed to Performance Measure 8.) - And then, **"The mannequin's chest did not rise."** (Examinee must proceed to Performance Measure 5. Score Performance Measure 11 as "**NO GO"** if examinee does not proceed to Performance Measure 5.)			

Test Plan

e. The following is a sample test plan. Use this form when designing criterion-referenced, **performance based** (written) tests to define the content of the test. This helps ensure that an adequate quantity of test items are developed and administered to determine the competency of the student to perform the learning objective(s) being tested. For **performance-based** (written) tests, develop **at least** two versions of each test by determining the minimum number of items needed to adequately test each TLO/ELO and then constructing at least twice that many items (to provide sufficient items for the required two versions).

Lesson/ TLO Number	ELO number (optional)	Learning step/activity	Quantity of Questions Needed For Coverage of ELO per Version	TOTAL Quantity of Questions For step	Total Quantity of Items For Two Versions
0001	0001 A	A-1	2	4	
		A-2	1	2	
		A-4	1	2	
		A-5	3	6	
		A-7	3	6	20
	0001 B	B-1	5	10	
		B-3	3	6	16
0002	0001 A	A-2	3	6	
		A-4	2	4	
		A-5	2	4	
		A-6	2	4	18

Setting Passing Scores

f. In most military testing situations, the **passing score for performance-based tests** should be set as high can be tolerated by the command considering resource constraints. This is because, in most military situations, ---

(1) We train only critical tasks, and

(2) The impact (i.e., possible mission failure or even death) of incorrectly identifying a student as a performer (a "false positive" error) far outweighs the impact (i.e., retraining/retesting and delay of human assets to units) of incorrectly identifying a student as a non-performer (a "false negative" error).

Note: The passing score for performance based tests are NOT usually set at 100% due to the possibility of poor test item construction influencing a student's response.

Exception To Testing Every TLO

g. Student performance measurement instruments/tests must correctly discriminate between performers and non-performers for each critical task to be trained. Since the TLOs are derived from the critical tasks, in most cases every TLO should be tested either directly or via their ELOs/learning steps. The exception to this rule is the case when the TLO is a step/skill/knowledge required to perform another TLO which is tested.

Automated Test/Test Item Development

h. Automated test/test item development provides an improved capability for the development, administration, control, and management of tests. It must provide the following features/functions:

(1) Direct linkage to learning objective.

(2) Immediate scoring and context feedback to the student.

(3) Automatic scoring, storage, and transmission of results.

(4) High interactivity.

(5) High fidelity.

(6) Proper level of test control. See paragraph "Test Control," this chapter.

Process Completion i. Documentation of the validated tests with scoring keys/checklists (including weight), **"**GO/NO GO" requirements/passing score for each TLO/ELO/learning step, the Student Evaluation Plan, and the test administration instructions constitutes completion of this step in the design process.

VI-7-7. Test Control

Description a. **Test control ---**

(1) Is the application of security measures to protect tests and test items and related sensitive material from unauthorized disclosure from the time of their creation until they become obsolete or are destroyed.

(2) Ensures each student has a fair and equal opportunity for successfully completing the test.

(3) Covers hands-on, automated, and paper-based testing.

(4) May vary based upon ---

(a) How the test is administered (hands-on, paper-based, or computer-based).

(b) The number of different test items which may be constructed to measure the TLO/ELO.

Philosophy b. The necessity for test control measures is greatly reduced by the implementation of criterion referenced, performance testing. The student must be told exactly what performance is required of him/her at the end of a training (i.e., via the TLOs/ELOs and Student Evaluation Plan), all training and practices must match these objectives, and performance tests/test items exactly match the performance required by the TLOs/ELOs.

Guidelines c. The following guidelines should be used for the control of tests:

If the test/test item …	Then the test/test item requires …
(1) Mirrors the task/TLO and must always be performed in exactly the same way (i.e., Disassemble the M16A1 rifle).	No security measures for adequate test control.
(2) Has only a few possible variations.	That all possible variations **MUST** be protected from unauthorized disclosure.
(3) Has many possible variations.	Security measures sufficient to avoid making known to the individual student the specific variation which he will receive. (i.e., due to its size, making known the entire domain of possible test items will not be detrimental to student testing).

Required Certifications d. No matter what type of test is used, the test **must** have a way for the student to certify that he/she ---

(1) Has received no unauthorized assistance in answering the test items or performing the test requirements, and

(2) Will not divulge the contents of the tests or test items (except in the case of a test/test item that meets the requirements of above paragraph, "Guidelines").

VI-7-8. Test/Test Item Analysis

Description a. Test item and test analysis is used to provide statistical data, such as difficulty, discrimination, validity, and reliability, to help make viable decisions concerning

(1) Test/test item improvement.
(2) Identification of student weaknesses.
(3) Direction for instructional change.

Procedures b. There are a variety of established procedures for analyzing criterion-referenced tests and test items. The specific procedures should be established by the proponent school.

Terminology c. Test item/test analysis terminology:

Note: There are a number of terms associated with test item/test analysis. These terms may be defined differently by different testing experts.

(1) **Test Validity**. The validity (of a test) is ---

(a) The extent to which the test measures what it is intended to measure and which the instructor can infer (judge, conclude, presume, assume) how well a student has attained the ability to perform the learning objectives.

(b) Is described by types/different classification schemes. Most important to test developers are content-related and predictive validity:

1 **Content-related validity**. Tests are intended to measure the extent to which students learn the content of the instruction. The extent to which the test measures the objectives is referred to as “content validity.” It:

a Determines if the test item actually measures the pre-determined criteria (the learning objective).

b Helps answers the questions “Is what is being tested what was taught?”; “Are both the instruction and the test(s) used to evaluate learning based on the same behavior (learning objectives)?”; and “Can the student perform the learning objective to the stated standard under the prescribed conditions?”

c Must be determined for all tests.

d Is established through use of the training development process.

Note Subject matter experts (SMEs) are the source for ensuring the test has content validity and must be very involved in the test development process.

2 **Predictive validity** is the extent to which the test predicts how well students will actually perform on the job. If a test has predictive validity, it will answer the question: "Will the students be able to perform on the job?" Writing learning objectives that reflect actual job performance is crucial to building in predictive validity. Also, determining predictive validity is accomplished, in part, by comparing test performance with a pre-defined set of criteria (expected job performance). Predictive validity is used to estimate future performance based on present test performance.

(2) **Test Reliability**:

(a) Is a measure of stability; it is the extent to which the test/test item gives consistent results each time it is used (i.e., it has reliability).

(b) Measures test ability to generate equivalent results under repeated trials.

(3) **Test Item Analysis:**

(a) Is used to determine the effectiveness, validity, and reliability of individual test items.

(b) Uses such techniques/data as distracter analyses, reliability coefficient, difficulty index, and discrimination index.

Note: The exact procedures used are left up to the individual proponent.

Validity/ Reliability Relationship

d. A measure that gives inconsistent results (i.e., is not reliable) can **NOT** give valid results. Any time a test item is examined for validity, it must also be examined for reliability.

TR 350-70, para VI-8-6

Warrior Training Support Package (TSP): Development and Submission for Individual Training, Continued

Outputs

b. Warrior TSPs are a *minimum essential requirement* if identified as a requirement during needs analysis or short-range individual training strategy. The primary individual TSP development output is an approved, validated TSP containing all the material required to implement the training at the training site. Its contents will vary depending on its type/use.

TSP Uses

c. The term “Warrior TSP” denotes the concept of future, computer-generated TSPs for individual training. A Warrior TSP is a package of training products/materials necessary to train one or more critical individual tasks anywhere in the world, to include in the institution, at the unit, or in a soldier’s home. Training may be conducted using formal instruction, self study, or distance learning in a live, virtual, or constructive environment. Its automated components allow access of critical individual (including leader and battle staff) task specifications in support of Warfighter and Warfighter Modernization (WarMod) TSPs.

TR 350-18, para 4-5, Visitor folders.
Every class instructor will have at least one visitor folder at a table or desk in the rear of the classroom or field training area. These folders will include, as a minimum:

a. Visitors sign-in log.

b. Current class roster.

c. TASS training battalion attendance register (TRADOC Form 270-R), IAW paragraph 3-12, above. IDT only.

d. The current training schedule.

e. The course POI/CMP and current lesson plan.

f. Instructor credentials, to include—
(1) Copy of the instructor's proponent certification, or a copy of the memorandum to the proponent requesting certification.
(2) Appropriate operator's permit.

g. Critique sheets for class visitors.

h. Daily risk assessment worksheet.

TR 350-10, para 2-7h.

2-7. Conduct of training. Commandants will ensure training is conducted and evaluated per the principles listed in Field Manual (FM) 25-100 in conjunction with FM 25-101 (Note: both manuals to be revised as new "3" series FM publications). Noncommissioned Officer Academy commandants will use the training schedule format outlined in FM 25-101.

a. Prior to enrollment, students must be fully capable of performing supporting individual tasks and the tasks required in the next lower level course. Commandants may evaluate student capabilities through appropriate testing, and if necessary, provide remedial training, recycle to a later class, or return to unit of assignment those students who do not meet course prerequisites or do not have the required minimum skills. Remedial training will be scheduled when applicable on the training schedule, but will not be conducted during normal POI time.

b. Schools will train tasks only at the skill level prescribed for each course.

c. Student training, SGL, SSGL and instructors.

(1) School staffs, faculties, SSGL, and training departments will supervise and support SGL, instructors, and students, and ensure commitment to training, educating, and developing each student.

(2) Trained, qualified, certified, and experienced SGL, SSGL, and instructors will conduct and supervise student training (SSGLs may be used as SGLs as the NCOA commandant deems necessary to accomplish the training mission or as temporary fill-ins when shortages of by-grade SGLs dictate the need to do so). Small group leader-to-student ratios will be sufficient to ensure student control and supervision and facilitate teaching, coaching, mentoring, and developing individual student leadership skills to the level for which training is provided. (See paragraph 2-13.)

(3) Small group leaders, SSGLs, and instructors will provide students with progressive and sequential training, accurate evaluations, and timely feedback via task performance after action reviews.

(4) When applicable, SGLs, SSGLs, and instructors will use mission orders to convey training objectives. Mission orders will clearly articulate the commander's intent. Small group leaders, SSGLs, and instructors will ensure students use mission orders to demonstrate a thorough understanding of the mission and the commander's intent.

d. Training environments must enhance learning, encourage student initiative, require students to attain and sustain high levels of discipline, have defined, publicized, and enforced standards, and focus on preparing the student to lead soldiers through training, maintenance, deployment, and sustained tactical operations in support of unit missions.

e. When possible, students will be given opportunities to gain experience by leading and/or training soldiers in other courses (for example, conduct marksmanship and physical fitness or CTT training for advanced individual training students).

f. Commandants will use proponent-developed end-of-course (Phase II) CPX, FTX, STX, or LTX, virtual or live, in the field or at a job site, as a culminating event designed to evaluate (Go/No-Go) the soldier's ability to perform the terminal learning objectives of the course to graduate. These events will be at least 72 hours in length, be scenario driven and conducted under CONOPS conditions. Leader development course proponents will publish minimum guidelines and evaluation criteria for exercise execution in the course management plan of each course they develop.

g. Student evaluations. Small group leaders and instructors will—

(1) Determine if the student has demonstrated a sufficient level of competency to pass the course IAW the student evaluation plan as prescribed in TRADOC Reg 350-70.

(2) Conduct developmental counseling to provide students information on their strengths and weaknesses, and courses of action to improve performance.

(3) Consolidate and analyze student performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commandant/Course Management Plan (CMP). Small group leaders, SSGLs, and instructors will provide students documented feedback and will use analysis results to determine ratings for completing DA Form 1059 (Service School Academic Evaluation Report (AER)) and course academic records and reports. Records and reports must adequately support appropriate administrative action for students who fail to meet course requirements.

(4) Complete an AER (DA Form 1059) for all students per AR 623-1. Whenever possible, students should receive a copy of their completed AER at graduation. However, although Army policy allows for completion within 60 days after graduation, at a minimum, students will be provided an opportunity to review their draft AER prior to departure. Written comments in block 16 will be tailored for each individual.

h. Training material. Sufficient quantities of the most current training products will be maintained for each class.

(1) Training support package and examination material.

(2) Lesson reference files and course changes.

(3) All training aids and devices referenced in the current lesson plans.

(4) Student issue materials including advance sheets, supplemental readings, compact discs, student handouts, reference books, practical exercises, and solution sheets.

(5) At least one visitor folder will be available in each classroom. See TRADOC Reg 350-18 for visitor's folder contents.

TR 350-6, para 3-2, Development of training programs. *The proponent school is responsible for POIs. New and revised POIs will be prepared and approved IAW TRADOC Reg 350-70. Commanders will ensure all training periods are initially risk assessed and the risk assessment is updated as factors change.*

TR 350-6, para 3-6, Lesson plans and instructor preparation.
a. The tasks and subjects in a POI form the basis for each period of instruction. *Lesson plans will be prepared by the proponent and kept up-to-date for each period of instruction.*

b. Each ATC and school will establish a system for monitoring and improving the quality of instruction. Essential to this is a standardization/certification process to ensure that each instructor is fully qualified and current in all aspects of their subject. This certification will be IAW TRADOC Reg 350-70. All IET instructors will accomplish semiannual physical fitness testing.

c. All IET cadre will accomplish semiannual physical fitness testing. All cadre responsible for conducting instruction and/or evaluating training will be certified on all hands-on phase tasks annually. Cadre in BCT/OSUT units will be certified on those phase tasks listed in the BCT POI and will also accomplish annual weapons qualification. Cadre in AIT units will provide reinforcement training on, and reevaluation of, those BCT common skills tasks selected by the commander. Records of all certification or qualification will be maintained at the battalion level.

Applicable POI/Course Management Plan.

Tab 17

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Standard 17 Reference Excerpts

AR 5-13, para 5-6/7.

5.6 Ammunition forecasting
a. Units will use a 12 month moving forecast to maintain an up-to-date projection of monthly ammunition needs that align with planned training events. Commanders will use forecasts to consolidate needs and to ensure forecasted quantities DA Form 5514-R (TAMIS Training Ammunition Forecast Report) do not exceed TAMIS authorizations. This forecast will be used as input to the WARS report and submitted to IOC with an information copy sent to the supporting installation.

b. The forecast will result in an ammunition allocation based on available assets. Ammunition allocations will not exceed authorizations; however, because installation forecasts include tenant units, other services, etc., IOC/MICOM will verify authorizations with MACOM ammunition managers before canceling a requisition appearing to exceed authorizations.

c. Appendix B covers the 12-month moving forecast. Units will prepare monthly forecasts and include forecasts for the next 12 months. Submit changes 120 days before the training event.

5.7 Requests for ammunition
Units requesting ammunition will use DA Form 581 (Request for Issue and Turn-In of Ammunition). (See DA PAM 710-2-1 for preparation instructions.) Requests for specific quantities of ammunition will be based on equipment or system availability, range time, unit strength, and training objectives. Commanders at all levels will ensure ammunition requested is within authorizations and corresponds with the ammunition forecast.

TR 350-8, paras 2-1,2,3&4, Ammunition Requirement.
2-1. General. Because of the relationship between the TAMS and the Army Planning, Programming, and Budgeting System, ammunition requirements must project in excess of 5 years in advance. TRADOC consolidates these requirements for presentation to the annual Training Ammunition Authorization Committee (TAAC), a standing DA committee. The committee uses this input for procurement and future authorization decisions.

2-2. Requirements determination. Individual and crew-served weapon qualification firing tables, school program of instruction (POI), and other training exercises determine training ammunition requirements. TRADOC activities report long-range training ammunition requirements under RCS ATTG-38; these requirements cover a 6-year period beginning 2 years from the current fiscal year. This long lead time is necessary due to funding procedures and the need to establish industrial sources for new munitions. Ammunition managers must attempt to foresee all future training ammunition needs and include all projected permanent party training, anticipated student loads, existing and new POI, foreign ammunition, and new weapon systems. This is a critical phase in the development of ammunition requirements. Ammunition procurement

planning depends upon accurate identification of these future needs. If you do not identify requirements sufficiently in advance, the ammunition will not be available when needed. Installation training ammunition managers are in the best position to project these requirements, and they must include ammunition requirements as part of all long-range planning. In this connection, they must maintain accurate files to enable subsequent training ammunition managers to refine requirements.

2-3. Training Requirements and Analysis System (TRAS) (RCS ATTG-29(R1)). TRADOC Reg 351-1 provides excellent planning data for determining training ammunition requirements for all institutional training in TRADOC. Under TRAS, there are two important resource supporting documents: the individual training plan (ITP) and the POI.

a. The ITP. The ITP describes long-range plans for individual training programs. Submitted 36 months prior to course implementation, it identifies, by resident course, the estimated ammunition resources required in a Training Ammunition Summary format **(see app E).** This information will provide training ammunition managers with long-range training ammunition requirements.

b. The POI. The POI should be available 6 months prior to course implementation. *Although too late for determining long-range requirements, the POI provides a list of all ammunition resources necessary to support the resident training program.* This information is pivotal to determining accurate current year requirements. Compute resident training ammunition authorizations only upon the data provided by an approved POI.

c. Student input. Training ammunition managers must coordinate closely with course developers and schedulers to identify valid student input figures, modify the scheduled student fill by historical “no show” rates, and develop attrition factors to determine actual training ammunition needs.

2-4. Forecasting ammunition. Forecast short term requirements to the supporting ammunition supply activity correctly to ensure supplies will be available when needed. AR 700-22 is the directive requiring ammunition forecasting, and DA Pam 710-2-1 provides a standard format.

a. Ammunition forecasts are feeder reports for the Worldwide Ammunition Reporting System (WARS) (RCS CSGLR-1322(R1), and the forecasts establish minimum 90-day stockage levels at ammunition supply points (ASPS).

b. Installation training ammunition managers must establish procedures that submit training ammunition forecasts for all customers in time to meet the 90-day stockage objective. Consolidate user forecasts into the WARS report by month for the next 12 months for planning purposes. Always show 12 months of forecasts, even when it requires forecasting into the next fiscal year. This assumes that the next fiscal year’s authorization will be similar to the current year’s.

c. Units may only forecast authorized training ammunition (exception see b above).

d. Do not forecast substitute/secondary Department of Defense identification code (DODIC): Forecast only primary ammunition DODIC.

e. CALS-controlled items (app F) require a minimum 120-day forecast. Without this minimum lead time, we cannot guarantee support. Due to production scheduling and criticality of some CALS-controlled items, we recommend a longer forecast period.

f. Forecast training ammunition at the site of the proposed training (e.g., units going to another installation will forecast to that installation at least 90 days in advance--120 days for CALS items).

g. The installation training ammunition manager will not approve requests in excess of unit forecasts if this would cause a shortfall for another unit that forecasted properly. You may support issues to meet emergency, unforecasted requirements on a case-by-case basis after reviewing the asset posture and all other forecasted requirements.

h. Users drawing training ammunition from other than their home installation will comply with the supporting installation's forecasting and logistics policies. The supporting installation must verify that the user forecasts only authorized ammunition (exception see b above).

i. When forwarding monthly WARS to HQ TRADOC, the installation training ammunition manager will verify that forecasted quantities support all training plans, unit authorizations, and scheduled institutional training.

j. Ammunition forecasts do not carry over to the next month if the requester does not draw the ammunition. The requester must resubmit the forecast through the installation training ammunition manager.

TR 350-6, para 3-6, Lesson plans and instructor preparation.
a. The tasks and subjects in a POI form the basis for each period of instruction. Lesson plans will be prepared by the proponent and kept up-to-date for each period of instruction.

TR 350-6, para 3-12, TRADOC Pam 600-4 (IET Soldier's Handbook).
a. TRADOC Pam 600-4 will be issued to all soldiers entering BCT and OSUT. The pamphlet provides soldiers with a pocket reference for subjects taught and tested in BCT, with emphasis on the tasks in the Soldier's Manual of Common Tasks (STP-21-1-SMCT).

b. Commanders will ensure that IET soldiers departing for AIT have a serviceable copy of the TRADOC Pam 600-4 in their possession.

TR 350-18, paras 2-11e&l, United States Army Reserve Command (USARC) will—
e. Assist DIV(IT) with procurement of equipment based on training requirements.

i. Provide USAR TASS training battalions with personnel, facilities and equipment to support approved ARPRINT. Initiate Installation Support Agreement (ISA) with other component units and installations to borrow facilities and equipment not available in the USAR.

TR 350-18, para 2-12b, State Adjutants General (TAGs) will—
b. Ensure equipment availability based on training requirements.

TR 350-18, paras 2-15a&e.
a. Facilitate TASS training support requests.

e. Perform ammunition management for their respective regions and coordinate with HQ, TRADOC, ATTN: ATOM-TS, for training ammunition requirements.

TR 350-18, paras 2-19e&k, TASS training battalions will—
e. Order instructional support materials.

k. Forecast and request required ammunition and equipment for training.

TR 350-18, paras 2-20b&c, Regional Support Commands (RSC) will—
a. Publish student orders in a timely manner.

b. Ensure equipment availability based on training requirements, IAW POI and course management plan (CMP).

c. Ensure training facilities are available based on training requirements, IAW POI and CMP.

TR 350-18, para 3-9, Instructional products and training aids requisitioning.
a. Instructional products will be furnished by ATSC or Reimer Digital Library (RDL). The AC, ARNG and USAR will document resource requirements and the organizations providing resources in the ATRRS. Resource data will be shown by school and course by the unit identification code (UIC). The resource requirements will be for the execution

year. Any changes to fiscal year (FY) school missions that occur as a result of TRAP actions must be reflected in the appropriate ATRRS resource display screens.

b. TASS training battalions are supported with instructional products from three distinct sources:

(1) The Visual Information/Training Support Center (VI/TSC) System. Training aids, devices, and visual information products and equipment, although often required in the conduct of courses, are not included in instructor or student sets, and are not provided by ATSC or RDL. These items must be requested, on a loan basis, from the appropriate VI/TSC. All TASS training battalions will establish and maintain accounts with the VI/TSC serving their geographic location. Courseware products will be closely examined for required training aids, devices, simulations and equipment, and requests for such items will be made in sufficient time to support scheduled classes. Note that VI/TSC loans are made on a first-come, first-served basis. Adequate prior planning and coordination are essential to ensure responsive support. TASS training battalions should maintain copies of the following publications in their training support libraries:

- DA Pam 350-9
- DA Pam 350-100
- TRADOC Pam 350-9

(2) The Department of the Army administrative publications system. Some courses still require DA publications as instructor resources and/or as student texts. Such DA publications are not included in course instructor/student sets and must be requisitioned separately. All TASS training battalions will establish accounts with the U.S. Army Publications Distribution Center, St. Louis. Procedures for establishing and using DA publications accounts are found in AR 25-30 and DA Pam 25-33. Courseware products will be closely examined for required training aids, devices, simulations and equipment, and requests for such items will be made in sufficient time to support scheduled classes.

(3) Courseware reproduction/distribution system.

(a) Reproduction and distribution of TATS courseware/RC3 are requirements-based, driven by the ARPRINT and TRAP requirements. Courseware is reproduced and distributed by ATSC based on user requests received during established requisitioning windows for IDT and AT as follows:

- 1 February - AT requisitions due to ATSC for PLDC, BNCOC/ANCOC Common Leader, Phase I, BNCOC/ANCOC Phase II, First Sergeants Course (FSC), and NBC Defense.
- 1 November - AT requisitions due to Directorate of Non-Resident Studies (DNRS)/CGSC for CGSOC and CCC. CGSC will forward to ATSC.
- 1 June - IDT requisitions due to ATSC for BNCOC/ANCOC Common Leader Phase, Phase I, and NBC Defense.
- 1 April - IDT requisitions due to DNRS/CGSC for CGSOC and CCC. CGSC will forward to ATSC.
- For TAITC, SGITC, and SATBC requests through: Commander USATSC, ATTN: DLC-S, Fort Eustis, VA 23604-5166.

(b) All courseware user requirements are submitted using TRADOC Form 350-18-R-E. All requisitions are forwarded through appropriate channels to ATSC

(TMSD-T). Sample TRADOC Form 350-18-R-E is at figure 3-1. Completion instructions are at appendix E.

(c) All courseware requisitions must be received by ATSC prior to the close of the appropriate requisition window. At the close of each window, ATSC consolidates the requirements, by course, into Basis-of-Issue Plans (BOIP). The BOIP determine how many courseware sets will be distributed.

(d) Submit requisitions to Commander, U.S. Army Training Support Center, ATTN: ATIC-TMSD-T, Bldg 1542, Fort Eustis, VA 23604-5168. DSN 927-5066/5072, Comm (757) 878-5066/5072.

(e) Training/TD (task) proponents may choose to reproduce, distribute, and manage TATS courses. The courseware can be multimedia and may involve distribution over video teletraining (VTT) or the Internet. Proponents will distribute courseware in response to the BOIP, promulgated by ATSC. ATSC and responsible training/TD (task) proponents distribute courseware so the products will be on hand prior to the training start date.

(f) Courseware requisitions received by ATSC outside the specified windows are called “out-of-cycle” requests. ATSC and training/TD (task) proponents maintain residual stockage of courseware against such contingencies, but when these supplies are exhausted, an additional printing of courseware materials may not be available.

c. Requisitions for course materials should be initiated for a particular phase or module, per the TATS course structure and the CMP implementation guidance, i.e., for a normal two-phased course, ADT phase/module should not be ordered at the same time as the IDT phase. Each phase should be ordered separately using TRADOC Form 350-18-R-E. See sample in figure 3-1.

d. TAG/DIV(IT) will ensure:

(1) All instructional products needed to conduct required classes are identified and requisitioned in sufficient time to ensure receipt prior to class start dates.

(2) Accountability for all products received is established and maintained.

(3) Cross-leveling of all available products is accomplished to the maximum practicable extent before requisitions for products are forwarded.

(4) All instructional products are identified, retained, conserved, cross-leveled, and shared.

e. Specific courseware responsibilities:

(1) TIE will monitor with ATSC and TASS regiments/brigades to resolve problems/issues concerning courseware requisitioning and delivery.

(2) Regional TASS regiments/brigades will—

(a) Review and approve/disapprove all justifications for issue of additional instructor sets, recoverable items in excess of authorized quantities, and all out-of-cycle requisitions and forward to ATSC or DNRS, as appropriate, and furnish a copy to the TIE.

(b) Direct inventory/accountability procedures which enable visibility and redistribution of all available courseware.

(3) TASS training battalions will—

(a) Maintain a training support master file of current courseware they are chartered to teach under TASS alignment.

(b) Provide courseware inventories as directed by TASS regiments/brigades.

(c) Establish test control procedure for Test Control Officer (TCO)/NCO that supports ARs 380-5 and 611-6.

- Provide training/TD (task) proponents, ATSC, with orders or memorandums appointing the TCO/NCO and a DA Form 1687 authorizing the TCO to request test material.
- Test material must be requisitioned on a separate TRADOC Form 350-18-R-E.
- Test will only be issued for courses requested and only one copy of each test version will be issued.
- Failure to maintain an account with training/TD (task) proponent or ATSC for test material will result in nonsupport of testing products.
- For TATS course testing material, establish test control account with proponent school.

f. Account establishment/maintenance.

(1) All TASS school codes must establish and maintain signature card accounts (DA Form 1687) with ATSC (ATTN: ATIC-TMSD-T).

(2) DA Form 1687 will be updated and resubmitted by 1 October of each year. A new form will be immediately submitted when personnel, address, or other changes occur which affect the DA Form 1687. ATSC must be notified immediately of changes to POC, telephone numbers, and addresses in order to ensure timely and efficient shipment of courseware.

g. Requisitioning procedures.

(1) TRADOC Form 350-18-R-E will be used to request courseware for both IDT and AT phases. A copy is provided at the back of this regulation for local reproduction.

(2) TASS regional regiment/brigade must forward out-of-cycle requisitions to ATSC, when required, 60 days prior to scheduled class start date.

(3) Requisitions for course materials should be initiated for only one phase/module at a time (i.e., for a normal two-phased course, the ADT phase should not be ordered at the same time as the IDT phase). Requirements for the second phase/module may be significantly different from initial enrollment in the first phase. For those few courses that are not packaged by phase/module, the entire course must be ordered at one time. In those cases, it is extremely important that course materials be conserved and brought to the ADT portion of the course, as a second requisition for the same class will not be honored.

(4) Instructor sets, in their entirety, are accountable/recoverable items, as are selected student materials so identified. If a course has been taught by TASS school code in the preceding 3 years, requisitions for additional instructor sets/materials and recoverable student materials must be justified on the basis of increased student load and/or additional instructors. Justification for additional or replacement recoverable materials must be forwarded with the TRADOC Form 350-18-R-E.

(5) In the event of canceled or rescheduled courses, increases or decreases in enrollment, or training site changes, ATSC should be notified by the most expeditious means available so that shipments in progress can be adjusted accordingly. Telephonic changes should be followed up with hard copy.

(a) When a change in training (delivery) location occurs and the change is not reported in sufficient time to redirect courseware shipment(s), TASS battalion commander is responsible for receiving the shipment(s) and transporting to the proper training location.

(b) If a course/requirement is canceled, but the notification is not made in sufficient time to stop shipment of courseware, TASS battalion commander will report any excess to TASS regiment/brigade.

(c) If materials requirements increase after the initial request has been processed, TASS school code must inform ATSC at least 30 days prior to the training date.

h. Inventory and cross-leveling procedures.

(1) School codes will inventory all courseware quarterly and copy furnish TASS regional regiments/brigades and TIE.

(2) All course materials not required by TASS school code for the conduct of current year training will be identified to regional TASS regiments/brigades for cross-leveling to meet other current year requirements.

(3) Regional TASS regiments/brigades will supervise the cross-leveling of courseware within their regions and will report to ATSC any excess materials for cross-leveling among other regions.

TR 350-18, paras 3-19&20.

3-19. Resources.

a. TASS school codes are responsible for obtaining all resources associated with conducting the course IAW TASS cross component resourcing MOU. ISA/MOU will be established to facilitate borrowing equipment or facilities.

b. When equipment to support training is insufficient for all students or teams to perform to standard, the following considerations apply:

(1) If equipment nonavailability degrades training to the point that award of the MOS cannot be justified, training will not be conducted.

(2) An exception to policy/waiver must be approved by the training/TD (task) proponent before the start of scheduled training.

c. Whenever a TASS training battalion instructor performs IDT at a class location other than the normal duty station (NDS), and outside normal commuting distance (as defined in Joint Federal Travel Regulations), the instructor is authorized travel/per diem from either the NDS or residence, depending on departure point when directed to perform duty at a site other than the NDS. The NDS for TASS training battalion instructors is defined as the primary duty location where the instructor spends the majority of his/her time teaching. If the instructor does not spend the majority of his/her time at any one

location within a fiscal year, then the TASS training battalion commander must designate the NDS either as the TASS training battalion headquarters or a teaching site. This is true whether the TASS training battalion commander has designated the school headquarters or a teaching site as a NDS. If the NDS is the teaching site, then the instructor would be entitled to travel/per diem to the school headquarters. However, if the TASS training battalion commander has designated the NDS to be the school headquarters, the instructor is not entitled to reimbursement for travel to the TASS training battalion headquarters.

3-20. Funding.

a. School training missions are developed during the SMDR IAW AR 350-10. The chiefs of each component are represented at the SMDR. Schools see their future training missions prior to the SMDR and have an opportunity to comment on their resource constraints. No school is given a mission unless its component agrees to provide the resources to execute the mission. Schools will not nonconduct classes because of resource constraints in the execution year, unless all components with quotas agree to the cancellation, or it is determined by HQDA that the necessary resources cannot be made available. Schools receive no reimbursement for students, regardless of the service or component of the student. Each Army component is responsible for providing sufficient total resources to train the number of students programmed to attend its schools as identified by ARPRINT. Resources, for the purpose of this regulation, are defined as:

(1) Manpower (staff and faculty).
(2) Facilities (instructional, billeting, and messing).
(3) Equipment, to include operating tempo (OPTEMPO).
(4) Supplies: classes I, II, III, III(P), IV, VIII, and IX.

b. Class II, personal clothing (uniform) requirements, will be determined by the school and shown in the ATRRS. The school will not issue personal clothing. The students' unit of assignment will ensure they report for training with the required individual clothing and equipment.

c. Class V. HQ TRADOC is the one-source contact to HQDA (DAMO-TRO) for all POI-driven class V requirements in support of the TASS. Class V requirements will be—

(1) Managed by TIE. The TIE in each region will act as a TRADOC installation to consolidate and report Class V requirements and obtain annual authorizations for the TASS training battalions in its area.

(2) Based upon the approved course and guidance in TRADOC Reg 350-8 and AR 5-13.

d. Personnel.

(1) Each component must provide personnel support to the other components, within the limits of their resources and ISA, to accomplish the TASS training mission.

(2) TRADOC will host a meeting in coordination with NGB and USARC, not later than 120 days prior to the beginning of the training year, to determine manpower

shortfalls and negotiate necessary personnel support agreements among the components.

(3) Reimbursement among the military pay appropriations (National Guard Pay Appropriations (NGPA) and Reserve Pay Appropriations (RPA)), for services provided by one component in support of another component, may occur under certain circumstances. However, sufficient Funded Reimbursement Authority (FRA) must first be obtained through the normal budgetary process. In order to ensure this authority is available, local support agreements must be negotiated and reported up the chain-of-command for aggregation and incorporation into budget submissions. NGB and HQ USARC will issue instructions to subordinate activities on procedures to report locally negotiated support agreements. NGB, OCAR and HQ USARC will review and reconcile the amounts that drive the requirement for FRA and will incorporate into budget submissions. NGB and USARC must approve all MOA to ensure there are sufficient funds available in the FRA in the year of execution. Once approved, the funds are locked-in for that support. NGB and USARC then provides an open allotment fund site for the orders. In addition, NGB, OCAR and HQ USARC will negotiate summary level agreement concerning overall reimbursement between NGPA and RPA. In the year of execution, a Military Interdepartmental Purchase Requests (MIPR) will be exchanged between NGB and HQ USARC to effect the reimbursement. Lower echelons will not be required to process reimbursements, but will receive adjustments to their direct funding based on support agreements. Any questions concerning reimbursement among the military pay appropriations should be presented in resource management channels.

(4) Operations and Maintenance, Army, Operations and Maintenance, Army Reserve, and Operations and Maintenance, National Guard funds may be used to pay the travel and per diem costs of borrowed instructors or other personnel, regardless of component.

e. Equipment support.

(1) Short-term loan of equipment is governed by AR 700-131.

(2) Long-term loan of equipment is governed by DoD Directive 1225.6.

(3) The borrower will pay all costs associated with the use of borrowed equipment. Costs include preparation for issue and turn-in; transportation to and from the lender; OPTEMPO; and repairs (to include parts and manpower). Borrowed equipment will be returned to the lender in the same condition as when borrowed. The borrower will transfer funds to the lender to make repairs, if the borrower does not have repair capability.

(4) Borrowed equipment will pass a technical inspection (TI) at the organizational level, prior to shipment, both to and from the borrower. The condition of borrowed and returned equipment must normally meet -10/20 standards. However, TASS organizations may agree to terms and conditions different from -10/20 standards, when it is beneficial for a school to use equipment for training purposes that does not meet the standards. A joint TI will be conducted with representatives from both the borrowing and lending units present. If a joint TI is not possible, the borrower and lender will sign a memorandum of acceptance before the equipment is shipped.

f. Facilities.

(1) The component with the school mission is responsible for providing the facilities necessary to conduct training, without reimbursement.

(2) When a school wishes to conduct a course at facilities owned by another component, it will reimburse, via DD Form 448 (MIPR), the supporting installation or facility.

(3) The components are not responsible for providing facilities and services, without reimbursement, for “walk-on” students in excess of the maximum class size shown in ATRRS. “Walk-on” students in excess of the maximum class size may be transferred to another class or returned to their units of assignment, if another class is not available. The components may agree to provide the resources necessary to accommodate “walk-on” students.

g. Billeting. Installation commanders will make every effort to billet students on post. Installation commanders will not require students not in a temporary duty (TDY) status to maintain a course related bachelor officer quarters/bachelor enlisted quarters for which the student must pay.

(1) Courses currently conducted with billeting provided at no cost to the students, will continue as such.

(2) Billeting will be provided to students from all components on an equal basis, regardless of training status (e.g. AT, ADT, TDY or TDY and return).

(3) If government quarters are not provided, the school will provide students a non-availability statement so indicating, and the student will be reimbursed for his costs through normal per diem claim procedures.

(4) If a school uses contract facilities, such as dormitories on a civilian education campus, and incurs a cost for such use, the school may charge students a billeting fee. Students from all components will be charged equally. Students will be reimbursed through normal per diem claim procedures. If a school chooses not to charge students, the school is responsible for payment of the billeting costs.

h. Messing.

(1) Schools will provide government meals to students where possible. The operating costs of providing meals will be borne by the school.

(2) Personnel entitled to meals at government expense shall be furnished such meals at no cost to the individual, regardless of the individual’s component. In no case will a student from one component be required to pay a different amount than students from another component in the same or like training status.

(3) The component providing meals at government expense to personnel of the other components may obtain reimbursement. Reimbursement is accomplished at DA level.

(4) The school will provide students who are charged for meals a non-availability statement indicating such, and the student will be reimbursed through normal per diem claim procedures. In no case will students from one Army component be issued non-availability statements for the same training course in which government messing is available to students from another component.

TR 350-70,
VI-6-9. Resources Identification

Description a. All resources required to conduct the training are identified when designing that training. This normally occurs when creating the learning step/activity. There may be additional resource requirements to support an entire course. Total training resource requirements are compiled and included in appropriate training plans, POI, and TSP.

Outputs b. The output of this design step is a listing of all resource requirements, including ---

(1) Instructors.
(2) Support personnel.
(3) Classrooms.
(4) Training areas.
(5) Ammunition.
(6) OPTEMPO.
(7) Printing and reproduction.
(8) Range, and other facilities (Military Construction Army (MCA) projects, etc).
(9) Equipment (weapons, audiovisual, radios, etc.).
(10) Equipment support (maintenance, transport, etc.).
(11) Setup (e.g., miles, flight hours) *(optional)*.

Process Flow c. See “Learning Step/Activities Descriptive Details” (this chapter).

Quality Control d. For quality training, design personnel must ensure all ---

(1) Resources required to perform each learning step/activity are identified.
(2) Resource shortfalls and impact on mission accomplishment are identified and brought to command attention.

Tab 18

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Standard 18 Reference Excerpts

TR 350-70, VI-6-9, Resources Identification.

Description a. All resources required to conduct the training are identified when designing that training. This normally occurs when creating the learning step/activity. There may be additional resource requirements to support an entire course. Total training resource requirements are compiled and included in appropriate training plans, POI, and TSP.

Outputs b. The output of this design step is a listing of all resource requirements, including ---

(1) Instructors.
(2) Support personnel.
(3) Classrooms.
(4) Training areas.
(5) Ammunition.
(6) OPTEMPO.
(7) Printing and reproduction.
(8) Range, and other facilities (Military Construction Army (MCA) projects, etc).
(9) Equipment (weapons, audiovisual, radios, etc.).
(10) Equipment support (maintenance, transport, etc.).
(11) Setup (e.g., miles, flight hours) *(optional)*.

Process Flow c. See "Learning Step/Activities Descriptive Details" (this chapter).

Quality Control d. For quality training, design personnel must ensure all ---

(1) Resources required to perform each learning step/activity are identified.
(2) Resource shortfalls and impact on mission accomplishment are identified and brought to command attention.

TR 350-70, VI-8-9, Course Management Plan (CMP).

Description a. The course management plan is a document that provides the course managers
and the instructors the information required to manage and conduct the course. It is required for exported training courses, phases, or modules.

Outputs b. The primary CMP development output is the complete Course Management Plan and components.

Standard Format c. Follow the Course Management Plan format provided in Appendix E.

Start Point d. Course Management Plan development starts upon approval of the course design.

CMP Components e. The CMP will contain information necessary for managing and conducting the course. Format and component guidance is in Appendix E, Lesson Plan, TSPs, and CMP Formats and Components.

CMP Completion f. The Course Management Plan is considered complete when the TATS TSP is considered complete. See “TSP Completion” in Paragraph VI-8-6.

Quality Control g. For a CMP, each involved individual must ensure it ---
(1) CMPs and all components thereof are available at the using school/organization.
(2) CMP is complete, accurate, and current.
(3) Using school/organization implements course/course components IAW CMP.
(4) Common core input is included.

Tab 19

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Standard 19 Reference Excerpts

TR 350-6, para 2-2c.

c. The following formal counseling requirements will be met for all IET soldiers:

(1) Company commanders will ensure subordinate leaders counsel soldiers within 72 hours of arrival at the training unit.

(2) Soldiers are counseled at the conclusion of each phase of training.

(3) Counseling includes an objective evaluation of the soldier's progress, adherence to Army Values, capability to operate as a team member, and establishment of attainable goals for the next phase of training.

(4) Soldiers are counseled on the provisions for additional training should they not be able to meet established standards and requirements (e.g., new start, rehabilitative transfer, remedial training).

(5) All performance counseling will be documented on DA Form 4856 (Developmental Counseling Form) or on a locally produced form.

TR 350-18, para 3-29, Student evaluations.

a. Instructors/facilitators will measure student performance IAW TRADOC Reg 350-70, chap VI-7, and TD (task) proponent-provided student evaluation plans and tests.

(1) Instructors will conduct developmental counseling IAW FM 22-100.

(2) Designated instructors will consolidate and analyze each student's performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commander. Evaluators will provide students documented feedback at completion of each evaluation or test. Course manager/senior instructors or other school personnel knowledgeable of course requirements will counsel students on consequences for failure on evaluations, IAW course management and student evaluation plans. Evaluators will use results to determine ratings for AER and course academic records and reports.

TR 350-18, para 3-28, Student academic records.

a. The TASS battalion commander is responsible for ensuring all student input/output data is posted to ATRRS within 10 working days of course start date and completion date.

b. The TASS battalion will maintain individual records for each student for 12 months, containing the following documents:

(1) The enrollment application (AATAS or DA Form 4187 for IDT).

(2) The attachment order, if prepared.

(3) A copy of the pre-execution checklist with appropriate signatures.

(4) All student leadership evaluations.

(5) All test scores.

(6) All counselings, to include initial, performance, leadership, end of course evaluations, and individual developmental action plans.

(7) Copy of course completion, DA Form 1059.

(8) Any other correspondence referencing the soldier, i.e., drop packet.

(9) DA Form 705 (maintained for professional development courses, and selected functional courses).

(10) DA Form 3349 with MMRB results (if applicable).

c. After the 12-month record retention period, the DA Form 1059 will be removed from the individual records and kept on file, IAW AR 25-400-2. Supporting documentation is destroyed.

d. The TASS battalion may prepare a certificate of training for each student (except AMEDDC&S/OCS courses) upon successful completion of all phase requirements. The certificate of training will include the student's name, course title and phase, and completion date.

e. Records for disenrolled students must be maintained for two years IAW AR 25-400-2/TRADOC Reg 351-10.

TR 350-10, para2-7g(3).

2-7. Conduct of training. Commandants will ensure training is conducted and evaluated per the principles listed in Field Manual (FM) 25-100 in conjunction with FM 25-101 (Note: both manuals to be revised as new "3" series FM publications). Noncommissioned Officer Academy commandants will use the training schedule format outlined in FM 25-101.

a. Prior to enrollment, students must be fully capable of performing supporting individual tasks and the tasks required in the next lower level course. Commandants may evaluate student capabilities through appropriate testing, and if necessary, provide remedial training, recycle to a later class, or return to unit of assignment those students who do not meet course prerequisites or do not have the required minimum skills. Remedial training will be scheduled when applicable on the training schedule, but will not be conducted during normal POI time.

b. Schools will train tasks only at the skill level prescribed for each course.

c. Student training, SGL, SSGL and instructors.

(1) School staffs, faculties, SSGL, and training departments will supervise and support SGL, instructors, and students, and ensure commitment to training, educating, and developing each student.

(2) Trained, qualified, certified, and experienced SGL, SSGL, and instructors will conduct and supervise student training (SSGLs may be used as SGLs as the NCOA commandant deems necessary to accomplish the training mission or as temporary fill-ins when shortages of by-grade SGLs dictate the need to do so). Small group leader-to-student ratios will be sufficient to ensure student control and supervision and facilitate

teaching, coaching, mentoring, and developing individual student leadership skills to the level for which training is provided. (See paragraph 2-13.)

(3) Small group leaders, SSGLs, and instructors will provide students with progressive and sequential training, accurate evaluations, and timely feedback via task performance after action reviews.

(4) When applicable, SGLs, SSGLs, and instructors will use mission orders to convey training objectives. Mission orders will clearly articulate the commander's intent. Small group leaders, SSGLs, and instructors will ensure students use mission orders to demonstrate a thorough understanding of the mission and the commander's intent.

d. Training environments must enhance learning, encourage student initiative, require students to attain and sustain high levels of discipline, have defined, publicized, and enforced standards, and focus on preparing the student to lead soldiers through training, maintenance, deployment, and sustained tactical operations in support of unit missions.

e. When possible, students will be given opportunities to gain experience by leading and/or training soldiers in other courses (for example, conduct marksmanship and physical fitness or CTT training for advanced individual training students).

f. Commandants will use proponent-developed end-of-course (Phase II) CPX, FTX, STX, or LTX, virtual or live, in the field or at a job site, as a culminating event designed to evaluate (Go/No-Go) the soldier's ability to perform the terminal learning objectives of the course to graduate. These events will be at least 72 hours in length, be scenario driven and conducted under CONOPS conditions. Leader development course proponents will publish minimum guidelines and evaluation criteria for exercise execution in the course management plan of each course they develop.

g. Student evaluations. Small group leaders and instructors will—

(1) Determine if the student has demonstrated a sufficient level of competency to pass the course IAW the student evaluation plan as prescribed in TRADOC Reg 350-70.

(2) Conduct developmental counseling to provide students information on their strengths and weaknesses, and courses of action to improve performance.

(3) Consolidate and analyze student performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commandant/Course Management Plan (CMP). Small group leaders, SSGLs, and instructors will provide students documented feedback and will use analysis results to determine ratings for completing DA Form 1059 (Service School Academic Evaluation Report (AER)) and course academic records and reports. Records and reports must

adequately support appropriate administrative action for students who fail to meet course requirements.

(4) Complete an AER (DA Form 1059) for all students per AR 623-1. Whenever possible, students should receive a copy of their completed AER at graduation. However, although Army policy allows for completion within 60 days after graduation, at a minimum, students will be provided an opportunity to review their draft AER prior to departure. Written comments in block 16 will be tailored for each individual.

h. Training material. Sufficient quantities of the most current training products will be maintained for each class.

(1) Training support package and examination material.

(2) Lesson reference files and course changes.

(3) All training aids and devices referenced in the current lesson plans.

(4) Student issue materials including advance sheets, supplemental readings, compact discs, student handouts, reference books, practical exercises, and solution sheets.

(5) At least one visitor folder will be available in each classroom. See TRADOC Reg 350-18 for visitor's folder contents.

FM 22-100, Apx C.

Appendix C

Developmental Counseling

C-1. Subordinate leadership development is one of the most important responsibilities of every Army leader. Developing the leaders who will come after you should be one of your highest priorities. Your legacy and the Army's future rests on the shoulders of those you prepare for greater responsibility.

C-2. Leadership development reviews are a means to focus the growing of tomorrow's leaders. Think of them as AARs with a focus of making leaders more effective every day. These important reviews are not necessarily limited to internal counseling sessions; leadership feedback mechanisms also apply in operational settings such as the CTCs.

C-3. Just as training includes AARs and training strategies to fix shortcomings, leadership development includes performance reviews.

These reviews result in agreements between leader and subordinate on a development strategy or plan of action that builds on the subordinate's strengths and establishes goals to improve on weaknesses. Leaders conduct performance reviews and create plans of action during developmental counseling.

C-4. Leadership development reviews are a component of the broader concept of developmental counseling. Developmental counseling is subordinate-centered communication that produces a plan outlining actions that subordinates must take to achieve individual and organizational goals. During developmental counseling, subordinates are not merely passive listeners; they're actively involved in the process. The Developmental Counseling Form (DA Form 4856-E, which is discussed at the end of this appendix) provides a useful framework to prepare for almost any type of counseling. Use it to help you mentally organize issues and isolate important, relevant items to cover during counseling sessions.

C-5. Developmental counseling is a shared effort. As a leader, you assist your subordinates in identifying strengths and weaknesses and creating plans of action. Then you support them throughout the plan implementation and assessment. However, to achieve success, your subordinates must be forthright in their commitment to improve and candid in their own assessment and goal setting.

THE LEADER'S RESPONSIBILITIES

C-6. Organizational readiness and mission accomplishment depend on every member's ability to perform to established standards. Supervisors must mentor their subordinates through teaching, coaching, and counseling. Leaders coach subordinates the same way sports coaches improve their teams: by identifying weaknesses, setting goals, developing and implementing plans of action, and providing oversight and motivation throughout the process. To be effective coaches, leaders must thoroughly understand the strengths, weaknesses, and professional goals of their subordinates. (Chapter 5 discusses coaching.)

C-7. Army leaders evaluate DA civilians using procedures prescribed under the Total Army Performance Evaluation System (TAPES). Although TAPES doesn't address developmental counseling, you can use DA Form 4856-E to counsel DA civilians concerning professional growth and career goals. DA Form 4856-E is not appropriate for documenting counseling concerning DA civilian misconduct or poor performance. The servicing civilian personnel office can provide guidance for such situations.

C-8. Soldiers and DA civilians often perceive counseling as an adverse action. Effective leaders who counsel properly can change that perception. Army leaders conduct counseling to help subordinates become better

members of the team, maintain or improve performance, and prepare for the future. Just as no easy answers exist for exactly what to do in all leadership situations, no easy answers exist for exactly what to do in all counseling situations. However, to conduct effective counseling, you should develop a counseling style with the characteristics listed in Figure C-1.

- **Purpose:** Clearly define the purpose of the counseling.
- **Flexibility:** Fit the counseling style to the character of each subordinate and to the relationship desired.
- **Respect:** View subordinates as unique, complex individuals, each with a distinct set of values, beliefs, and attitudes.
- **Communication:** Establish open, two-way communication with subordinates using spoken language, nonverbal actions, gestures, and body language. Effective counselors listen more than they speak.
- **Support:** Encourage subordinates through actions while guiding them through their problems.

Figure C-1. Characteristics of Effective Counseling

THE LEADER AS A COUNSELOR

C-9. Army leaders must demonstrate certain qualities to be effective counselors. These qualities include respect for subordinates, self-awareness and cultural awareness, empathy, and credibility.

RESPECT FOR SUBORDINATES

C-10. As an Army leader, you show respect for subordinates when you allow them to take responsibility for their own ideas and actions. Respecting subordinates helps create mutual respect in the leader-subordinate relationship. Mutual respect improves the chances of changing (or maintaining) behavior and achieving goals.

SELF AWARENESS AND CULTURAL AWARENESS

C-11. As an Army leader, you must be fully aware of your own values, needs, and biases prior to counseling subordinates. Self-aware leaders are less likely to project their biases onto subordinates. Also, aware leaders are more likely to act consistently with their own values and actions.

C-12. Cultural awareness, as discussed in Chapter 2, is a mental attribute. As an Army leader, you need to be aware of the similarities and differences between individuals of different cultural backgrounds and how these factors may influence values, perspectives, and actions. Don't let unfamiliarity with cultural backgrounds hinder you in addressing cultural issues, especially if they generate concerns within the organization or

hinder team-building. Cultural awareness enhances your ability to display empathy.

EMPATHY

C-13. Empathy is the action of being understanding of and sensitive to the feelings, thoughts, and experiences of another person to the point that you can almost feel or experience them yourself. Leaders with empathy can put themselves in their subordinate's shoes; they can see a situation from the other person's perspective. By understanding the subordinate's position, you can help a subordinate develop a plan of action that fits the subordinate's personality and needs, one that works for the subordinate. If you don't fully comprehend a situation from your subordinate's point of view, you have less credibility and influence and your subordinate is less likely to commit to the agreed upon plan of action.

CREDIBILITY

C-14. Leaders achieve credibility by being honest and consistent in their statements and actions. To be credible, use a straightforward style with your subordinates. Behave in a manner that your subordinates respect and trust. You can earn credibility by repeatedly demonstrating your willingness to assist a subordinate and being consistent in what you say and do. If you lack credibility with your subordinates, you'll find it difficult to influence them.

LEADER COUNSELING SKILLS

C-15. One challenging aspect of counseling is selecting the proper approach to a specific situation. To counsel effectively, the technique you use must fit the situation, your capabilities, and your subordinate's expectations. In some cases, you may only need to give information or listen. A subordinate's improvement may call for just a brief word of praise. Other situations may require structured counseling followed by definite actions.

C-16. All leaders should seek to develop and improve their own counseling abilities. You can improve your counseling techniques by studying human behavior, learning the kinds of problems that affect your subordinates, and developing your interpersonal skills. The techniques needed to provide effective counseling will vary from person to person and session to session. However, general skills that you'll need in almost every situation include active listening, responding, and questioning.

ACTIVE LISTENING

C-17. During counseling, you must actively listen to your subordinate. When you're actively listening, you communicate verbally and nonverbally that you've received the subordinate's message. To fully understand a subordinate's message, you must listen to the words and observe the

subordinate's manners. Elements of active listening you should consider include—

- **Eye contact.** Maintaining eye contact without staring helps show sincere interest. Occasional breaks of contact are normal and acceptable. Subordinates may perceive excessive breaks of eye contact, paper shuffling, and clock-watching as a lack of interest or concern. These are guidelines only. Based on cultural background, participants in a particular counseling session may have different ideas about what proper eye contact is.
- **Body posture.** Being relaxed and comfortable will help put the subordinate at ease. However, a too-relaxed position or slouching may be interpreted as a lack of interest.
- **Head nods.** Occasionally nodding your head shows you're paying attention and encourages the subordinate to continue.
- **Facial expressions.** Keep your facial expressions natural and relaxed. A blank look or fixed expression may disturb the subordinate. Smiling too much or frowning may discourage the subordinate from continuing.
- **Verbal expressions.** Refrain from talking too much and avoid interrupting. Let the subordinate do the talking while keeping the discussion on the counseling subject. Speaking only when necessary reinforces the importance of what the subordinate is saying and encourages the subordinate to continue. Silence can also do this, but be careful. Occasional silence may indicate to the subordinate that it's okay to continue talking, but a long silence can sometimes be distracting and make the subordinate feel uncomfortable.

C-18. Active listening also means listening thoughtfully and deliberately to the way a subordinate says things. Stay alert for common themes. A subordinate's opening and closing statements as well as recurring references may indicate the subordinate's priorities. Inconsistencies and gaps may indicate a subordinate's avoidance of the real issue. This confusion and uncertainty may suggest additional questions.

C-19. While listening, pay attention to the subordinate's gestures. These actions complete the total message. By watching the subordinate's actions, you can "see" the feelings behind the words. Not all actions are proof of a subordinate's feelings, but they should be taken into consideration. Note differences between what the subordinate says and does. Nonverbal indicators of a subordinate's attitude include—

- **Boredom.** Drumming on the table, doodling, clicking a ball-point pen, or resting the head in the palm of the hand.

- **Self-confidence.** Standing tall, leaning back with hands behind the head, and maintaining steady eye contact.
- **Defensiveness.** Pushing deeply into a chair, glaring at the leader, and making sarcastic comments as well as crossing or folding arms in front of the chest.
- **Frustration.** Rubbing eyes, pulling on an ear, taking short breaths, wringing the hands, or frequently changing total body position.
- **Interest, friendliness, and openness.** Moving toward the leader while sitting.
- **Openness or anxiety.** Sitting on the edge of the chair with arms uncrossed and hands open.

C-20. Consider these indicators carefully. Although each indicator may show something about the subordinate, don't assume a particular behavior absolutely means something. Ask the subordinate about the indicator so you can better understand the behavior and allow the subordinate to take responsibility for it.

RESPONDING

C-21. Responding skills follow-up on active listening skills. A leader responds to communicate that the leader understands the subordinate. From time to time, check your understanding: clarify and confirm what has been said. Respond to subordinates both verbally and nonverbal. Verbal responses consist of summarizing, interpreting, and clarifying the subordinate's message. Nonverbal responses include eye contact and occasional gestures such as a head nod.

QUESTIONING

C-22. Although questioning is a necessary skill, you must use it with caution. Too many questions can aggravate the power differential between a leader and a subordinate and place the subordinate in a passive mode. The subordinate may also react to excessive questioning as an intrusion of privacy and become defensive. During a leadership development review, ask questions to obtain information or to get the subordinate to think about a particular situation. Generally, the questions should be open-ended so as to evoke more than a yes or no answer. Well-posed questions may help to verify understanding, encourage further explanation, or help the subordinate move through the stages of the counseling session.

COUNSELING ERRORS

C-23. Effective leaders avoid common counseling mistakes. Dominating the counseling by talking too much, giving unnecessary or inappropriate "advice," not truly listening, and projecting personal likes, dislikes, biases, and prejudices all interfere with effective counseling. You should also avoid other common mistakes such as rash judgments, stereotypes, loss

of emotional control, inflexible methods of counseling and improper follow-up. To improve your counseling skills, follow the guidelines in Figure C-2.

- Determine the subordinate's role in the situation and what the subordinate has done to resolve the problem or improve performance.
- Draw conclusions based on more than the subordinate's statement.
- Try to understand what the subordinate says and feels; listen to what the subordinate says and how the subordinate says it.
- Show empathy when discussing the problem.
- When asking questions, be sure that you need the information.
- Keep the conversation open-ended; avoid interrupting.
- Give the subordinate your full attention.
- Be receptive to the subordinate's feelings without feeling responsible to save the subordinate from hurting.
- Encourage the subordinate to take the initiative and to say what the subordinate wants to say.
- Avoid interrogating.
- Keep your personal experiences out of the counseling session unless you believe your experiences will really help.
- Listen more; talk less.
- Remain objective.
- Avoid confirming a subordinate's prejudices.
- Help the subordinate help himself.
- Know what information to keep confidential and what to present to the chain of command.

Figure C-2. Guidelines to Improve Counseling

THE LEADER'S LIMITATIONS

C-24. Army leaders can't help everyone in every situation. Even professional counselors can't provide all the help that a person might need. You must recognize your limitations and, when the situation calls for it, refer a subordinate to a person or agency more qualified to help.

C-25. These agencies Figure C-3 lists can help you and your people resolve problems. Although it's generally in an individual's best interest to seek help first from their first-line leaders, leaders must always respect an individual's right to contact most of these agencies on their own.

Activity	Description
Adjutant General	Provides personnel and administrative services support such as orders, ID cards, retirement assistance, deferments, and in- and out-processing.

American Red Cross	Provides communications support between soldiers and families and assistance during or after emergency or compassionate situations.
Army Community Service	Assists military families through their information and referral services, budget and indebtedness counseling, household item loan closet, information on other military posts, and welcome packets for new arrivals.
Army Substance Abuse Program	Provides alcohol and drug abuse prevention and control programs for DA civilians.
Better Opportunities for Single Soldiers (BOSS)	Serves as a liaison between upper levels of command on the installation and single soldiers.
Army Education Center	Provides services for continuing education and individual learning services support.
Army Emergency Relief	Provides financial assistance and personal budget counseling; coordinates student loans through Army Emergency Relief education loan programs.
Career Counselor	Explains reenlistment options and provides current information on prerequisites for reenlistment and selective reenlistment bonuses.
Chaplain	Provides spiritual and humanitarian counseling to soldiers and DA civilians.
Claims Section, SJA	Handles claims for and against the government, most often those for the loss and damage of household goods.

Legal Assistance Office	Provides legal information or assistance on matters of contracts, citizenship, adoption, marital problems, taxes, wills, and powers of attorney.
Community Counseling Center	Provides alcohol and drug abuse prevention and control programs for soldiers.
Community Health Nurse	Provides preventive health care services.
Community Mental Health Service	Provides assistance and counseling for mental health problems.
Employee Assistance Program	Provides health nurse, mental health service, and social work services for DA civilians.
Equal Opportunity Staff office and Equal Employment Opportunity Office	Provides assistance for matters involving discrimination in race, color, national origin, gender, and religion. Provides, information on procedures for initiating complaints and resolving complaints informally.
Family Advocacy Officer	Coordinates programs supporting children and families including abuse and neglect investigation, counseling, and educational programs.
Finance and Accounting Office	Handles inquiries for pay, allowances, and allotments.
Housing Referral Office	Provides assistance with housing on and off post.
Inspector General	Renders assistance to soldiers and DA civilians. Corrects

	injustices affecting individuals and eliminates conditions determined to be detrimental to the efficiency, economy, morale, and reputation of the Army. Investigates matters involving fraud, waste, and abuse.
Social Work Office	Provides services dealing with social problems to include crisis intervention, family therapy, marital counseling, and parent or child management assistance.
Transition Office	Provides assistance and information on separation from the Army.

Figure C-3. Support Activities

TYPES OF DEVELOPMENTAL COUNSELING

C-26. You can often categorize developmental counseling based on the topic of the session. The two major categories of counseling are event-oriented and performance/professional growth.

EVENT-ORIENTED COUNSELING

C-27. Event-oriented counseling involves a specific event or situation. It may precede events, such as going to a promotion board or attending a school; or it may follow events, such as a noteworthy duty performance, a problem with performance or mission accomplishment, or a personal problem. Examples of event-oriented counseling include, but are not limited to—

- Specific instances of superior or substandard performance.
- Reception and integration counseling.
- Crisis counseling.
- Referral counseling.
- Promotion counseling.
- Separation counseling.

Counseling for Specific Instances

C-28. Sometimes counseling is tied to specific instances of superior or substandard duty performance. You tell your subordinate whether or not the performance met the standard and what the subordinate did right or wrong. The key to successful counseling for specific performance is to conduct it as close to the event as possible.

C-29. Many leaders focus counseling for specific instances on poor performance and miss, or at least fail to acknowledge, excellent performance. You should counsel subordinates for specific examples of superior as well as substandard duty performance. To measure your own performance and counseling emphasis, you can note how often you document counseling for superior versus substandard performance.

C-30. You should counsel subordinates who don't meet the standard. If the subordinate's performance is unsatisfactory because of a lack of knowledge or ability, you and the subordinate should develop a plan to improve the subordinate's skills. Corrective training may be required at times to ensure the subordinate knows and achieves the standard. Once the subordinate can achieve the standard, you should end the corrective training.

C-31. When counseling a subordinate for a specific performance, take the following actions:

- Tell the subordinate the purpose of the counseling, what was expected, and how the subordinate failed to meet the standard.
- Address the specific unacceptable behavior or action, not the person's character.
- Tell the subordinate the effect of the behavior, action, or performance on the rest of the organization.
- Actively listen to the subordinate's response.
- Remain unemotional.
- Teach the subordinate how to meet the standard.
- Be prepared to do some personal counseling, since a failure to meet the standard may be related to or the result of an unresolved personal problem.
- Explain to the subordinate what will be done to improve performance (plan of action). Identify your responsibilities in implementing the plan of action; continue to assess and follow up on the subordinate's progress. Adjust plan of action as necessary.

Reception and Integration Counseling

C-32. As the leader, you must counsel new team members when they arrive at your organization. This reception and integration counseling serves two purposes. First, it identifies and helps fix any problems or concerns that new members may have, especially any issues resulting from the new duty assignment. Second, it lets them know the organizational standards and how they fit into the team. It clarifies job titles and sends the message that the chain of command cares. Reception and integration counseling should begin immediately upon arrival so new team

members can quickly become integrated into the organization. (Figure C-4 gives some possible discussion points.)

- Organizational standards.
- Chain of command.
- NCO support channel (who and how used).
- On-and-off duty conduct.
- Personnel/personal affairs/initial clothing issue.
- Organizational history, organization, and mission.
- Soldier programs within the organization, such as soldier of the month/quarter/year and Audie Murphy.
- Off limits and danger areas.
- Functions and locations of support activities (see Figure C-3).
- On- and off-post recreational, educational, cultural, and historical opportunities.
- Foreign nation or host nation orientation.
- Other areas the individual should be aware of, as determined by the leader.

Figure C-4. Reception and Integration Counseling Points

Crisis Counseling

C-33. You may conduct crisis counseling to get a subordinate through the initial shock after receiving negative news, such as notification of the death of a loved one. You may assist the subordinate by listening and, as appropriate, providing assistance. Assistance may include referring the subordinate to a support activity or coordinating external agency support. Crisis counseling focuses on the subordinate's immediate, short-term needs.

Referral Counseling

C-34. Referral counseling helps subordinates work through a personal situation and may or may not follow crisis counseling. Referral counseling may also act as preventative counseling before the situation becomes a problem. Usually, the leader assists the subordinate in identifying the problem and refers the subordinate to the appropriate resource, such as Army Community Services, a chaplain, or an alcohol and drug counselor. (Figure C-3 lists support activities.)

Promotion Counseling

C-35. Leaders must conduct promotion counseling for all specialists and sergeants who are eligible for advancement without waivers but not recommended for promotion to the next higher grade. Army regulations require that soldiers within this category receive initial (event-oriented) counseling when they attain full eligibility and then periodic (performance/personal growth) counseling thereafter.

Adverse Separation Counseling

C-36. Adverse separation counseling may involve informing the soldier of the administrative actions available to the commander in the event substandard performance continues and of the consequences associated with those administrative actions (see AR 635-200).
C-37. Developmental counseling may not apply when an individual has engaged in more serious acts of misconduct. In those situations, you should refer the matter to the commander and the servicing staff judge advocate. When the leader's rehabilitative efforts fail, counseling with a view towards separation fills an administrative prerequisite to many administrative discharges and serves as a final warning to the soldier to improve performance or face discharge. In many situations, it may be beneficial to involve the chain of command as soon as you determine that adverse separation counseling might be required. A unit first sergeant or commander should be the person who informs the soldier of the notification requirements outlined in AR 635-200.

PERFORMANCE AND PROFESSIONAL GROWTH COUNSELING
Performance Counseling

C-38. During performance counseling, you conduct a review of a subordinate's duty performance during a certain period. You and the subordinate jointly establish performance objectives and standards for the next period. Rather than dwelling on the past, you should focus the session on the subordinate's strengths, areas needing improvement, and potential.

C-39. Performance counseling is required under the officer, NCO, and DA civilian evaluation reporting systems. The OER process requires periodic performance counseling as part of the OER Support Form requirements. Mandatory, face-to-face performance counseling between the rater and the rated NCO is required under the NCOERS. TAPES includes a combination of both of these requirements.

C-40. Counseling at the beginning of and during the evaluation period facilitates a subordinate's involvement in the evaluation process. Performance counseling communicates standards and is an opportunity for leaders to establish and clarify the expected values, attributes, skills, and actions. Part IVb (Leader Attributes/Skills/Actions) of the OER Support Form (DA Form 67-9-1) serves as an excellent tool for leaders doing performance counseling. For lieutenants and warrant officers one, the major performance objectives on the OER Support Form are used as the basis for determining the developmental tasks on the Junior Officer Developmental Support Form (DA Form 67-9-1a). Quarterly face-to-face performance and developmental counseling is required for these junior officers as outlined in AR 623-105.

C-41. As an Army leader, you must ensure you've tied your expectations to performance objectives and appropriate standards. You must establish standards that your subordinates can work towards and must teach them how to achieve the standards if they are to develop.

Professional Growth Counseling

C-42. Professional growth counseling includes planning for the accomplishment of individual and professional goals. You conduct this counseling to assist subordinates in achieving organizational and individual goals. During the counseling, you and your subordinate conduct a review to identify and discuss the subordinate's strengths and weaknesses and create a plan of action to build upon strengths and overcome weaknesses. This counseling isn't normally event-driven.

C-43. As part of professional growth counseling, you may choose to discuss and develop a "pathway to success" with the subordinate. This future-oriented counseling establishes short- and long-term goals and objectives. The discussion may include opportunities for civilian or military schooling, future duty assignments, special programs, and reenlistment options. Every person's needs are different, and leaders must apply specific courses of action tailored to each individual.

C-44. Career field counseling is required for lieutenants and captains before they're considered for promotion to major. Raters and senior raters, in conjunction with the rated officer, need to determine where the officer's skills best fit the needs of the Army. During career field counseling, consideration must be given to the rated officer's preference and his abilities (both performance and academic). The rater and senior rater should discuss career field designation with the officer prior to making a recommendation on the rated officer's OER.

C-45. While these categories can help you organize and focus counseling sessions, they should not be viewed as separate, distinct, or exhaustive. For example, a counseling session that focuses on resolving a problem may also address improving duty performance. A session focused on performance may also include a discussion on opportunities for professional growth. Regardless of the topic of the counseling session, leaders should follow the same basic format to prepare for and conduct it.

APPROACHES TO COUNSELING

C-46. An effective leader approaches each subordinate as an individual. Different people and different situations require different counseling approaches. Three approaches to counseling include nondirective, directive, and combined. These approaches differ in the techniques used, but they all fit the definition of counseling and contribute to its overall purpose. The major difference between the approaches is the degree to

which the subordinate participates and interacts during a counseling session. Figure C-5 summarizes the advantages and disadvantages of each approach.

NONDIRECTIVE

C-47. The nondirective approach is preferred for most counseling sessions. Leaders use their experienced insight and judgment to assist subordinates in developing solutions. You should partially structure this type of counseling by telling the subordinate about the counseling process and explaining what you expect.

C-48. During the counseling session, listen rather than make decisions or give advice. Clarify what's said. Cause the subordinate to bring out important points, so as to better understand the situation. When appropriate, summarize the discussion. Avoid providing solutions or rendering opinions; instead, maintain a focus on individual and organizational goals and objectives. Ensure the subordinate's plan of action supports those goals and objectives.

DIRECTIVE

C-49. The directive approach works best to correct simple problems, make on-the-spot corrections, and correct aspects of duty performance. The leader using the directive style does most of the talking and tells the subordinate what to do and when to do it. In contrast to the nondirective approach, the leader directs a course of action for the subordinate.

C-50. Choose this approach when time is short, when you alone know what to do, or if a subordinate has limited problem-solving skills. It's also appropriate when a subordinate needs guidance, is immature, or is insecure.

COMBINED

C-51. In the combined approach, the leader uses techniques from both the directive and nondirective approaches, adjusting them to articulate what's best for the subordinate. The combined approach emphasizes the subordinate's planning and decision-making responsibilities.

C-52. With your assistance, the subordinate develops the subordinate's own plan of action. You should listen, suggest possible courses, and help analyze each possible solution to determine its good and bad points. You should then help the subordinate fully understand all aspects of the situation and encourage the subordinate to decide which solution is best.

	Advantages	Disadvantages
Nondirective	• Encourages maturity. • Encourages open communication. • Develops personal responsibility.	• More time-consuming • Requires greatest counselor skill.
Directive	• Quickest method. • Good for people who need clear, concise direction. • Allows counselors to actively use their experience.	• Doesn't encourage subordinates to be part of the solution. • Tends to treat symptoms, not problems. • Tends to discourage subordinates from talking freely. • Solution is the counselor's, not the subordinate's.
Combined	• Moderately quick. • Encourages maturity. • Encourages open communication. • Allows counselors to actively use their experience.	• May take too much time for some situations.

Figure C-5. Counseling Approach Summary Chart

COUNSELING TECHNIQUES

C-53. As an Army leader, you may select from a variety of techniques when counseling subordinates. These counseling techniques, when appropriately used, cause subordinates to do things or improve upon their performance. You can use these methods during scheduled counseling sessions or while simply coaching a subordinate. Counseling techniques you can use during the nondirective or combined approaches include—

- **Suggesting alternatives.** Discuss alternative actions that the subordinate may take, but both you and the subordinate decide which course of action is most appropriate.

- **Recommending.** Recommend one course of action, but leave the decision to accept the recommended action to the subordinate.
- **Persuading.** Persuade the subordinate that a given course of action is best, but leave the decision to the subordinate. Successful persuasion depends on the leader's credibility, the subordinate's willingness to listen, and their mutual trust.
- **Advising.** Advise the subordinate that a given course of action is best. This is the strongest form of influence not involving a command.

C-54. Some techniques you can use during the directive approach to counseling include—

- **Corrective training.** Teach and assist the subordinate in attaining and maintaining the standards. The subordinate completes corrective training when the subordinate attains the standard.
- **Commanding.** Order the subordinate to take a given course of action in clear, exact words. The subordinate understands that he has been given a command and will face the consequences for failing to carry it out.

THE COUNSELING PROCESS

C-55. Effective leaders use the counseling process. It consists of four stages:

- Identify the need for counseling.
- Prepare for counseling.
- Conduct counseling.
- Follow up.

IDENTIFY THE NEED FOR COUNSELING

C-56. Quite often organizational policies, such as counseling associated with an evaluation or counseling required by the command, focus a counseling session. However, you may conduct developmental counseling whenever the need arises for focused, two-way communication aimed at subordinate development. Developing subordinates consists of observing the subordinate's performance, comparing it to the standard, and then providing feedback to the subordinate in the form of counseling.

PREPARE FOR COUNSELING

C-57. Successful counseling requires preparation. To prepare for counseling, do the following:

- Select a suitable place.
- Schedule the time.
- Notify the subordinate well in advance.

- Organize information.
- Outline the counseling session components.
- Plan your counseling strategy.
- Establish the right atmosphere.

Select a Suitable Place

C-58. Schedule counseling in an environment that minimizes interruptions and is free from distracting sights and sounds.

Schedule the Time

C-59. When possible, counsel a subordinate during the duty day. Counseling after duty hours may be rushed or perceived as unfavorable. The length of time required for counseling depends on the complexity of the issue. Generally a counseling session should last less than an hour. If you need more time, schedule a second session. Additionally, select a time free from competition with other activities and consider what has been planned after the counseling session. Important events can distract a subordinate from concentrating on the counseling.

Notify the Subordinate Well in Advance

C-60. For a counseling session to be a subordinate-centered, two-person effort, the subordinate must have time to prepare for it. The subordinate should know why, where, and when the counseling will take place. Counseling following a specific event should happen as close to the event as possible. However, for performance or professional development counseling, subordinates may need a week or more to prepare or review specific products, such as support forms or counseling records.

Organize Information

C-61. Solid preparation is essential to effective counseling. Review all pertinent information. This includes the purpose of the counseling, facts and observations about the subordinate, identification of possible problems, main points of discussion, and the development of a plan of action. Focus on specific and objective behaviors that the subordinate must maintain or improve as well as a plan of action with clear, obtainable goals.

Outline the Components of the Counseling Session

C-62. Using the information obtained, determine what to discuss during the counseling session. Note what prompted the counseling, what you aim to achieve, and what your role as a counselor is. Identify possible comments or questions to help you keep the counseling session subordinate-centered and help the subordinate progress through its stages. Although you never know what a subordinate will say or do during counseling, a written outline helps organize the session and enhances the chance of positive results. (Figure C-6 is one example of a counseling

outline prepared by a platoon leader about to conduct an initial NCOER counseling session with a platoon sergeant.)

Type of counseling: Initial NCOER counseling for SFC Taylor, a recently promoted new arrival to the unit.

Place and time: The platoon office, 1500 hours, 9 October.

Time to notify the subordinate: Notify SFC Taylor one week in advance of the scheduled counseling session.

Subordinate preparation: Have SFC Taylor put together a list of goals and objectives he would like to complete over the next 90 to 180 days. Review the values, attributes, skills, and actions from FM 22-100.

Counselor preparation:

- Review the NCO Counseling Checklist/Record (DA Form 2166-8-1).
- Update or review SFC Taylor's duty description and fill out the rating chain and duty description on the working copy of the NCOER (DA Form 2166-8, Parts II and III).
- Review each of the values and responsibilities in Part IV of the NCOER and the values, attributes, skills and actions in FM 22-100. Think of how each applies to SFC Taylor and the platoon sergeant position.
- Review the actions you consider necessary for a success or excellence in each value and responsibility.
- Make notes in blank spaces in Part IV of the NCOER to assist when counseling.

Role as counselor: Help SFC Taylor to understand the expectations and standards associated with the platoon sergeant position. Assist SFC Taylor in developing the values, attributes, skills, and actions that will enable him to achieve his performance objectives, consistent with those of the platoon and company. Resolve any aspects of the job that aren't clearly understood.

Session outline: Complete an outline following the counseling session components in Figure C-7 and based on the draft duty description on the NCOER, ideally at least two to three days prior to the actual counseling session.

Figure C-6. Example of a Counseling Outline

Plan Counseling Strategy

C-63. As many approaches to counseling exist as there are leaders. The directive, nondirective, and combined approaches to counseling were addressed earlier. Use a strategy that suits your subordinates and the situation.

Establish the Right Atmosphere

C-64. The right atmosphere promotes two-way communication between a leader and subordinate. To establish a relaxed atmosphere, you may offer the subordinate a seat or a cup of coffee. You may want to sit in a chair facing the subordinate since a desk can act as a barrier.

C-65. Some situations make an informal atmosphere inappropriate. For example, during counseling to correct substandard performance, you may direct the subordinate to remain standing while you remain seated behind a desk. This formal atmosphere, normally used to give specific guidance, reinforces the leader's rank, position in the chain of command, and authority.

CONDUCT THE COUNSELING SESSION

C-66. Be flexible when conducting a counseling session. Often counseling for a specific incident occurs spontaneously as leaders encounter subordinates in their daily activities. Such counseling can occur in the field, motor pool, barracks—wherever subordinates perform their duties. Good leaders take advantage of naturally occurring events to provide subordinates with feedback.

C-67. Even when you haven't prepared for formal counseling, you should address the four basic components of a counseling session. Their purpose is to guide effective counseling rather than mandate a series of rigid steps. Counseling sessions consist of—

- Opening the session.
- Discussing the issues.
- Developing the plan of action.
- Recording and closing the session.

Ideally, a counseling session results in a subordinate's commitment to a plan of action. Assessment of the plan of action (discussed below) becomes the starting point for follow-up counseling. (Figure C-7 is an example of a counseling session.)

Open the Session

C-68. In the session opening, state the purpose of the session and establish a subordinate-centered setting. Establish the preferred setting early in the session by inviting the subordinate to speak. The best way to open a counseling session is to clearly state its purpose. For example, an appropriate purpose statement might be: "The purpose of this counseling is to discuss your duty performance over the past month and to create a plan to enhance performance and attain performance goals." If applicable, start the counseling session by reviewing the status of the previous plan of action.

C-69. You and the subordinate should attempt to develop a mutual understanding of the issues. You can best develop this by letting the subordinate do most of the talking. Use active listening; respond, and question without dominating the conversation. Aim to help the subordinate better understand the subject of the counseling, for example, duty performance, a problem situation and its impact, or potential areas for growth.

C-70. Both you and the subordinate should provide examples or cite specific observations to reduce the perception that either is unnecessarily biased or judgmental. However, when the issue is substandard performance, you should make clear how the performance didn't meet the standard. The conversation, which should be two-way, then addresses what the subordinate needs to do to meet the standard. It's important that you define the issue as substandard performance and don't allow the subordinate to define the issue as an unreasonable standard—unless you consider the standard negotiable or are willing to alter the conditions under which the subordinate must meet the standard.

Develop a Plan of Action

C-71. A plan of action identifies a method for achieving a desired result. It specifies what the subordinate must do to reach the goals set during the counseling session. The plan of action must be specific: it should show the subordinate how to modify or maintain his behavior. It should avoid vague intentions such as "Next month I want you to improve your land navigation skills." The plan must use concrete and direct terms. For example, you might say: "Next week you'll attend the map reading class with 1st Platoon. After the class, SGT Dixon will coach you through the land navigation course. He will help you develop your skill with the compass. I will observe you going through the course with SGT Dixon, and then I will talk to you again and determine where and if you still need additional training." A specific and achievable plan of action sets the stage for successful development.

Record and Close the Session

C-72. Although requirements to record counseling sessions vary, a leader always benefits by documenting the main points of a counseling session. Documentation serves as a reference to the agreed upon plan of action and the subordinate's accomplishments, improvements, personal preferences, or problems. A complete record of counseling aids in making recommendations for professional development, schools, promotions, and evaluation reports.

C-73. Additionally, Army regulations require written records of counseling for certain personnel actions, such as a barring a soldier from reenlisting, processing a soldier for administrative separation, or placing a soldier in the overweight program. When a soldier faces involuntary separation, the leader must take special care to maintain accurate counseling records. Documentation of substandard actions conveys a strong corrective message to subordinates.

C-74. To close the session, summarize its key points and ask if the subordinate understands the plan of action. Invite the subordinate to review the plan of action and what's expected of you, the leader. With the subordinate, establish any follow-up measures necessary to support the successful implementation of the plan of action. These may include providing the subordinate with resources and time, periodically assessing the plan, and following through on referrals. Schedule any future meetings, at least tentatively, before dismissing the subordinate.

FOLLOW UP

Leader's Responsibilities

C-75. The counseling process doesn't end with the counseling session. It continues through implementation of the plan of action and evaluation of results. After counseling, you must support subordinates as they implement their plans of action. Support may include teaching, coaching, or providing time and resources. You must observe and assess this process and possibly modify the plan to meet its goals. Appropriate measures after counseling include follow-up counseling, making referrals, informing the chain of command, and taking corrective measures.

Assess the Plan of Action

C-76. The purpose of counseling is to develop subordinates who are better able to achieve personal, professional, and organizational goals. During the assessment, review the plan of action with the subordinate to determine if the desired results were achieved. You and the subordinate should determine the date for this assessment during the initial counseling session. The assessment of the plan of action provides useful information for future follow-up counseling sessions.

Open the Session

- Establish a relaxed environment. Explain to SFC Taylor that the more one discusses and understands Army values and leader attributes, skills, and actions, the easier it is to develop and incorporate them into an individual leadership style.
- State the purpose of the counseling session. Explain that the initial counseling is based on leader actions (what SFC Taylor needs to do to be a successful platoon sergeant) and not on professional developmental needs (what SFC Taylor needs to do to develop further as an NCO).
- Come to an agreement on the duty description, the meaning of each value and responsibility, and the standards for success and excellence for each value and responsibility. Explain that subsequent counseling will focus on SFC Taylor's developmental needs as well as how well SFC Taylor is meeting the jointly agreed upon performance objectives. Instruct SFC Taylor to perform a self-assessment during the next quarter to identify his developmental needs.
- Ensure SFC Taylor knows the rating chain. Resolve any questions that SFC Taylor has about the job. Discuss the team relationship that exists between a platoon leader and a platoon sergeant and the importance of two-way communication between them.

Discuss the issue

- Jointly review the duty description on the NCOER, including the maintenance, training, and taking care of soldiers' responsibilities. Mention that the duty description can be revised as necessary. Highlight areas of special emphasis and appointed duties.
- Discuss the meaning of each value and responsibility on the NCOER. Discuss the values, attributes, skills, and actions outlined in FM 22-100. Ask open-ended questions to see if SFC Taylor can relate these items to his role as a platoon sergeant.
- Explain that even though the developmental tasks focus on developing leader actions, character development forms the basis for leadership development. Character and actions can't be viewed as separate; they're closely linked. In formulating the plan of action to accomplish major performance objectives, the proper values, attributes, and skills form the basis for the plan. As such, character development must be incorporated into the plan of action.

Assist in Developing a Plan of Action (During the Counseling Session)

- Ask SFC Taylor to identify actions that will facilitate the accomplishment of the major performance objectives. Categorize each action into one of the values or responsibilities listed on the NCOER.

- Discuss how each value and responsibility applies to the platoon sergeant position. Discuss specific examples of success and excellence in each value and responsibility block. Ask SFC Taylor for suggestions to make the goals more objective, specific, and measurable.
- Ensure that SFC Taylor has at least one example of a success or excellence bullet listed under each value and responsibility.
- Discuss SFC Taylor's promotion goals and ask him what he considers to be his strengths and weaknesses. Obtain copies of the last two master sergeant selection board results and match his goals and objectives to these.

Close the Session

- Check SFC Taylor's understanding of the duty description and performance objectives.
- Stress the importance of teamwork and two-way communication.
- Ensure SFC Taylor understands that you expect him to assist in your development as a platoon leader. This means that both of you have the role of teacher and coach.
- Remind SFC Taylor to perform a self-assessment during the next quarter.
- Set a tentative date during the next quarter for the routinely scheduled follow-up counseling.

Notes on Strategy

- Facilitate answering any questions SFC Taylor may have.
- Expect SFC Taylor to be uncomfortable with the terms and the developmental process; respond in a way that encourages participation throughout the session.

Figure C-7. Example of a Counseling Session

SUMMARY

C-77. This appendix has discussed developmental counseling. Developmental counseling is subordinate-centered communication that outlines actions necessary for subordinates to achieve individual and organizational goals and objectives. It can be either event-oriented or focused on personal and professional development. Figure C-8 summarizes the major aspects of developmental counseling and the counseling process.

Leaders must demonstrate these qualities to counsel effectively:	The Counseling Process 1. **Identify the need for counseling.**

- Respect for subordinates.
- Self and cultural awareness.
- Credibility.
- Empathy.

Leaders must possess these counseling skills:

- Active listening.
- Responding.
- Questioning.

Effective leaders avoid common counseling mistakes. Leaders should avoid the influence of—

- Personal bias.
- Rash judgments.
- Stereotyping.
- Losing emotional control.
- Inflexible counseling methods.
- Improper follow-up.

2. **Prepare for counseling.**

- Select a suitable place.
- Schedule the time.
- Notify the subordinate well in advance.
- Organize information.
- Outline the components of the counseling session.
- Plan counseling strategy.
- Establish the right atmosphere.

3. **Conduct the counseling session.**

- Open the session.
- Discuss the issue.
- Develop a plan of action (to include the leader's responsibilities).
- Record and close the session.

4. **Follow up.**

- Support plan of action implementation
- Assess the plan of action.

Figure C-8. A Summary of Developmental Counseling

THE DEVELOPMENTAL COUNSELING FORM

C-78. The Developmental Counseling Form (DA Form 4856-E) is designed to help Army leaders conduct and record counseling sessions. Figure C-9 shows a completed DA Form 4856-E documenting the counseling of a young soldier with financial problems. While this is an example of a derogatory counseling, you can see that it is still developmental. Leaders must decide when counseling, additional training, rehabilitation, reassignment, or other developmental options have been exhausted. If the purpose of a counseling session is not developmental, refer to paragraphs C-36 and C-37. Figure C-10 shows a routine performance/professional growth counseling for a unit first sergeant. Figure C-11 shows a blank form with instructions on how to complete each block.

DEVELOPMENTAL COUNSELING FORM
For use of this form see FM 22-100

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)
PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
DISCLOSURE: Disclosure is voluntary.

PART I - ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank / Grade	Social Security No.	Date of Counseling
Lloyd, Andrew	*PFC*	*123-45-6789*	*28 March 1997*

Organization	Name and Title of Counselor
2nd Platoon, B Battery, 1 - 1 ADA Bn	*SGT Mark Levy, Squad Leader*

PART II - BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g. performance/professional or event-oriented counseling and includes the leader's facts and observations prior to the counseling):

The purpose of this counseling is to inform PFC Lloyd of his responsibility to manage his financial affairs and the potential consequences of poorly managing finances and to help PFC Lloyd develop a plan of action to resolve his financial problems.

Facts: The battery commander received notice of delinquent payment on PFC Lloyd's Deferred Payment Plan (DPP).

A payment of $86.00 is 45 days delinquent

PART III - SUMMARY OF COUNSELING
Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

PFC Lloyd, late payments on a DPP account reflect a lack of responsibility and poor managing of finances. You should know that the letter of lateness has been brought to the attention of the battery commander, the first sergeant, and the platoon sergeant. They're all questioning your ability to manage your personal affairs. I also remind you that promotions and awards are based more than on just performing MOS-related duties; soldiers must act professionally and responsibly in all areas. Per conversation with PFC Lloyd, the following information was obtained:

He didn't make the DPP payment due to a lack of funds in his checking account. His most recent long distance phone bill was over $220 due to calling his house concerning his grandmother's failing health. PFC Lloyd stated that he wanted to pay for the phone calls himself in order not to burden his parents with the expense of collect calls. He also stated that his calling had tapered down considerably and he expects this month's phone bill to be approximately $50. We made an appointment at ACS and ACS came up with the following information:

PFC Lloyd's monthly obligations: Car payment: $330
Car insurance: $138
Rent including utilities: $400
Other credit cards: $0
Total monthly obligations: $868.00
Monthly take-home pay: $1232.63

We discussed that with approximately $364 available for monthly living expenses, a phone bill in excess of $200 will severely affect PFC Lloyd's financial stability and can't continue. We discussed the need for PFC Lloyd to establish a savings account to help cover emergency expenses. PFC Lloyd agreed that his expensive phone bill and his inability to make the DPP payment is not responsible behavior. He confirmed that he wants to get his finances back on track and begin building a savings account.

OTHER INSTRUCTIONS
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or retirement. For separation requirements and notification of loss of benefits/consequences, see local directives and AR 635-200.

DA FORM 4856-E, JUN 99 EDITION OF JUN 85 IS OBSOLETE

Figure C-9. Example of a Developmental Counseling Form—Event Counseling

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goals(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specific time line for implementation and assessment (Part IV below)).

Based on our discussion, PFC Lloyd will be able to resume normal payment on his DPP account next month (assuming that his phone bill is approximately $50). PFC Lloyd agreed to contact the DPP office and provide a partial payment of $20 immediately. He agreed to exercise self-restraint and not make long distance calls as frequently. He decided that his goal is to make one ten-minute phone call every two weeks. He will write letters to express concern over his grandmother's condition and ask his parents to do the same to keep him informed. His long-term goal is to establish a savings account with a goal of contributing $50 a month.

PFC Lloyd also agreed to attend the check cashing class at ACS on 2, 9, and 16 April.

Assessment date: 27 June

Session Closing: (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate).

Individual counseled: I agree/~~disagree~~ with the information above

Individual counseled remarks:

Signature of Individual Counseled: *Andrew Lloyd* Date: *28 March 1997*

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

PFC Lloyd will visit the DPP office to make an immediate partial payment of $20 and will give me a copy of the receipt as soon as the payment is made. PFC Lloyd will also provide me with a copy of the next month's phone bill and DPP payment receipt.
PFC Lloyd's finances will be a key topic of discussion at his next monthly counseling session.

Signature of Counselor: *Mark Levy* Date: *28 March 1997*

PART IV - ASSESSMENT OF THE PLAN OF ACTION

Assessment (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling):

Counselor: _____ Individual Counseled: _____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DA FORM 4856-E (Reverse)

Figure C-9. Example of a Developmental Counseling Form—Event Counseling (Reverse)

DEVELOPMENTAL COUNSELING FORM
For use of this form see FM 22-100

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)
PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
DISCLOSURE: Disclosure is voluntary.

PART I - ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank / Grade	Social Security No.	Date of Counseling
McDonald, Stephen	*1SG*	*333-33-3333*	*13 March 1998*

Organization	Name and Title of Counselor
D Company, 3–95th IN	*CPT Peterson, Company Commander*

PART II - BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g. performance/professional or event-oriented counseling and includes the leader's facts and observations prior to the counseling):

- *To discuss duty performance for the period 19 Dec 97 to 11 March 1998.*
- *To discuss short-range professional growth goals/plan for next year.*
- *Talk about long-range professional growth (2-5 years) goals.*

PART III - SUMMARY OF COUNSELING
Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

- *Performance (sustain):*
- *Emphasized safety and knowledge of demolition, tactical proficiency on the Platoon Live Fire Exercises.*
- *Took charge of company defense during the last major field training exercise; outstanding integration and use of engineer, heavy weapons, and air defense artillery assets. Superb execution of defense preparations and execution.*
- *No dropped white cycle taskings.*
- *Good job coordinating with battalion adjutant on legal and personnel issues.*
- *Continue to take care of soldiers, keep the commander abreast of problems.*
- *Focused on subordinate NCO development; right man for the right job.*

Improve:

- *Get NCODPs on the calendar.*
- *Hold NCOs to standard on sergeants time training.*

OTHER INSTRUCTIONS
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

DA FORM 4856-E, JUN 99 EDITION OF JUN 85 IS OBSOLETE

Figure C-10. Example of a Developmental Counseling Form—Performance/Professional Growth Counseling

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goals(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specific time line for implementation and assessment (Part IV below)).

- *Developmental Plan (next year):*
- *Develop a yearlong plan for NCODPs; coordinate to place on the calendar and training schedules.*
- *Resume civilian education; correspondence courses.*
- *Develop a company soldier of the month competition.*
- *Assist the company XO in modularizing the supply room for quick, efficient load-outs.*
- *Put in place a program to develop Ranger School candidates.*

Long-range goals (2 to 5 years):

- *Earn bachelor's degree.*
- *Attend and graduate the Sergeant Majors Academy.*

Session Closing: (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate).

Individual counseled: I agree/~~disagree~~ with the information above

Individual counseled remarks:

Signature of Individual Counseled: 1SG McDonald Date: *13 March 1998*

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

- *Coordinate with the 1SG on scheduling of NCODPs and soldier of the month boards.*
- *Have the XO meet with the 1SG on developing a plan for modularizing and improving the supply room.*
- *Provide time for Ranger candidate program.*

Signature of Counselor: *Mark Levy* Date: *28 March 1997*

PART IV - ASSESSMENT OF THE PLAN OF ACTION

Assessment (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling):

1SG McDonald has enrolled in an associates degree program at the University of Kentucky. The supply room received all green evaluations during the last command inspection. Five of seven Ranger applicants successfully completed Ranger School, exceeding the overall course completion rate of 39%. Monthly soldier of the month boards proved to be impractical because of the OPTEMPO; however, the company does now hold quarterly boards during the white cycle. Brigade command sergeant major commented favorably on the last company NCODP he attended and gave the instructor a brigade coin.

Counselor: *CPT Peterson* Individual Counseled: *1SG McDonald* Date of Assessment: *1 Aug 98*

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DA FORM 4856-E (Reverse)

Figure C-10. Example of a Developmental Counseling Form—Performance/Professional Growth Counseling (Reverse)

DEVELOPMENTAL COUNSELING FORM
For use of this form see FM 22-100

DATA REQUIRED BY THE PRIVACY ACT OF 1974

AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)
PRINCIPAL PURPOSE: To assist leaders in conducting and recording counseling data pertaining to subordinates.
ROUTINE USES: For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.
DISCLOSURE: Disclosure is voluntary.

PART I - ADMINISTRATIVE DATA

Name (Last, First, MI)	Rank / Grade	Social Security No.	Date of Counseling
Organization		Name and Title of Counselor	

PART II - BACKGROUND INFORMATION

Purpose of Counseling: (Leader states the reason for the counseling, e.g. performance/professional or event-oriented counseling and includes the leader's facts and observations prior to the counseling):

See paragraph C-68, Open the Session

The leader should annotate pertinent, specific, and objective facts and observations made. If applicable, the leader and subordinate start the counseling session by reviewing the status of the previous plan of action.

PART III - SUMMARY OF COUNSELING
Complete this section during or immediately subsequent to counseling.

Key Points of Discussion:

See paragraphs C-69 and C-70, Discuss the Issues.

The leader and subordinate should attempt to develop a mutual understanding of the issues. Both the leader and the subordinate should provide examples or cite specific observations to reduce the perception that either is unnecessarily biased or judgmental.

OTHER INSTRUCTIONS
This form will be destroyed upon: reassignment (other than rehabilitative transfers), separation at ETS, or upon retirement. For separation requirements and notification of loss of benefits/consequences see local directives and AR 635-200.

DA FORM 4856-E, JUN 99 EDITION OF JUN 85 IS OBSOLETE

Figure C-11. Guidelines on Completing a Developmental Counseling Form

Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goals(s). The actions must be specific enough to modify or maintain the subordinate's behavior and include a specific time line for implementation and assessment (Part IV below)).

See paragraph C-71, Develop a Plan of Action

The plan of action specifies what the subordinate must do to reach the goals set during the counseling session. The plan of action must be specific and should contain the outline, guideline(s), and time line that the subordinate follows. A specific and achievable plan of action sets the stage for successful subordinate development.

Remember, event-oriented counseling with corrective training as part of the plan of action can't be tied to a specified time frame. Corrective training is complete once the subordinate attains the standard.

Session Closing: (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate).

Individual counseled: I agree/ disagree with the information above

Individual counseled remarks:

See paragraph C-72 through C-74, Close the Session

Signature of Individual Counseled:_____ Date: _____

Leader Responsibilities: (Leader's responsibilities in implementing the plan of action).

See paragraph C76, Leader's Responsibilities

To accomplish the plan of action, the leader must list the resources necessary and commit to providing them to the soldier.

Signature of Counselor: _____ Date:_____

PART IV - ASSESSMENT OF THE PLAN OF ACTION

Assessment (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling):

The assessment of the plan of action provides useful information for future follow-up counseling. This block should be completed prior to the start of a follow-up counseling session. During an event-oriented counseling session, the counseling session is not complete until this block is completed.

During performance/professional growth counseling, this block serves as the starting point for future counseling sessions. Leaders must remember to conduct this assessment based on resolution of the situation or the established time line discussed in the plan of action block above.

Counselor:_____ Individual Counseled:_____ Date of Assessment: _____

Note: Both the counselor and the individual counseled should retain a record of the counseling.

DA FORM 4856-E (Reverse)

Figure C-11. Guidelines on Completing a Developmental Counseling Form (Reverse)

Tab 20

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Standard 20 Reference Excerpts

AR 670-1, para 1-9a, Uniforms.

1–9. Uniform appearance and fit

a. Appearance.

(1) All personnel will maintain a high standard of dress and appearance. Uniforms will fit properly; trousers, pants, or skirts should not fit tightly; and personnel must keep uniforms clean and serviceable and press them as necessary. Soldiers must project a military image that leaves no doubt that they live by a common military standard and are responsible to military order and discipline. Soldiers will ensure that articles carried in pockets, such as wallets, checkbooks, combs, and keys, do not protrude from the pocket or present a bulky appearance.

(2) Wear of items on uniforms.

(a) When required and prescribed by the commander, soldiers may attach keys or key chains to the uniform when performing duties such as charge of quarters, armorer, duty officer/NCO, or other duties as prescribed by the commander. Keys or key chains will be attached to the uniform on the belt, belt loops, or waistband.

(b) At the discretion of the commander, and when required in the performance of duties listed above, soldiers may wear an electronic device on the belt, belt loops, or waistband of the uniform. Only one electronic device may be worn; it may be either a pager or a cell phone. The body of the device may not exceed 4x2x1 inches, and the device and carrying case must be black; no other colors are authorized. If security cords or chains are attached to the device, soldiers will conceal the cord or chain from view. Other types of electronic devices are not authorized for wear on the uniform. If the commander issues and requires the use of other electronic devices in the performance of duties, the soldier will carry them in the hand, pocket, briefcase, purse, bag, or in some other carrying container.

(c) Soldiers will not wear keys, key chains, or electronic devices on the uniform when the commander determines such wear is inappropriate, such as in formation, or during parades or ceremonies. Soldiers will not wear items or devices on the uniform when not performing required duties.

(3) While in uniform, personnel will not place their hands in their pockets, except momentarily to place or retrieve objects. Soldiers will keep uniforms buttoned, zipped, and snapped. They will ensure metallic devices such as metal insignia, belt buckles, and belt tips are free of scratches and corrosion and are in proper luster or remain properly

subdued, as applicable; and that all medals and ribbons are clean and not frayed. Personnel will keep shoes and boots
cleaned and shined. Soldiers will replace the insignia listed in AR 700–84, paragraph 5–5, when it becomes unserviceable
or no longer conforms to standards.

(4) Lapels and sleeves of service, dress, and mess coats and jackets will be roll-pressed, without creasing. Skirts will
not be creased. Trousers, slacks, and the sleeves of shirts and blouses will be creased. Soldiers may add military
creases to the AG shade 415 shirt and the BDU coat (not the field jacket). Personnel will center the front creases on
each side of the shirt, centered on the pockets, for those garments that have front pockets. Soldiers may press a
horizontal crease across the upper back of the shirt or coat (not necessary on the male shirt due to the yoke seam), and
they may press three equally spaced vertical creases down the back, beginning at the yoke seam or the horizontal
crease. Additionally, personnel may crease the sleeves of the battle dress uniform (BDU) coat. Personnel are not
authorized to sew military creases into the uniform.

(5) Although some uniform items are made of wash-and-wear materials or are treated with a permanent-press finish,
soldiers may need to press these items to maintain a neat, military appearance. However, before pressing uniform
items, soldiers should read and comply with care instruction labels attached to the items. Soldiers may starch BDUs
and the maternity work uniform, at their option. Commanders will not require soldiers to starch these uniforms, and
soldiers will not receive an increase in their clothing replacement allowance to compensate for potential premature
wear that may be caused by starching uniforms.

b. Fit. Fitting instructions and alterations of uniforms will be made in accordance with AR 700–84 and TM 10–227.
The following is a summary of general fitting guidelines.

(1) Black all-weather coat.

(a) Males. The length of the sleeves of the all-weather coat will be 1.2 inch longer than the service coat. The bottom
of the black all weather coat will reach to a point 11.2 inches below the center of the knee.

(b) Females. The length of the sleeves of the all-weather coat will be 1.2 inch longer than the service coat. The
bottom of the coat will reach a point at least 1 inch below the skirt hem, but not less than 11.2 inches below the center
of the knee.

(2) Uniform coats and jackets (male and female). The sleeve length will be 1 inch below the bottom of the wrist bone.

(3) Trousers and slacks.

(a) Trousers will be fitted and worn with the lower edge of the waistband at the top of the hipbone, plus or minus 1.2 inch. The front crease of the trousers will reach the top of the instep, touching the top of the shoe at the shoelaces. Trousers will be cut on a diagonal line to reach a point approximately midway between the top of the heel and the top of the standard shoe in the back. The trousers may have a slight break in the front.

(b) Slacks will be fitted and worn so that the center of the waistband is at the natural waistline. The front crease of the slacks will reach the top of the instep, touching the top of the foot or the shoe at the shoelaces. Slacks will be cut on a diagonal line to reach a point approximately midway between the top of the heel and the top of the standard shoe in the back. The slacks may have a slight break in the front.

(4) Knee-length skirts. Skirt lengths will be no more than 1 inch above or 2 inches below the center of the knee.

(5) Long-sleeved shirts. The sleeve length will extend to the center of the wrist bone.

(6) Other. Personnel will wear appropriate undergarments with all uniforms, in accordance with paragraph 27–28.

TR 350-6, para 2-5, Initial Entry Training environment.

a. An effective soldierization program results from the IET soldier's total immersion in a positive environment established and sustained by active, involved leadership. This environment sets high standards, provides positive role models, and uses every training opportunity to reinforce essential soldier skills. Initial Entry Training begins with the soldier's arrival at the training company on Reception and Integration Day, and continues through AIT or OSUT graduation. Officer and NCO leadership is the cornerstone of a positive IET environment and a successful soldierization program.

b. Investment strategy in IET.

(1) The U.S. Army's motivated and professional IET cadre can train almost anyone who has the mental and physical capacity to complete IET. Each cadre member accepts responsibility for providing a positive environment in which new soldiers have every opportunity to succeed.

(2) Cadre will train their soldiers by building on and affirming their strengths and shoring up their weaknesses. It is imperative that unit cadre establish high standards of performance and insist their soldiers meet these standards. Cadre members coach, mentor, and assist their soldiers in meeting the standards through performance counseling and phase goal setting. Discharging soldiers because they fail to meet certain standards, when additional coaching could bring them up to par, is not in

keeping with the intent of the investment strategy. The investment strategy raises the individual to the standard; it does not lower the standard for the individual.

TR 350-6, para 3-1, Initial Entry Training strategy. Initial Entry Training commanders and commandants will ensure their training programs incorporate the following tenets of TRADOC's IET strategy:

a. The chain-of-command is responsible for training. Commanders must ensure that training meets POI standards and conforms to TRADOC policies on the conduct of training.

b. Drill sergeants will conduct as much of the skill training as possible in BCT and OSUT. When drill sergeants are the primary trainers, the role of the committee group will be to augment cadre instructors, serve as subject matter experts (SME), and advise on the conduct of training.

c. Primarily, SMEs will conduct MOS training; however, to the maximum extent feasible, drill sergeants will be involved in the technical training in AIT. *Drill sergeants are the MOS role models. They will assist with MOS skill practice and will, at times, be assigned additional duties as assistant instructors to augment SME instruction.* Academic instructors must assist unit cadre in the soldierization effort.

d. Cadre must be proficient in the tasks trained. Initial Entry Training commanders will establish certification programs IAW paragraph 3-6c to ensure that cadre have the competence and skill proficiency to execute and evaluate effective training.

e. Military occupational specialty training must be taught in as realistic an environment as possible. Scenario-driven FTXs are used to achieve this realism. These FTXs should focus on the warfighting application of acquired MOS skills and reinforce basic combat and teamwork skills.

f. Through a system of rigorous evaluations of training and testing, TRADOC, ATC commanders, and school commandants must ensure that training standards are enforced.

TR 350-6, para 3-14, Drill sergeant uniform.
a. The drill sergeant's regular working uniform consists of the campaign/bush hat and battle dress uniform. The Class A uniform with campaign hat, and the Class B uniform with campaign hat, may be worn on appropriate occasions.

b. During periods of training which call for a tactical environment (e.g., tactical road marches, FTXs), unit cadre will be in the same uniform as the IET soldiers. During all other periods of training, the drill sergeant will wear the prescribed drill sergeant uniform.

c. For PFT, the uniform for IET soldiers and cadre will be the Army issue physical fitness uniform (PFU). Installations may use a variety of color-coded road guard vests or reflective equipment to distinguish between IET soldiers and cadre.

TR 350-10, para 2-14.

2-14. Small group leader, senior small group leader and instructor standards. The success of institutional training depends on having experienced SGLs, SSGLs and instructors who are leadership mentors, role models, and teachers. Small group leaders, SSGLs and instructors conduct leadership assessments, counseling, and assist students to identify strengths, weaknesses, and actions to improve performance. They are responsible for student physical conditioning, control, discipline, and administrative requirements; training specified common core tasks in all courses; and training and reinforcing specified branch tasks in branch courses. Minimum SGL, SSGL and instructor training and qualification standards are contained in TRADOC Reg 350-70. Additionally—

a. Commandants or designated representatives—

(1) Will ensure soldiers selected to be SGLs meet the grade, MOS and skill level/assignment experience criteria and physical fitness capabilities of the course they will be assigned to conduct/mentor. SGLs must be of like-MOS (except for PLDC and BNCOC or ANCOC Common Core) and be a graduate of the courses they teach, except as described in paragraph 2-14a(3) below.

(2) For pilot/newly fielded courses, will ensure SGL and instructors complete a train-the-trainer course to meet qualification criteria outlined in the CMP and receive constructive credit as outlined in AR 350-1.

(3) For low-density MOS BNCOC and ANCOC, or when soldier attends the Phase I TASS Common Core at an approved location other than his/her MOS proponent school, commandants may substitute other like-level career progression SGLs in a different MOS when qualified SGLs are not available in the correct MOS. Substitute SGLs must satisfy CMP qualification requirements.

(4) Will provide SGLs, SSGLs and instructors a quarterly written evaluation (except for part-time NCOAs where infrequent class scheduling may only allow evaluations opportunities semi-annually). These evaluations are useful in incentive and recognition programs, as well as for TRADOC-wide competition.

(5) Will maintain file per AR 25-400-2 (File Number: 351b, Instructor information) containing following information—

(a) Documentation of qualification credentials. (Document showing Instructor Training Course and SGI course graduate, meets height/weight standards, and passed last APFT.)

(b) Updated copy of DA Form 2-1 (Personnel Qualification Record, Part II/Enlisted Record Brief) or DA Form 4037 (Officer Record Brief), as appropriate.

(c) Copy of current DA Form 705.

(d) Copy of all written quarterly evaluations for the past 12 months.

Note: See web site www.rmd.belvoir.army.mil/markstit.htm for MARKS file supporting information.

b. Small group leaders, SSGLs and instructors will meet specific grade standards. However, during times when a school is short the required number of by-grade SGLs for a course, commandants may use SGLs who are one grade higher than specified. Soldiers not meeting the minimum skill level/grade standards, or more than one grade higher, will not assume SGL, SSGL or instructor duties without prior written approval of the course proponent commandant/CG or their designated representative in the rank of colonel or higher. The following specific course SGL/instructor criteria apply:

(1) Command and General Staff Officer Course—lieutenant colonel or senior major that is CGSOC, or equivalent, graduate.

(2) Captains Career Course—

(a) Branch-specific phase—major or senior captain.

(b) Staff process training phase—lieutenant colonel.

(3) Officer Basic Course (instructor)—captain (command experience preferred).

(4) Warrant Officer Senior Staff Course—Chief Warrant Officer, CW5.

(5) Warrant Officer Staff Course—Chief Warrant Officer, CW4.

(6) Warrant Officer Advanced Course—Chief Warrant Officer, CW3.

(7) Warrant Officer Basic Course—Chief Warrant Officer, CW2.

(8) Warrant Officer Candidate School—Chief Warrant Officer, CW2.

(9) Sergeants Major Course—sergeant major* with prior assignment experience as a sergeant major.

(10) First Sergeant Course—master sergeant with prior first sergeant/detachment sergeant experience.

(11) Battle Staff Noncommissioned Officer Course—master sergeant* with prior unit battle staff assignment experience.

(12) Advanced Noncommissioned Officer Course—sergeant first class* with prior assignment experience in a Skill Level 4 duty position.

(13) Basic Noncommissioned Officer Course—staff sergeant* with prior assignment experience in a Skill Level 3 duty position.

(14) Primary Leadership Development Course—staff sergeant* with prior assignment experience in a Skill Level 3 duty position.

(15) Senior SGL for PLDC, BNCOC, ANCOC–sergeant first class*.

*See DA Pam 611-21, table 11-1. As an exception, a certified PLDC or BNCOC SGL may continue instructor duties for up to 2 years after promotion to sergeant first class (SFC).

c. Noncommissioned Officer Academy commandants who lack sufficient numbers of the minimum grades required are authorized to utilize NCOs no more than one grade higher than specified to conduct the training. Soldiers not meeting the minimum grade and/or more than one grade higher than required will not assume or be assigned NCOES SGL or instructor duties. This accommodation does not change the grade tables in DA Pam 611-21.

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DA PAM 611-21, Chapter 11.

Chapter 11
Standards of Grade for Specialized Duty Functions
11–1. General

a. This chapter contains standards of grade (SG) tables and guidance for Army-wide grading of the following specialized functions. Proponents with unique grading requirements dictated by span of control, safety, technology, force structure, or other valid considerations, may request approval to grade those positions in the individual MOS tables in chapter 2 of this regulation. Chapter 10 tables take precedence over chapter 3 tables. If specific standards are not provided in the individual tables in chapter 10, the standards in chapter 11 will be applied.

(1) Instructors and advisors (table 11-1).
(2) Training developers and writers (table 11-2).
(3) Drill sergeants (table 11-3).
(4) Military assistance advisory groups (table 11-4).
(5) Technical and tactical board NCOs (table 11-5).
(6) Technical intelligence NCOs (table 11-6).
(7) Maintenance assistance and instruction teams (table 11-7).
(8) Installers (table 11-8).
(9) Senior staff NCOs (table 11-9).
(10) Ranges (table 11-10).
(11) Threat analysis NCOs (table 11-11).
(12) Leadership development/personnel proponent NCOs (table 11-12).
(13) Program systems management NCOs (table 11-13).
(14) Directorate combat development NCOs (table 11-14).
(15) Directorate evaluation standardization NCOs (table 11-15).
(16) Training department (schools) NCOs (table 11-16).
(17) Directorate plans training mobilization NCOs (table 11-17).
(18) Operations, intelligence and training sergeants (table 11-18).
(19) Inspector General (IG) inspection, and IG assistance and investigation NCOs (table 11-19).
(20) Chief training, management, operations and project NCOs (table 11-20).
(21) Technical inspection NCOs (table 11-21).
(22) Operations, observer and controller NCOs (table 11-22).
(23) Operations and contingency plans NCOs (table 11-23).
(24) Inspector General NCO (table 11-24).
(25) Active component/Reserve component (AC/RC) support (table 11-25).
(26) Reserve components USAR/ARNG division (table 11-26).

b. These standards do not authorize positions. They provide the

basis for grading positions. Specific guidance on use of special qualification identifiers (SQI) is contained in chapter 12 of this regulation and AR 600-200.

c. The grading standards from tables 11-1 through 11-23 will be applied to the cumulative positions within the same organizational element, i.e. section,paragraph. In sections or paragraphs with multiple MOS identifiers, i.e 11B, 14D and 54B, the first position will be graded and coded with the predominate MOS of the career management field served or subject matter specialization of the service school or training center course. In the above example, drill sergeant positions in a training company, infantry training center would be graded and classified as SFC 11B4X, SSG 14D3X and SSG 54B3X.

d. Incidental support positions, administrative or technical, will be governed by the grading provisions of the specific MOS contained in chapter 10. These positions will not be coded with SQI "H" , "I" , "X" , or "2" .

e. No action will be taken to revise the SG for an individual MOS solely to accommodate positions governed by the standards contained in this chapter.

f. The grade used in classifying these positions must be consistent with the low-high grade authorized by SG for the MOS in chapter 10.

11–2. Standards of grade for instructors and advisors

a. Instructor and advisor positions identified by SQI "H" will be governed by the following criteria and table 11-1.

b. The positions may be classified in the indicated grade in any MOS. For example, positions classified in these standards as Instructor/writer, or Writer/instructor, 11B3H, may be coded in grade SSG and positions as Instructor/writer, or Writer/instructor, MOS 11C4H, may be graded SFC. Normally, bona fide instructor positions will not be in a rank lower than SSG.

c. The MOS will be appropriate to the CMF served, or to subject matter specialization.

d. All positions requiring full time instructors or writers will be titled Instructor/writer, or Writer/instructor. The principal enlisted supervisor for instructor/writer, or writer/instructor positions in Directorate of Training and Doctrine (DOTD), and School, Training Departments (DOT) will be titled, Chief Instructor and graded

SGM, when authorized. The principal enlisted supervisor for instructor/ writer, or writer/instructor positions in divisions, DOTD and DOT will be titled Chief Instructor/writer or Writer/instructor, and graded MSG, when authorized.

(1) Assistant instructor positions, to include demonstrators, helpers, equipment handlers, and similar positions, will not be identified by special qualifications character “H” and will not be counted as instructor positions in the application of SG for instructors and advisors. A separate grade pattern is provided in table 11-1 for the grading of these assistant instructor positions.

(2) Squad, platoon, and company NCO positions in training companies that provide for command, control, administration, and messing, but do not provide for training of trainees, will not be classified with SQI “H” .

(3) Non commissioned officer primary leadership development course (PLDC) of instruction for small group leader (SGL) positions may be coded in any MOS (CA, CS, CSS) and identified with SQI “H” , or appropriate SQI. The MOS for basic (BNCOC) and advanced (ANCOC) noncommissioned officer course of instruction for SGL will be the same as that of the group they lead and identified with SQI “H” , or appropriate SQI, per AR 600-200.

(4) The MOS for PLDC, BNCOC, ANCOC, and Sergeants Major Course (SMC) Instructor/writer positions will be based on subject matter specialization (CA, CS, CSS) and identified with SQI “H” , or appropriate SQI.

(5) Use of SQI “H” with the Commandant position in a Noncommissioned Officer Academy (NCOA) is not authorized.

11–3. Standards of grade for training developers and writers

a. Training developer and writer positions, identified by SQI “2” in chapter 12, will be governed by the SG in table 11-2. This SG applies only to those training developer and writer positions that require the preparation of doctrine and training literature, lesson plans, analysis and rewriting of doctrine in the development of instructional literature and systems by action officers on a full time basis.

b. The SQI “2” will not be removed or replaced by another SQI while the individual is assigned to training development and writer duties.

c. Positions will be classified in an MOS most closely related to the training activity, career management field served, or subject matter specialization.

11–4. Standards of grade for drill sergeants
a. Drill sergeant positions identified by SQI “X” will be governed by the SG in table 11-3. The drill sergeant program is described in AR 614-200.

b. These positions will be classified in the MOS most closely related to the career management field served, training activity, or subject matter specialization.

11–5. Standards of grade for MSG and SGM in military assistance advisory groups (MAAG)
All MSG and SGM positions in MAAG do not require SQI “H” identification per table 11-1 will be graded using the SG at table 11-4. General assignmentcriteria is contained in AR 614-200.

11–6. Standards of grade for noncommissioned officers serving on technical or tactical boards
a. Principal NCO positions in technical and tactical boards will be governed by the SG at table 11-5.
b. These positions must involve significant participation in technical or tactical functions of boards and must not be limited to administrative or other supporting activities. Positions may be classified in any MOS, provided appropriate grade is contained in the SG for the specific MOS in chapter 10.

11–7. Standards of grade for technical intelligence (analyst) positions
Analyst positions will be governed by the SG in table 11-6. Duty position titles associated with technical intelligence positions will reflect the MOS official title, followed by the suffix “analyst” .

11–8. Standards of grade for maintenance assistance and instruction teams (MAIT)
Positions directly concerned with the discharge of duties in connection with MAIT program activities will be governed by the SG in table 11-7. These positions are not considered instructor positions requiring SQI “H” .

11–9. Standards of grade for installers
Installer positions identified by SQI “I” per chapter 12 will be governed by the SG in table 11-8. This SG applies only to bona fide installer positions, entailing installation of equipment, systems or subsystems on a full-time basis.

11–10. Standards of grade for senior staff NCOs
a. Senior Staff NCO is a “staff action” position designed to

utilize the valuable technical expertise and professionalism of the senior noncommissioned officer in the functional area represented by a particular CMF. Duty performance is primarily oriented to creative writing, preparation and presentation of briefings, participation in meetings and conferences, and coordination of actions with other staff elements. Presence of another SGM position in the same organization will not bar use of a senior staff NCO. However, senior staff NCO positions will not normally be established where the principal NCO in the same or higher organizational element is graded less than SGM. Also, these positions will not be authorized below the sub-MACOM level unless specified in the grading standard (table 11-9) and approved by HQDA.

b. Senior staff NCO positions will be graded SGM as shown in the SG in table 11-9. Positions may be classified in any MOS, provided grade SGM is contained in the MOS SG in chapter 10.

c. Approval authority for these positions is retained by HQDA (DAPE-PR), WASH DC 20310. Requests for establishment and approval will contain the following information:

(1) MTOE/TDA number.

(2) Paragraph and line number, current authorized duty position title, MOS code, and grade.

(3) Proposed MOS code.

(4) Justification for classification as senior staff NCO.

11–11. Standards of grade or range supervision, operations, maintenance and safety NCOs

a. Range positions will be governed by the following criteria and table 11-10.

b. The positions may be classified in any MOS, provided appropriate grade is contained in the SG for the specified MOS in chapter 10.

c . Incidental support positions, electrical / mechanical repairers, service and supply, administrative or technical, will be govered by the grading provisions of the specific MOS contained in chapter 10.

d. This SG applies only to those range positions which require supervision, operations, security, safety and coordination of training center and installation, indoor and outdoor ranges, maneuver and impact areas, and similar training facilities in a garrison or military community (MILCOM) outside CONUS (OCONUS).

11–12. Standards of grade for threat analysis NCOs
a. Threat analysis NCO positions will be governed by the following criteria and table 11-11.

b. The positions may be classified in any MOS, provided appropriate grade is contained in the SG for the specified MOS in chapter 10.

c. Positions will be classified in the career management field or subject matter specialization most closely related to the training activity.

11–13. Standards of grade for leadership development/ personnel proponent NCOs
a. Leadership development and personnel proponent NCO positions will be governed by the following criteria and table 11-12.

b. These positions encompass NCO duties normally associated with total enlisted personnel life-cycle management per AR 600-3.

c. The positions may be classified in any MOS, provided appropriate grade is contained in the SG for the specified MOS in chapter 10.

11–14. Standards of grade for program systems management NCO
a . The program systems management NCO positions will be governed by the SG in table 11-13.

b. These positions encompass NCO duties as program managers in activities involving the conception, research, development and acquisition of materielsystems for the Army, and from requirements formulation through the disposal of obsolete systems for which the school is proponent.

c. Positions will be classified in the MOS most closely related to the school proponent career management field served.

11–15. Standards of grade for directorate combat development (DCD) NCOs
a. The DCD NCO positions will be governed by the SG in table 11-14.

b. These positions encompass duties requiring NCOs to:
(1) Prepare new Tables of Organization and Equipment (TOE) and revise existing TOE within assigned area.

(2) Develop manpower requirements criteria (MARC); qualitative and quantitative personnel requirements information (QQPRI); organizational structure, personnel and equipment requirements in support of structure, and assist other test agencies such as the Operational Test and Evaluation Command (OPTEC).

(3) Plan organization of proponent units and of proponent aspects of other units and organization to include TOE and Manning Equipment List (MEL).

(4) Conduct conceptual basic derivative and doctrinal studies of near, mid and long range timeframe.

(5) Determine requirements and prepare proposals for combat development experimentation and testing, and review results.

c. Positions will be classified in the MOS most closely related to the training activity, career management field served, or subject matter specialization.

11–16. Standards of grade for directorate of evaluation and standardization (DOES) NCOs

a. The DOES NCO positions will be governed by the SG in table 11-15.

b. These positions encompass duties requiring NCOs to evaluate elements engaged in the performance of assigned functions relating to:

(1) Curriculum development.

(2) Systems approach to training (SAT).

(3) Engineering and instructional methodology.

(4) The electives programs, resident and nonresident training, resource requirements and course scheduling.

(5) Preparation of self development tests (SDT) and manuals.

(6) Monitoring student input and training load.

c. Positions will be classified in the MOS most closely related to the training activity, career management field served, or subject matter specialization.

11–17. Standards of grade for training department (schools) NCOs

a. The training department NCO positions will be governed by the SG in table 11-16.

b. These positions encompass NCO duties required for additional support in training departments not governed by table 11-1.

c. Positions will be classified in the MOS most closely related to

the training activity, career management field served, or subject matter specialization.

11–18. Standards of grade for directorate, plans, training and mobilization (DPTM) NCOs

a. The DPTM NCO positions will be governed by the SG in table 11-17.

b. These positions require NCOs to:

(1) Formulate and execute operational, emergency, and mobilization plans.

(2) Maintain and update force status reports.

(3) Receive, consolidate and transmit Army training and evaluation program reports.

(4) Supervise conduct of individual training, which may include basic training (BT), one station unit training (OSUT), and/or advanced individual training (AIT).

(5) Administer and monitor MOS/self/career management qualification testing programs for the installation.

c. These positions will be classified in the MOS most closely related to the training activity, career management field served, or subject matter specialization.

11–19. Standards of grade for operations, intelligence and training sergeants

a . The operations, intelligence and training sergeants will be governed by the SG in table 11-18.

b. These positions require NCOs concerned with the planning, training, control, and supervision of training functions at service schools, integrating centers, CONUSAs, MACOM headquarters, and U.S. Army Garrisons.

c. Positions will be classified in the MOS most closely related to the training activity, career management field served, or subject matter specialization.

11–20. Standards of grade for inspector general (IG) inspection, and IG assistance and investigation NCOs

a. Inspector general inspector, assistance and investigation positions will be governed by the SG in table 11-19.

b. These positions require NCOs as subject matter experts in support of IG functions at service schools, integrating centers, CONUSAS, MACOM headquarters, and U.S. Army Garrisons.

c. Positions will be classified in the MOS most closely related to the training activity, career management field served, or subject matter specialization required by the installation/headquarters IG.

11–21. Standards of grade for chief training, management, operations and project NCOs in commandant's or assistant commandant's office in U.S. Army service schools

a. The principal NCO and operations/project NCO positions in the office commandant or assistant commandant of schools will be governed by the following criteria and table 11-20.

b. The positions may be classified in any MOS, career management field, or subject matter specialization most closely related to the training activity, provided appropriate grade is contained in the SG for the specific MOS in chapter 10.

c. These positions encompass NCO duties normally associated as the chief enlisted advisor on health, welfare, training and management programs of the school; and central operations for schools.
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11–22. Standards of grade for technical inspection NCOs

a. The technical inspection NCO positions will be governed by the SG in table 11-21.

b. In these positions, NCOs are required to implement quality control measures, perform initial and final type check and inspection of designated system items and their assemblies and subassemblies, and supervise inspection and maintenance team.

c. The positions will be classified in any MOS (except for CMF 67, see chapter 10) most closely related to the equipment and materiel requiring quality assurance and controls and grade is contained in the SG for the specified MOS in chapter 10.

11–23. Standards of grade for Combat Training Center's, U.S. Army National Training Center, Joint Readiness Training Center, and Command General Staff and College NCOs

The individual trainers, operations, training support and analysis, and observer and controller NCO positions will be governed by the SG in table 11-22. Special Qualification Identifier "H" , for instructors and advisors will not be used with these positions.

11–24. Standards of grade for operations and contingency plans NCOs

a. The operations and contingency plans NCO positions will be governed by the SG in table 11-23.

b. In an Emergency Operations Center environment, NCOs in these positions are required to execute contingency plans and operations in:

(1) Support of Local and Federal government agencies.
(2) Intra- and inter-command operational programs and policies.
(3) Combat readiness mobilization and depoloyment programs.
(4) Augmentation of Unified and Specified Command operations.

c. The NCOs within the Emergency Operations Center serve as extensions of the DA Command and Control System (DACCS) in MACOMs, Unified and Specified Commands and outside CONUS (OCONUS).

d. The positions may be classified in any MOS, provided appropriate grade is contained in the SG for the specific MOS in chapter 10.

11–25. Standards of grade for (TOE/MTOE) inspector general NCO positions

These positions require NCOs as subject matter experts in support of IG functions in Tables of Organizationand Equipment and Modified Tables of Organization and Equipment (TOE/MTOE) that will be governed by the SG in table 11-24. In TOE/MTOE principal IG NCO requirements will be coded with the predominate or most closely related CMF/MOS to the functional activity associated with the organizational elements in Divisions, and Separate Brigades. Example: in TOE/MTOE, Inspector General NCO, MSG, 11M5O, as principal NCO in IG section of Mechanized Infantry Division, HHC, when principal IG officer position is graded LTC.) In COSCOM TOE/MTOE, the principal IG NCO positions requirements will be coded with the most closely related technical functions that relate to the units mission and needs. Exception: In Corps, Echelons above Corps and Theater Army TOE/MTOE, the principal IG NCO position requirements will be coded MOS 75Z with subsequent IG NCO positions requirements identified with the most closely related technical functions that relate to the units mission and needs.

11–26. Standards of grade for active component (AC) providing support to reserve component (RC)

a. Active component coordinator support positions for RC will be

governed by SG table 11-26.

b. These positions will be classified in the MOS most closely related to the branch/career management field served, training activity, or subject matter specialization.

c. Incidental support positions, i.e., administrative, logistics, military intelligence, will be governed by the grading provisions of the specific MOS contained in chapter 10 and chapter 11 (i.e., MAIT table 11-7).

d. Request for positions to be authorized in grade MSG and above will require HQDA approval and must be submitted to Office of the Deputy Chief of Staff for Personnel, ATTN: DAPE-PRP, 300 Army Pentagon, Washington, DC 20310-0300.

TR 350-18 , Ch 3.
Chapter 3
Administration
Section I
General
3-1. General. This chapter contains general policies and administrative procedures for the operation, administration, and training support of the U.S. Army TASS. The procedures herein are applicable to individual educational training. Exceptions to the operational procedures in this regulation will be forwarded to HQ TRADOC, DCSED, ATTN: ATED, 11 Bernard Road, Fort Monroe, VA 23651-1001.

3-2. Institution SOP. TASS institutions must develop and maintain a unit SOP, which includes, as a minimum, policy and procedures for:
a. Verifying student prerequisites.
b. Ensuring student and staff/faculty compliance with AR 600-9.
c. Test control and accountability procedures.
d. Student in-processing and out-processing.
e. Student disenrollment and appeal process.
f. Preparation and distribution of student guides.
g. Refresher and remedial training.
h. Resourcing training.
i. Safety.
j. Sexual harassment/equal opportunity (EO).
k. Student and instructor records.

3-3. Soldier safety and force protection. Reference TRADOC Regs 351-10, 350-70, 385-2, and Field Manual (FM) 100-14.

3-4. Risk assessment/risk management. Reference TRADOC Regs 351-10 (para 2-18), 350-70, and 385-2 (paras 4-3 and 6-3), and FM 100-14.

3-5. Institutional training. Conduct of institutional training.
a. Prerequisites for each course are published in DA Pams 351-4 and 611-21, course management plan, and ATRRS (http://www.asmr.com/atrrs). Student qualification in prerequisite tasks is the individual's and unit commander's responsibility.

b. Schools will present training as designed and approved by training/TD (task) proponent. This will ensure tasks are trained at the appropriate skill level and to the standards prescribed for each course.

c. Student training and instructors.
(1) School staffs, faculties, and ill supervise and support instructors and students and ensure commitment to training, educating, and developing each student. Ensure facilities are provided to accommodate after hours study requirements for students.
(2) Trained, qualified, and experienced instructors will conduct and supervise student training. Trainer-to-student ratios will be IAW POI/CMP requirements and will be sufficient to ensure student control, safety, and supervision, as well as to facilitate teaching, coaching, mentoring, and developing individual students.
(3) Instructors will provide students with progressive and sequential training, as designed and approved by the training/TD (task) proponent, accurate student performance measurements and tests, and timely feedback.

d. There will be occasions when TASS training battalions are requested to conduct training in courses for which TRADOC or the other proponents have not developed and distributed courseware. Within resource limitations, valid requirements should be supported. The requirement for TASS training battalions to conduct training only with proponent-approved courses remains in effect. Procedures for TASS training battalion development and proponent approval of such courseware are found in TRADOC Reg 350-70, part VI. The situation may arise, where a TASS training battalion is unable to conduct a course under their school code. If the training is essential to unit readiness, it may become necessary for another component to assume the mission. If this occurs, the following guidelines apply:
(1) The TASS battalion and its supporting command (TAG/DIV(IT)) responsible for the conduct of the course must grant permission for another component to conduct the course.
(2) Once approval has been granted, NGB or USARC, as appropriate, will load the course under the school code conducting the course, on a one-time basis.
(3) Although the owning TASS battalion is not conducting the course, it remains responsible to ensure instructors are certified and the course is conducted to standard.

3-6. Reclassification training.
a. Reclassification courses have non-MOS specific (i.e., common core) tasks deleted by the proponent, as soldiers attending these reclassification courses have already completed initial entry training (IET) and do not need to repeat this basic soldiering

training. AC soldiers may attend training at TASS battalions if the battalion is accredited and teaching TATS-C.

(1) Only reclassification courses approved by TRADOC (training/TD (task) proponent commander), AMEDDC&S, or USAJFKSWCS, as appropriate, will be used.

(2) All tasks in the approved POI must be taught. In circumstances that preclude a task being taught , an exception to policy letter must be obtained from the training/TD (task) proponent prior to conduct of training. The TASS training battalion will prepare and distribute a DA Form 1059 (IAW guidance in AR 623-1), DA Form 5286-R, and DA Form 5286-1-R for each student who completes a reclassification course. Copies of these forms for local reproduction are located at the back of AR 351-1 (AR 351-1 will be superseded by AR 350-1) and this regulation. DA Form 5286-1-R will be overprinted to include all POI tasks, and the TASS training battalion will annotate the student's performance (go/no-go/pass/fail/not taught) on each task. A copy of the forms will be provided directly to the student's unit commander and a copy will be retained at the TASS training battalion IAW AR 25-400-2.

b. TASS training battalion reclassification courses may be taught in an inactive duty training (IDT) mode, an AT/active duty for training (ADT) mode, self-paced distance learning, or a combination thereof, as specified in the POI.

c. Except for AMEDDC&S, successful completion of a TASS reclassification course qualifies an individual for award of the MOS/AOC. All phases of multi-phase courses must be completed prior to awarding a MOS. Students enrolled in MOS/AOC courses must be qualified for MOS/AOC award (except for pending clearances) IAW the ATRRS screen, prior to attending.

d. For AMEDDC&S courses, the AHS diploma awarded upon successful completion of the course certifies the mandatory formal training, required by DA Pam 611-21, has been completed and is the basis for award of the MOS.

3-7. Instructor qualification/certification. Instructors are certified only by the proponent commandant, IAW TRADOC Reg 350-70, and proponent specific requirements contained in appropriate course management plans. Proponent school will ensure all instructor requirements can be accomplished in a TATS training year. Proponent will provide certification documentation.

3-8. Instructor grade and experience requirements. DA Pam 611-21, TRADOC Reg 351-10, AR 614-200, and appropriate CMP provide guidance for instructor grade and experience requirements.

3-9. Instructional products and training aids requisitioning.

a. Instructional products will be furnished by ATSC or Reimer Digital Library (RDL). The AC, ARNG and USAR will document resource requirements and the organizations providing resources in the ATRRS. Resource data will be shown by school and course by the unit identification code (UIC). The resource requirements will be for the execution

year. Any changes to fiscal year (FY) school missions that occur as a result of TRAP actions must be reflected in the appropriate ATRRS resource display screens.

b. TASS training battalions are supported with instructional products from three distinct sources:

(1) The Visual Information/Training Support Center (VI/TSC) System. Training aids, devices, and visual information products and equipment, although often required in the conduct of courses, are not included in instructor or student sets, and are not provided by ATSC or RDL. These items must be requested, on a loan basis, from the appropriate VI/TSC. All TASS training battalions will establish and maintain accounts with the VI/TSC serving their geographic location. Courseware products will be closely examined for required training aids, devices, simulations and equipment, and requests for such items will be made in sufficient time to support scheduled classes. Note that VI/TSC loans are made on a first-come, first-served basis. Adequate prior planning and coordination are essential to ensure responsive support. TASS training battalions should maintain copies of the following publications in their training support libraries:

- DA Pam 350-9
- DA Pam 350-100
- TRADOC Pam 350-9

(2) The Department of the Army administrative publications system. Some courses still require DA publications as instructor resources and/or as student texts. Such DA publications are not included in course instructor/student sets and must be requisitioned separately. All TASS training battalions will establish accounts with the U.S. Army Publications Distribution Center, St. Louis. Procedures for establishing and using DA publications accounts are found in AR 25-30 and DA Pam 25-33. Courseware products will be closely examined for required training aids, devices, simulations and equipment, and requests for such items will be made in sufficient time to support scheduled classes.

(3) Courseware reproduction/distribution system.

(a) Reproduction and distribution of TATS courseware/RC3 are requirements-based, driven by the ARPRINT and TRAP requirements. Courseware is reproduced and distributed by ATSC based on user requests received during established requisitioning windows for IDT and AT as follows:

- 1 February - AT requisitions due to ATSC for PLDC, BNCOC/ANCOC Common Leader, Phase I, BNCOC/ANCOC Phase II, First Sergeants Course (FSC), and NBC Defense.
- 1 November - AT requisitions due to Directorate of Non-Resident Studies (DNRS)/CGSC for CGSOC and CCC. CGSC will forward to ATSC.
- 1 June - IDT requisitions due to ATSC for BNCOC/ANCOC Common Leader Phase, Phase I, and NBC Defense.
- 1 April - IDT requisitions due to DNRS/CGSC for CGSOC and CCC. CGSC will forward to ATSC.

- For TAITC, SGITC, and SATBC requests through: Commander USATSC, ATTN: DLC-S, Fort Eustis, VA 23604-5166.

(b) All courseware user requirements are submitted using TRADOC Form 350-18-R-E. All requisitions are forwarded through appropriate channels to ATSC (TMSD-T). Sample TRADOC Form 350-18-R-E is at figure 3-1. Completion instructions are at appendix E.

(c) All courseware requisitions must be received by ATSC prior to the close of the appropriate requisition window. At the close of each window, ATSC consolidates the requirements, by course, into Basis-of-Issue Plans (BOIP). The BOIP determine how many courseware sets will be distributed.

(d) Submit requisitions to Commander, U.S. Army Training Support Center, ATTN: ATIC-TMSD-T, Bldg 1542, Fort Eustis, VA 23604-5168. DSN 927-5066/5072, Comm (757) 878-5066/5072.

(e) Training/TD (task) proponents may choose to reproduce, distribute, and manage TATS courses. The courseware can be multimedia and may involve distribution over video teletraining (VTT) or the Internet. Proponents will distribute courseware in response to the BOIP, promulgated by ATSC. ATSC and responsible training/TD (task) proponents distribute courseware so the products will be on hand prior to the training start date.

(f) Courseware requisitions received by ATSC outside the specified windows are called "out-of-cycle" requests. ATSC and training/TD (task) proponents maintain residual stockage of courseware against such contingencies, but when these supplies are exhausted, an additional printing of courseware materials may not be available.

c. Requisitions for course materials should be initiated for a particular phase or module, per the TATS course structure and the CMP implementation guidance, i.e., for a normal two-phased course, ADT phase/module should not be ordered at the same time as the IDT phase. Each phase should be ordered separately using TRADOC Form 350-18-R-E. See sample in figure 3-1.

d. TAG/DIV(IT) will ensure:

(1) All instructional products needed to conduct required classes are identified and requisitioned in sufficient time to ensure receipt prior to class start dates.

(2) Accountability for all products received is established and maintained.

(3) Cross-leveling of all available products is accomplished to the maximum practicable extent before requisitions for products are forwarded.

(4) All instructional products are identified, retained, conserved, cross-leveled, and shared.

e. Specific courseware responsibilities:

(1) TIE will monitor with ATSC and TASS regiments/brigades to resolve problems/issues concerning courseware requisitioning and delivery.

(2) Regional TASS regiments/brigades will --

(a) Review and approve/disapprove all justifications for issue of additional instructor sets, recoverable items in excess of authorized quantities, and all out-of-cycle

requisitions and forward to ATSC or DNRS, as appropriate, and furnish a copy to the TIE.

(b) Direct inventory/accountability procedures which enable visibility and redistribution of all available courseware.

(3) TASS training battalions will --

(a) Maintain a training support master file of current courseware they are chartered to teach under TASS alignment.

(b) Provide courseware inventories as directed by TASS regiments/brigades.

(c) Establish test control procedure for Test Control Officer (TCO)/NCO that supports ARs 380-5 and 611-6.

- Provide training/TD (task) proponents, ATSC, with orders or memorandums appointing the TCO/NCO and a DA Form 1687 authorizing the TCO to request test material.
- Test material must be requisitioned on a separate TRADOC Form 350-18-R-E.
- Test will only be issued for courses requested and only one copy of each test version will be issued.
- Failure to maintain an account with training/TD (task) proponent or ATSC for test material will result in nonsupport of testing products.
- For TATS course testing material, establish test control account with proponent school.

f. Account establishment/maintenance.

(1) All TASS school codes must establish and maintain signature card accounts (DA Form 1687) with ATSC (ATTN: ATIC-TMSD-T).

(2) DA Form 1687 will be updated and resubmitted by 1 October of each year. A new form will be immediately submitted when personnel, address, or other changes occur which affect the DA Form 1687. ATSC must be notified immediately of changes to POC, telephone numbers, and addresses in order to ensure timely and efficient shipment of courseware.

g. Requisitioning procedures.

(1) TRADOC Form 350-18-R-E will be used to request courseware for both IDT and AT phases. A copy is provided at the back of this regulation for local reproduction.

(2) TASS regional regiment/brigade must forward out-of-cycle requisitions to ATSC, when required, 60 days prior to scheduled class start date.

(3) Requisitions for course materials should be initiated for only one phase/module at a time (i.e., for a normal two-phased course, the ADT phase should not be ordered at the same time as the IDT phase). Requirements for the second phase/module may be significantly different from initial enrollment in the first phase. For those few courses that are not packaged by phase/module, the entire course must be ordered at one time. In those cases, it is extremely important that course materials be conserved and brought to the ADT portion of the course, as a second requisition for the same class will not be honored.

(4) Instructor sets, in their entirety, are accountable/recoverable items, as are selected student materials so identified. If a course has been taught by TASS school code in the preceding 3 years, requisitions for additional instructor sets/materials and recoverable student materials must be justified on the basis of increased student load and/or additional instructors. Justification for additional or replacement recoverable materials must be forwarded with the TRADOC Form 350-18-R-E.

(5) In the event of canceled or rescheduled courses, increases or decreases in enrollment, or training site changes, ATSC should be notified by the most expeditious means available so that shipments in progress can be adjusted accordingly. Telephonic changes should be followed up with hard copy.

(a) When a change in training (delivery) location occurs and the change is not reported in sufficient time to redirect courseware shipment(s), TASS battalion commander is responsible for receiving the shipment(s) and transporting to the proper training location.

(b) If a course/requirement is canceled, but the notification is not made in sufficient time to stop shipment of courseware, TASS battalion commander will report any excess to TASS regiment/brigade.

(c) If materials requirements increase after the initial request has been processed, TASS school code must inform ATSC at least 30 days prior to the training date.

h. Inventory and cross-leveling procedures.

(1) School codes will inventory all courseware quarterly and copy furnish TASS regional regiments/brigades and TIE.

(2) All course materials not required by TASS school code for the conduct of current year training will be identified to regional TASS regiments/brigades for cross-leveling to meet other current year requirements.

(3) Regional TASS regiments/brigades will supervise the cross-leveling of courseware within their regions and will report to ATSC any excess materials for cross-leveling among other regions.

3-10. Reproduction and distribution. The TRADOC goal is to maximize technology; therefore, courseware will be provided in digital format (e.g., Compact Disk-Read Only Memory (CD-ROM), floppy disc, Internet file transfer protocol (FTP), etc.).

3-11. Test control procedures. Student Performance Measurement/Test control procedures are delineated in TRADOC Reg 350-70, chap VI-7. Test control procedures for classified material is found in AR 380-5. Testing policy is reiterated for language testing in AR 611-6.

3-12. Attendance register.

a. Purpose: To track attendance for pay and education/training.

b. ATRRS class roster and attendance record (TRADOC Form 270-R, located at the end of this regulation) will be prepared and maintained for each training site. Under no circumstances will students be permitted to complete/sign out before the end of the day for which the register is maintained.

c. Distribution:
(1) Original to TASS battalion headquarters.
(2) Copy for instructor's records.
(3) Copy in the visitor folder in each classroom.
(4) Copy for individual's unit of assignment.

d. For annual training, the ATRRS class roster will be used in lieu of TRADOC Form 270-R.

3-13. Maintenance of training support records. Training support records will be maintained at each school code site, as required by the proponent school.

3-14. Use of Title XI personnel in support of TASS.
a. Overview. Title XI is a congressionally-mandated program to provide AC support to the RC for training and education. Congress is funding Title XI assets for the specific purpose of increasing the readiness of the RC and to enhance the overall effectiveness of the Army.

b. Title XI in TRADOC. Within TRADOC, the DCSED has responsibility for TASS and for administrative support of TRADOC's Title XI personnel who support TASS. TRADOC's Title XI personnel will be utilized to assist in training development, accreditation and standardization, and instructor certification within TASS in support of RC training. The use and responsibilities of Title XI personnel will be in concert with congressional language and intent.

c. General guidance. General guidance on the use and responsibilities of Title XI soldiers in TASS remains as follows:
(1) Title XI soldiers assigned to TASS provide support to The Army Individual Training Missions and work on individual training products that are Army-specific.
(2) Administrator duties, such as day-to-day unit administration and supply, and instructor duties do not meet the intent of congressional guidance. All day-to-day activities within the TIE are in support of TASS and meet TRADOC policy.
(3) In addition to meeting all proponent instructor certification requirements (TAITC/SGITC/proponent specific requirements), Title XI personnel assigned to proponent schools will complete the TRADOC Systems Approach to Training Basic Course (SATBC) taught at the proponent school.

d. Specific guidance. Specific guidance, based on the four possible duty locations (DCSED, TIE, training/TD (task) proponent, and TASS training battalion) remains as follows:
(1) DCSED Title XI responsibilities:
(a) Address quality assurance and accreditation issues within the capability of the DCSED and forward other issues to proponent authority.
(b) Coordinate issue resolution with other commands.
(c) Utilize ATRRS as a management tool to facilitate effective training and resolve training problems.

(d) Serve as a liaison between TRADOC and the TIE.

(e) Provide program and budget input for Title XI training programs, and Army training quality assurance programs.

(2) TASS Integration Element (TIE) will incorporate the following responsibilities/duties in the job descriptions of their Title XI soldiers:

(a) Coordinate TRADOC programs within the region(s).

(b) Coordinate the accreditation of school battalions within the region.

(c) Coordinate and provide feedback to the appropriate training/TD (task) proponent on the efficiency and effectiveness of training courseware.

(d) Maintain a database of issues, waiver requests, TO, ISE, accreditation, and DCSED trend reports of regional interests.

(e) Assist with the preparation of the budget for travel within the region.

(f) Assist with the conduct of regional workshops in cooperation with TRADOC training/TD (task) proponents.

(g) Assist with the conduct of periodic announced and unannounced training observation visits to training site classes in session.

(h) Utilize ATRRS as a management tool to facilitate effective training and resolve training problems within the region.

e. TASS training battalion will assign the following responsibilities/duties to their Title XI soldiers.

(1) Serve as primary full-time school battalion liaison with TRADOC training/TD (task) proponent.

(2) Serve as primary full-time school battalion liaison with TIE.

(3) Assist training/TD (task) proponent, as required, in accreditation of TRADOC courses.

(4) Serve as member of institutional self-evaluation team.

(5) Conduct instructor certification program in conjunction with functionally aligned training/TD (task) proponent.

(6) Serve as a subject matter expert (SME) and provide professional development for classroom instructors.

(7) Critique classroom/field instruction. Provide feedback to the chain-of-command, and assist in corrective actions.

(8) Assist with the coordination of training products with TASS training battalion to ensure availability and distribution.

(9) Provide feedback on efficiency and effectiveness of training courseware for forwarding to the training/TD (task) proponent.

f. Training/TD (task) proponent will assign the following responsibilities/duties to their Title XI soldiers:

(1) Evaluator functions.

(a) Establish and maintain a working relationship with functionally aligned regional school battalions.

(b) Coordinate and conduct accreditation of school battalions IAW paragraph 3-44 below.

(c) Serve as SME.

(d) Gather and analyze course accreditation information and provide to HQ TRADOC when requested, or when training/TD (task) proponent determines a need to inform TRADOC.

(e) Coordinate with training developers for corrections; follow up to ensure course corrections are made.

(f) Assist with ATRRS interface.

(g) Receive and make recommendations to proposed policy and doctrinal changes.

(h) Identify problem areas utilizing checklist at appendix B; take part in making a plan to resolve, suggest, assist in development of procedures; develop a training strategy; teach unit members and evaluate implementation.

(2) Training developer functions.

(a) Assist with the sustainment of RC3 (refer to TRADOC Reg 350-70, chaps VI-6-4 and VI-8).

(b) Assist in the transition of courseware to TATS courseware.

(c) Serve as SME.

(d) Coordinate training development issues with school battalions.

(e) Provide responses to questions and requests from TASS training battalions.

(f) Receive and make recommendations to proposed policy and doctrinal changes.

(g) Receive and review request for waivers of QA requirements.

g. Assumptions.

(1) The RC chain-of-command is responsible for training RC soldiers. Nothing outlined in this section of this regulation will serve to alter that responsibility. Allocation of AC personnel to support TASS training battalions in any capacity in no way modifies the authority or responsibility of the RC chain-of-command.

(2) Associated training/TD (task) proponents are responsible for training assistance and evaluation of the associated TASS training battalions.

(3) The program will be only as effective as the flow of appropriate communication between the participants, especially at the senior leadership levels.

(4) TASS training battalion personnel can improve mission performance if provided cooperative advice and assistance of qualified AC personnel.

(5) Support of the program is available using tri-component funding methodology used by HQDA.

(6) Program funding and allocation of personnel are required by law, and therefore subject to budget and personnel distribution plan decrements only in competition with other statutory programs.

(7) FORSCOM is the HQDA executive agent for the Title XI program. TRADOC is applying FORSCOM guidance to its affiliated program.

h. Policies and procedures. In all cases, except as noted below or where cross-component issues take precedence, normal policies and procedures which apply to personnel assigned to the same duty locations as Title XI soldiers, will also apply to Title XI personnel.

(1) Confidentiality, loyalty, and mutual respect among the various components are the professional foundation of the program. AC dedicated support personnel will work alongside TASS training battalion personnel but will not duplicate the functions of the full-time personnel that are already a part of the unit nor assume command responsibilities.

(2) AC personnel assigned to the Army school program are ‘doers,’ workers, organizers, coaches, and planners.

(3) Limitations.

(a) In order to focus efforts on the assistance mission, TASS Title XI personnel will not be permanently assigned primary duties in supported units which involve command, formal evaluations, inspections or administrative responsibilities (i.e. property book accountability, reports of survey, certification of funds for other than internal use). TASS Title XI personnel do not have document releasing authority except as permitted by the RC chain-of-command.

(b) The presence of TASS Title XI personnel does not change command relationships or staffing procedures in the support-to-supported relationship. Command and staff communications which routinely occur between commands must continue to be executed IAW accepted staffing practices.

(c) Program personnel will not be reassigned into the parent command without prior approval from this headquarters.

(d) TASS Title XI personnel may not be assigned TASS training battalion duties or functions which duplicate those currently included in staffing guides or Manpower Workload Requirements (Schedule X) for the full-time unit staff.

i. Unit evaluations. Consistent with FMs 25-100/101, TASS Title XI personnel may assist commanders in assessing the TASS training battalion.

j. State or territory emergencies. ARNG soldiers who are called into state emergencies are empowered and protected by state laws to use specific authorities and perform unique duties which are covered by state Tort Claims and emergency law enforcement statutes, as well as Declarations of Emergency. The duties vary widely between states, but usually include powers of arrest, use of deadly force, and authority to direct dispersal. Therefore the following guidelines apply:

(1) TASS Title XI personnel assigned in support of NG TASS training battalions that are activated by the state for humanitarian emergencies should participate. These operations exercise the chain-of-command, preventive maintenance, checks, and services, training, and other functions, and usually provide an excellent opportunity to hone skills necessary for wartime mission.

(2) TASS Title XI personnel assigned to support NG units are prohibited by state and federal law (18 USC 1385) from enforcing state laws in State Declared law enforcement emergencies. AC personnel must avoid being in a situation wherein an impartial observer may construe the role of the AC soldier as enforcing state laws.

(3) In state emergency situations, TASS Title XI personnel may act in a myriad of supporting roles performing functions which are consistent with the TASS mission of contributing to the improvement of the training battalion, and which indirectly contribute to the overall restoration and maintenance of law and order. The functions may include

operation of communications, situation reports, maintenance, administrative transportation, and operations planning. Mission activities which risk exposure to situations which may enmesh AC soldiers, such as reconnaissance or patrolling, must be avoided. Under no circumstances should AC soldiers be issued weapons in a state emergency.

k. TASS Title XI personnel assigned to ARNG or AR units activated in response to any Federal Declaration of Emergency are covered by the same legal protections as supported unit members. They are required to perform in support of the unit's missions as it would for any other federal mission.

l. Assignments.

(1) Personnel will be assigned in a manner that facilitates movement of household goods and families to ensure all AC soldiers transactions are properly processed.

(2) Tour length for the Army school program officers will be two years CONUS, and three years for OCONUS tours. Enlisted assignments will normally be three years.

m. Special educational requirements.

(1) Soldier must be instructor qualified or a graduate of TAITC.

(2) All Title XI soldiers utilized to conduct training observation for consideration by accreditation teams, must receive training in the accreditation process. Title XI soldiers assigned with duty at the training/TD (task) proponent must receive training identified in TRADOC Reg 350-70, part II.

(3) Orientation of newly assigned personnel.

(a) The gaining TIE for each member being assigned within its area of responsibility will provide an orientation which includes, as a minimum, mission, responsibilities and complexities unique to the RC environment in which the soldier will operate.

(b) The TASS training battalion will conduct a similar orientation which includes, as a minimum, mission, responsibilities, and particulars about the community in which the soldier and his/her family will live.

(c) The training proponent will provide training for the battalion Title XI soldier on proponent-specific accreditation issues.

(d) Personnel assigned to evaluator duties must receive training and meet the requirements delineated in TRADOC Reg 350-70, prior to commencement of duties.

n. Title XI program evaluation and feedback.

(1) Measure of effectiveness. Each TIE will conduct an annual assessment of the effectiveness of the program within their area of responsibility, noting improvements in the training of supported units. The assessment will include overall trends on accreditation issues and quality of life trends, to include results of housing surveys. The assessment is due to DCSED by 1 December, with the report as of 30 September.

(2) The Department of the Army is required to report program effectiveness to Congress. The requirement applies to other MACOM allocated program personnel. The reports should be sent to DAMO-TR. Information copies will be furnished to TRADOC, DCSED (ATTN: ATED).

o. Coordinating instructions.

(1) Authorizations for TASS Title XI spaces are documented in The Army Authorization and Documentation System, within the TRADOC table of distribution and allowances (TDA). Modifications require the same change documents (DA Form 2028) and timelines associated with any other modification table of organization and equipment (MTOE)/TDA changes. All requests for modifications should be submitted to DCSED, ATTN: ATED.

(2) Administrative workload requirements are the responsibility of the supporting commanders. Titles VII and XI program authorization documents do not contain provision for internal administrative personnel. However, workload data required to support the internal program overhead may be legitimately documented as part of the supporting headquarters TDA.

3-15. Regional Training Councils (RTC).

a. TRADOC, through the TIE, establishes RTC for the purpose of coordinating institutional training and leader development activities within TASS regional boundaries.

b. The purpose of the RTC is to integrate requirements and capabilities to conduct individual institutional training to standard in the most efficient and effective manner. The focus of the RTC is to identify and resolve individual training challenges (e.g., instructor and equipment shortfalls).

c. RTC should meet at least twice each year, sufficiently in advance of the IDT and AT periods in order to enhance training efficiency, effectiveness, and training opportunities for soldiers.

d. Request AC school representation. It is critical that the RTC include representation from all ARNG and USAR TASS battalions, state/territory plans, operations and training officers (POTO), Major United States Army Reserve Command (MUSARC) and CONUSA DCST. Representation from regional training brigades is highly desirable. The RTC must be capable of making immediate decisions based on full knowledge of requirements and resources available.

e. Within 30 days following each meeting, the TIE will prepare an after-action report (AAR) (RCS exempt IAW AR 335-15, paragraph 5-2a(4)), highlighting training solutions and unresolved issues. Copies of the AAR will be provided to NGB (NGB-ART-I), OCAR (DAAR-OP-IT), USARC (AFRC-OPT-I), USASOC (AOOP-TRI), FORSCOM (AFOP-TRO), ARNG state headquarters within the region, MUSARC within the region, TASS training battalions within the region, and the appropriate proponent schools, with information copy to other TIE and HQ TRADOC (ATED).

3-16. The Regional and National Training Coordination Conference (TCC). The TIE in Regions A through G will actively participate with the ARNG and USAR to ensure the success of the SMDR. In preparation for the SMDR, the Reserve Community will conduct both Regional and National TCCs. Input agencies will verify requirements and

work with schools to eliminate constraints. Proponent schools will participate in the Regional and National TCC process to assist in identifying where training can best be accomplished within TASS.

3-17. SMDR process.

a. The SMDR is an annual individual training requirement determination and confirmation process chaired by HQDA (Deputy Chief of Staff for Operations and Plans (DCSOPS) and DCSPER). The SMDR will be conducted on a by-course basis. Courses taught at the proponent schools will be presented first followed by that proponent's courses taught in TASS Regions A through G, and OCONUS and RC3 courses. The Army training requirements for a given fiscal year are compared against the training capability of the concerned TASS battalion/training center/institution. The SMDR process will cover all directed education/training to include residence and distance learning.

(1) Proponents should be prepared to recommend where, within the TASS institutions, additional training can be conducted if it cannot be accommodated in the active component resident school. Army must fully utilize the entire existing TASS training base capacity for constrained courses. If active component schools within the TASS are unable to accommodate projected load, they must recommend alternative solutions. Part of the analysis should include the reserve institutions as a means to train the active component school untrainable load. Proponents will identify the course to be trained. The TASS institution will determine the number of iterations.

(2) The ATRRS summary sheet is the primary working document. It records the training requirements and variable course data required to develop the ARPRINT.

(3) Resources for courses that are transferred from one school to another will be moved effectively within the execution year.

b. Responsibilities. The TASS battalions/training centers/institutions will --

(1) Identify and resolve major training capability discrepancies prior to the SMDR. TASS RC institutions will resolve major training capability discrepancies with their Division (IT)/State Headquarters, TIE, and USARC/NGB.

(2) Provide school representatives throughout the TCC process who represent and speak for their commander concerning bottom-line training capability and resource requirements.

(3) Coordinate with the proponent school and identify constraints to training and excess capacity prior to the SMDR. Attempt to resolve any issues from the TCC with the proponent school, NGB, and USARC and identify, through the proponent school, any unresolved issues to HQ TRADOC, TOMA for elevation to CoC/GOIPR.

(4) Resolve all issues pertaining to training requirements; new or revised courses; course length changes; changes to maximum, optimum and minimum class sizes; instructor contact hours (ICH), instructor student ratio (ISR), and training hours.

(5) Identify all issues pertaining to training requirements; new or revised courses; course length changes; changes to maximum, optimum and minimum class sizes; ICH, ISR, and training hours to the proponent school prior to the SMDR so changes can be made in ATRRS.

(6) Provide course annual maximum capacity for update of C9 (fiscal-year-specific course administrative data) display. TASS RC/institutions provide same data at the RTCC. All courses will have school estimated maximum annual capacity. This information is required to permit ATRRS the ability to provide automated reports on those courses which are constrained and have CE, CF, or CZ entry, or those courses which are not actually constrained but are approaching or have a specific maximum capacity within the resources available. All other courses should reflect the upper limit the school can accommodate.

(7) Provide responses to all unresolved SMDR issues to proponent. Proponent will forward to HQ TRADOC, ATOM-P. Responses will provide solutions or actions initiated leading to the issue solution and will be prepared in fact sheet format. Each fact sheet will address a separate course (issue) and will be in sufficient detail to pro" document to justify that issue.

3-18. Army Training Requirements and Resources System (ATRRS).
a. Introduction. ATRRS is a DA personnel input to the Training Management Information System. It is an on-line system that integrates manpower requirements for individual training with the process by which the training base is resourced and training programs executed. ATRRS is a critical automation system tool that directly supports the SMDR process. The system generates the ARPRINT which is the mission and resourcing document for the Army's training base. ATRRS provides the tool that permits personnel, resource and training managers (representing Army staff, field agencies, and training MACOM), to size the training base, schedule and reserve training seats to maintain personnel readiness.

b. AR 350-10 is the governing regulation for ATRRS.

c. The help desk numbers for ATRRS are DSN 225-2353/2060, or (703) 695-2353/2060.

3-19. Resources.
a. TASS school codes are responsible for obtaining all resources associated with conducting the course IAW TASS cross component resourcing MOU. ISA/MOU will be established to facilitate borrowing equipment or facilities.

b. When equipment to support training is insufficient for all students or teams to perform to standard, the following considerations apply:

(1) If equipment nonavailability degrades training to the point that award of the MOS cannot be justified, training will not be conducted.

(2) An exception to policy/waiver must be approved by the training/TD (task) proponent before the start of scheduled training.

c. Whenever a TASS training battalion instructor performs IDT at a class location other than the normal duty station (NDS), and outside normal commuting distance (as defined in Joint Federal Travel Regulations), the instructor is authorized travel/per diem from either the NDS or residence, depending on departure point when directed to perform

duty at a site other than the NDS. The NDS for TASS training battalion instructors is defined as the primary duty location where the instructor spends the majority of his/her time teaching. If the instructor does not spend the majority of his/her time at any one location within a fiscal year, then the TASS training battalion commander must designate the NDS either as the TASS training battalion headquarters or a teaching site. This is true whether the TASS training battalion commander has designated the school headquarters or a teaching site as a NDS. If the NDS is the teaching site, then the instructor would be entitled to travel/per diem to the school headquarters. However, if the TASS training battalion commander has designated the NDS to be the school headquarters, the instructor is not entitled to reimbursement for travel to the TASS training battalion headquarters.

3-20. Funding.

a. School training missions are developed during the SMDR IAW AR 350-10. The chiefs of each component are represented at the SMDR. Schools see their future training missions prior to the SMDR and have an opportunity to comment on their resource constraints. No school is given a mission unless its component agrees to provide the resources to execute the mission. Schools will not nonconduct classes because of resource constraints in the execution year, unless all components with quotas agree to the cancellation, or it is determined by HQDA that the necessary resources cannot be made available. Schools receive no reimbursement for students, regardless of the service or component of the student. Each Army component is responsible for providing sufficient total resources to train the number of students programmed to attend its schools as identified by ARPRINT. Resources, for the purpose of this regulation, are defined as:

(1) Manpower (staff and faculty).
(2) Facilities (instructional, billeting, and messing).
(3) Equipment, to include operating tempo (OPTEMPO).
(4) Supplies: classes I, II, III, III(P), IV, VIII, and IX.

b. Class II, personal clothing (uniform) requirements, will be determined by the school and shown in the ATRRS. The school will not issue personal clothing. The students' unit of assignment will ensure they report for training with the required individual clothing and equipment.

c. Class V. HQ TRADOC is the one-source contact to HQDA (DAMO-TRO) for all POI-driven class V requirements in support of the TASS. Class V requirements will be--

(1) Managed by TIE. The TIE in each region will act as a TRADOC installation to consolidate and report Class V requirements and obtain annual authorizations for the TASS training battalions in its area.

(2) Based upon the approved course and guidance in TRADOC Reg 350-8 and AR 5-13.

d. Personnel.

(1) Each component must provide personnel support to the other components, within the limits of their resources and ISA, to accomplish the TASS training mission.

(2) TRADOC will host a meeting in coordination with NGB and USARC, not later than 120 days prior to the beginning of the training year, to determine manpower shortfalls and negotiate necessary personnel support agreements among the components.

(3) Reimbursement among the military pay appropriations (National Guard Pay Appropriations (NGPA) and Reserve Pay Appropriations (RPA)), for services provided by one component in support of another component, may occur under certain circumstances. However, sufficient Funded Reimbursement Authority (FRA) must first be obtained through the normal budgetary process. In order to ensure this authority is available, local support agreements must be negotiated and reported up the chain-of-command for aggregation and incorporation into budget submissions. NGB and HQ USARC will issue instructions to subordinate activities on procedures to report locally negotiated support agreements. NGB, OCAR and HQ USARC will review and reconcile the amounts that drive the requirement for FRA and will incorporate into budget submissions. NGB and USARC must approve all MOA to ensure there are sufficient funds available in the FRA in the year of execution. Once approved, the funds are locked-in for that support. NGB and USARC then provides an open allotment fund site for the orders. In addition, NGB, OCAR and HQ USARC will negotiate summary level agreement concerning overall reimbursement between NGPA and RPA. In the year of execution, a Military Interdepartmental Purchase Requests (MIPR) will be exchanged between NGB and HQ USARC to effect the reimbursement. Lower echelons will not be required to process reimbursements, but will receive adjustments to their direct funding based on support agreements. Any questions concerning reimbursement among the military pay appropriations should be presented in resource management channels.

(4) Operations and Maintenance, Army, Operations and Maintenance, Army Reserve, and Operations and Maintenance, National Guard funds may be used to pay the travel and per diem costs of borrowed instructors or other personnel, regardless of component.

e. Equipment support.

(1) Short-term loan of equipment is governed by AR 700-131.

(2) Long-term loan of equipment is governed by DoD Directive 1225.6.

(3) The borrower will pay all costs associated with the use of borrowed equipment. Costs include preparation for issue and turn-in; transportation to and from the lender; OPTEMPO; and repairs (to include parts and manpower). Borrowed equipment will be returned to the lender in the same condition as when borrowed. The borrower will transfer funds to the lender to make repairs, if the borrower does not have repair capability.

(4) Borrowed equipment will pass a technical inspection (TI) at the organizational level, prior to shipment, both to and from the borrower. The condition of borrowed and returned equipment must normally meet -10/20 standards. However, TASS organizations may agree to terms and conditions different from -10/20 standards, when it is beneficial for a school to use equipment for training purposes that does not meet the standards. A joint TI will be conducted with representatives from both the borrowing and lending units present. If a joint TI is not possible, the borrower and lender will sign a memorandum of acceptance before the equipment is shipped.

f. Facilities.

(1) The component with the school mission is responsible for providing the facilities necessary to conduct training, without reimbursement.

(2) When a school wishes to conduct a course at facilities owned by another component, it will reimburse, via DD Form 448 (MIPR), the supporting installation or facility.

(3) The components are not responsible for providing facilities and services, without reimbursement, for "walk-on" students in excess of the maximum class size shown in ATRRS. "Walk-on" students in excess of the maximum class size may be transferred to another class or returned to their units of assignment, if another class is not available. The components may agree to provide the resources necessary to accommodate "walk-on" students.

g. Billeting. Installation commanders will make every effort to billet students on post. Installation commanders will not require students not in a temporary duty (TDY) status to maintain a course related bachelor officer quarters/bachelor enlisted quarters for which the student must pay.

(1) Courses currently conducted with billeting provided at no cost to the students, will continue as such.

(2) Billeting will be provided to students from all components on an equal basis, regardless of training status (e.g. AT, ADT, TDY or TDY and return).

(3) If government quarters are not provided, the school will provide students a non-availability statement so indicating, and the student will be reimbursed for his costs through normal per diem claim procedures.

(4) If a school uses contract facilities, such as dormitories on a civilian education campus, and incurs a cost for such use, the school may charge students a billeting fee. Students from all components will be charged equally. Students will be reimbursed through normal per diem claim procedures. If a school chooses not to charge students, the school is responsible for payment of the billeting costs.

h. Messing.

(1) Schools will provide government meals to students where possible. The operating costs of providing meals will be borne by the school.

(2) Personnel entitled to meals at government expense shall be furnished such meals at no cost to the individual, regardless of the individual's component. In no case will a student from one component be required to pay a different amount than students from another component in the same or like training status.

(3) The component providing meals at government expense to personnel of the other components may obtain reimbursement. Reimbursement is accomplished at DA level.

(4) The school will provide students who are charged for meals a non-availability statement indicating such, and the student will be reimbursed through normal per diem claim procedures. In no case will students from one Army component be issued non-availability statements for the same training course in which government messing is available to students from another component.

Section II
Student Administration
3-21. Selection. AR 351-1 (until superseded by AR 350-1), NG Reg 600-200, and AR 140-158 address the selection process and criteria for resident education and training courses. DA Pam 351-4 and ATRRS address requirements and prerequisites for courses.

3-22. Orders. No student will travel or report for institutional training (IDT, ADT, or AT) without proper orders. For IDT courses, the ATRRS Automated Training Application System (AATAS) application will serve as the order. Commanders will ensure soldiers receive orders a minimum of 30 days prior to report date. Soldiers who are upgraded from wait status to reservation status on ATRRS will receive their orders at the earliest possible time.

3-23. Student orientation. All TASS training commanders will post their student orientation information under their respective school codes to the school header (SH) screen in ATRRS. Information will be current at all times. Units and students may access the student orientation material on the ATRRS homepage at: http://www.asmr.com/atrrscc/courses.asp. If ATRRS access is not available, student information will be mailed to the student's unit no later than (NLT) 45 days prior to course start date. Additional copies will be available for students who did not receive their orientation information. Information will include:

a. Course scope and prerequisites.

b. Billeting, mess, financial and support information.

c. Clothing, equipment, documents, other items required for course attendance and a listing of prohibited items.

d. Post and local community information including appropriate telephone numbers.

3-24. Physical fitness/weight control.
a. Soldiers attending professional development courses (OES, WOES, OCS, and NCOES) and NCO functional courses must meet body composition standards and physical fitness standards IAW TRADOC Reg 351-10.

b. Soldiers attending MOS reclassification courses must meet body composition standards of AR 600-9. The APFT is not a requirement to attend or graduate from MOS reclass courses. DA Form 705 is not required. Training institutions will verify all student's height and weight, IAW AR 600-9, upon arrival. Students found not in compliance with AR 600-9, paragraph 3-31, will not be enrolled in the course.

c. Soldiers with a P3 (one or more medical condition which requires significant limitation of military duty) or P4 (one or more medical condition of such severity as to drastically

limit military duty) profile must provide their military medical review board (MMRB) results along with their profile.

3-25. Enrollment and attachment.
a. The soldier's unit commander will ensure all soldiers, including walk-ons, enrolled in institutional training meet course prerequisites. Soldiers reporting for training must have in their possession a completed and properly signed pre-execution checklist. The purpose of the pre-execution checklist is to assist the unit in preparing soldiers for school attendance, while providing one single document, with appropriate attachments, for the training institutions. This checklist will be completed by appropriate unit personnel and verified and signed by the unit commander. Soldiers reporting for training without the checklist, signed by the soldier and unit commander, will be given 72 hours from the report date to provide the checklist with appropriate attachments. Soldiers attending IDT courses will be given until Saturday of the second multiple unit training assembly (MUTA)-4. After this time, soldiers will be returned to their unit. The pre-execution checklist is a pre-enrollment requirement for all TASS courses/institutions except OCS, CCC, CGSOC, and the resident sergeant major (SGM) course. The pre-execution checklist will be used to verify routine prerequisites such as line scores, physical capacity or stamina, upper extremities, lower extremities, hearing, ears, psychiatric (PULHES), and DA Form 1059. The unit commander can further certify the completion of prerequisite testing/evaluation (i.e., typing test). Documentary evidence of security clearance, physical profile and other non-routine prerequisites are required in addition to the pre-execution checklist. The unit commander's signature on the pre-execution checklist will suffice as certification that the soldier meets routine course prerequisites (as stated above) IAW all requirements of the course as listed in DA Pam 351-4, and the ATRRS prerequisite screen. The pre execution checklist is found at appendix H.

b. When a commander releases a student to attend TASS battalion classes, the student will be required to attend all scheduled training. Commanders at all levels will ensure that students meet all course prerequisites and are not removed from training for other duties.

c. Students will be attached, for training only, to the TASS training battalion during IDT/AT. Enrollment for TPU/man-day soldiers is accomplished by the submission of the AATAS through command channels.

d. The commanders will forward AATAS enrollment applications to the appropriate quota manager for soldiers who desire to attend TASS training battalion classes during IDT/AT.

e. Army officers serving in an active status, to include ADT for 179 days or more, may attend TASS training battalion phases of CGSOC in a TDY status.
(1) AC officers should apply for attendance using DA Form 4187 through normal AC channels to the appropriate quota issuing authority (NGB or USARC). The quota will be issued to the approving command responsible for orders. The installation assigned

logistical support for the area is responsible for funding. Funds are allocated from P81 (8127861) account.

(2) USAR AGR officers will submit requests for quotas on DA Form 4187 to the USARC (AFRC-OPT-I). The USARC will forward requests to Commander, AR-PERSCOM, ATTN: ARPC-OPM-PD, 9700 Page Avenue, St. Louis, MO 63132-5200, which will issue quotas and provide fund cites to the MUSARC for publication of orders.

f. All IRR/IMA soldiers' requests for ADT phases of TASS training battalion courses and TPU officers' requests for AT/ADT phases of CCC and CGSOC will be forwarded to Commander, AR-PERSCOM, ATTN: ARPC-OPM-PD, 9700 Page Blvd., St. Louis, MO 63132-5200.

g. For IRR officers enrolling in CGSOC, TASS CGSOC battalions will assist applicant to initiate a DA Form 4651-R, IAW AR 140-10. After the form is completed by the officer, the TASS CGSOC Battalion will sign and mail the form to Commander, AR-PERSCOM: ATTN: ARPC-OPM-O, 9700 Page Blvd, St. Louis, MO 63132-5200.

h. Correspondence course students who are academically eligible and meet course prerequisites may apply through appropriate channels to attend TASS AT/ADT phases of CGSOC.

3-26. Procedures for transfer between schools. Students meeting enrollment prerequisites may transfer from one TASS training battalion to another. They will be accepted at any time to complete the remaining phase(s)/module(s) of a course, provided they submit evidence of satisfactory participation for the phase(s)/module(s) completed. Losing TASS training battalion commander will forward the student's AATAS application to the gaining TASS training battalion commander. The losing TASS training battalion will retain a copy of enrollment application for a period of 3 years IAW AR 25-400-2. Academic Evaluation Report (AER) will be forwarded by losing battalion to gaining battalion.

3-27. Academic retest.

a. TASS battalion commanders will ensure students are tested and retested IAW the student evaluation plan for the course being presented.

b. Soldiers passing retest will be awarded the minimum passing score for grade averaging and class standing purposes. However, retest scores will also be recorded in students’ records to establish final proficiency level attained.

3-28. Student academic records.

a. The TASS battalion commander is responsible for ensuring all student input/output data is posted to ATRRS within 10 working days of course start date and completion date.

b. The TASS battalion will maintain individual records for each student for 12 months, containing the following documents:

(1) The enrollment application (AATAS or DA Form 4187 for IDT).
(2) The attachment order, if prepared.
(3) A copy of the pre-execution checklist with appropriate signatures.
(4) All student leadership evaluations.
(5) All test scores.
(6) All counselings, to include initial, performance, leadership, end of course evaluations, and individual developmental action plans.
(7) Copy of course completion, DA Form 1059.
(8) Any other correspondence referencing the soldier, i.e., drop packet.
(9) DA Form 705 (maintained for professional development courses, and selected functional courses).
(10) DA Form 3349 with MMRB results (if applicable).

c. After the 12-month record retention period, the DA Form 1059 will be removed from the individual records and kept on file, IAW AR 25-400-2. Supporting documentation is destroyed.

d. The TASS battalion may prepare a certificate of training for each student (except AMEDDC&S/OCS courses) upon successful completion of all phase requirements. The certificate of training will include the student's name, course title and phase, and completion date.

e. Records for disenrolled students must be maintained for two years IAW AR 25-400-2/TRADOC Reg 351-10.

3-29. Student evaluations.
a. Instructors/facilitators will measure student performance IAW TRADOC Reg 350-70, chap VI-7, and TD (task) proponent-provided student evaluation plans and tests.
(1) Instructors will conduct developmental counseling IAW FM 22-100.
(2) Designated instructors will consolidate and analyze each student's performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commander. Evaluators will provide students documented feedback at completion of each evaluation or test. Course manager/senior instructors or other school personnel knowledgeable of course requirements will counsel students on consequences for failure on evaluations, IAW course management and student evaluation plans. Evaluators will use results to determine ratings for AER and course academic records and reports.

3-30. Academic evaluation report. The TASS battalions (except OCS) will prepare a DA Form 1059 for each student upon successful completion or disenrollment from the course or phase, IAW AR 623-1.

3-31. Student recognition.
a. Commanders/commandants will present a training proponent diploma (except CCC and CGSOC) to students who meet course completion criteria established by the student evaluation plan for a TATS course.

b. Certificates and diplomas.

(1) Certificates/diplomas containing complete course title and course identification number will be issued to all students on successful completion of courses listed in ATRRS.

(2) Certificates/diplomas will include the student's full name, grade, course or phase, and beginning and completion dates of the course.

(3) School commandants may issue locally produced certificates to students who successfully complete shorter courses. They may also issue certificates for constructive credit when proficiency has been verified by prescribed evaluations.

(4) Course completion will be entered in appropriate personnel records IAW AR 600-8-104 and NGR 600-8-104.

3-32. Notice of academic, denied enrollment or withdrawal. The TASS battalion commander/commandant will provide written notice to the first general officer in the student's chain-of-command, company commander, and to the order issuing headquarters, if appropriate, for students who:

a. Are denied enrollment due to height/weight, or have profile guidance given in DA message 081650Z Mar 95, subject: APFT and Height/Weight Requirements; and DA message 292030Z Jan 99.

b. Fail to provide adequate documentation of prerequisites to attend the course.

c. Withdraw from the course for any reason.

d. Fail to meet course standards, either academically, physically, or through misconduct.

3-33. Student dismissal. Procedures for student dismissal are outlined in AR 351-1 (AR 351-1 will be superseded by AR 350-1) and AR 623-1.

3-34. Recycle policy.

a. Academic recycles. Commandants may, after coordination with PERSCOM, AR-PERSCOM, NGB, OCAR, USARC and/or individual's unit, recycle a student once to a follow-on class, if available. Academic recycle should be limited to extraordinary circumstances when a student shows significant potential and Army needs dictate.

b. Medical or emergency recycles. Commandants may recycle students who (through illness, injury, emergency leave, or other unavoidable training absence) miss a significant portion of training after coordination with PERSCOM, ARPERSCOM, NGB, OCAR, USARC and/or individual's unit.

c. For professional development courses see TRADOC Reg 351-10.

3-35. Credit for course completion requirements. Requirements for successful completion:

a. Meet training completion requirements specified in the Student Evaluation Plan/CMP.

b. For CGSOC and CCC. Receive a satisfactory grade on all TASS training battalion tests, as specified in the Student Evaluation Plan. Also see guidance published by Commandant, CGSC.

c. For AMEDDC&S courses, the TASS training battalion must report modules successfully completed to AHS (MCCS-HSN) for preparation of course diplomas.

3-36. Constructive/equivalent/equal credit.
a. Personnel requiring constructive or equivalent credit to meet enrollment requirements in TASS training battalion courses will submit requests through command channels and the commander of the proponent service school for the course the soldier desires to enter to HQDA. USAR requests should be addressed to HQDA, Office of the Chief, Army Reserve, ATTN: DAAR-OP-IT, 2400 Army Pentagon, Washington, DC 20310-2400. ARNG requests should be addressed to Chief, National Guard Bureau, ATTN: NGB-ART-I, 111 South George Mason Drive, Arlington, VA 22204-1382. Requests should be submitted at least 90 days prior to class start date and will include justification/rationale, supporting documentation, and recommendations for approval or disapproval by the appropriate commanders and training/TD (task) proponent commandants.

b. Soldiers receive the same credit for successful completion of training conducted at a TASS training battalion or at training proponent when the conditions in (1), (2), and (3) below are met. Completion documentation information/data made on a graduate's records will not differentiate between modes of course completion. The following conditions must be in place to ensure standards of training:

(1) Individual education/training is conducted in the training proponent or proponent accredited TASS training battalion.

(2) Instructors are certified by the proponent to teach their course.

(3) Use TATS courseware.

Section III
TASS Training Course

3-37. Introduction. To accomplish quality individual education/training to standard for soldiers, each TASS training battalion must adhere to the standards and requirements of the training/TD (task) proponent for each course. The following paragraphs outline proponency for courses taught by TASS battalions and references governing conduct of training in those courses.

3-38. NCOES courses. NCOES course requirements, instructor qualifications, student prerequisites, and completion standards are found on ATRRS, in course CMP, and in course POI, reference TRADOC Reg 351-10, chapter 5. Requirements for the NCOA training environment are addressed in AR 351-1 (AR 351-1 will be superseded by AR 350-1) and TRADOC Reg 351-10.

3-39. OES courses.
a. CGSOC, OBC, officer advanced course (OAC), and CCC. The U.S. Army Command and General Staff College is proponent for CGSOC and CCC. Most course requirements, instructor qualifications, student prerequisites and completion standards are found in ATRRS.

b. All officers are required to attend resident OBC training.

3-40. WOES courses.
a. Warrant Officer Candidate School, Warrant Officer Staff Course and Warrant Officer Senior Staff Course proponent is the Warrant Officer Career Center, Fort Rucker, AL. Course requirements, instructor qualifications, student prerequisites and completion standards are found in ATRRS.

b. Warrant Officer Basic Course and Warrant Officer Advance Course proponents are the Military Occupation Specialty Schools. Course requirements, instructor qualifications, student prerequisites and completion standards are found in ATRRS.

3-41. Functional training. Functional courses can be trained by the TASS training battalion with approval by the training proponent.

3-42. Reclassification course proponents. Appropriate training/TD (task) proponent, course requirements, instructor qualification/certification, student prerequisites, and course completion requirements for reclassification courses are found in appropriate CMP (see TRADOC Reg 350-6).

Section IV
TASS Accreditation

3-43. Overview. This regulation provides specific policy and guidance for the conduct of accreditation of TASS institutions. Accreditation is a functional area of TRADOC Evaluation and Quality Assurance Program. Evaluation and Quality Assurance Program policy is defined in TRADOC Reg 350-70, chapter III-1, to include broad, general accreditation policy and guidance.

3-44. Accreditation. Accreditation is the recognition afforded an educational institution when it has met accepted standards applied by an accepted professional accreditation agency. Accreditation is the process that measures consistency, compliance, standardization, and resourcing for implementation of training at TASS schools, as well as TASS battalions, and the formal authority to conduct (or continue to conduct) training. Specific accreditation policy and guidance are contained throughout this section. For evaluation program policy, to include general accreditation policy, see TRADOC Reg 350-70.

a. The CG, TRADOC is the Army's Executive Agent for TASS and the accreditation authority for all schools teaching TRADOC courses. The CG, MEDCOM, and CG, USASOC, are the accreditation authorities for their respective courses. The HQ TRADOC, DCSED provides accreditation policy and delegates the responsibility to accredit TASS schools to the appropriate proponent.

(1) Accreditation is the formal authority to conduct (or continue to conduct) training. Conduct of training is the most important function of the institution. Therefore, institutions should not receive a probation or non-accredit based solely on their lack of training support unless it has a direct impact on the conduct of training, safety, health and welfare issues, any compromise of course examinations, discipline and fair treatment of soldiers or the careers of soldiers.

(2) Accreditation certifies an institution's administration, operations, and logistical support are adequate to support training to course standards. It certifies all training follows the correct training methodology and lessons sequence, and certifies resources are IAW course requirements. It also certifies, with the assistance of proponent subject matter experts (SMEs), the institution is conducting phase/modules of training IAW the appropriate training/TD (task) proponent's guidance.

(3) If institutions cannot provide quality training based on the proponent course documentation (CMP, POI, SEP) and regulations due to the higher headquarters' inability to provide adequate resources and support, the course or institution can receive a non-accredit due to higher headquarters' issues (HHI). The higher headquarters will be required to correct the identified problem in the manner and time frame outlined in subparagraph "k" before the institution can receive an accreditation reinstatement.

b. The minimum essential requirement is accreditation of the proponent school and each TASS training battalion. Training institutions will be accredited every 3 years during a single training year unless the functionally aligned proponent commandant determines a need for more frequent accreditation.

c. There are two types of accreditation: institution and course. Proponents accredit TASS institutions. Some branch-specific proponents (officer education/leadership) also accredit courses. Functionally aligned TASS training battalions will undergo institution accreditation. Multi-functional school brigades will undergo course accreditation.

(1) Institution accreditation certifies an institution's training support and conduct of training are adequate to train to course standards. Institution accreditation includes evaluation of all training being conducted to ensure training methodology, sequencing, and resources are IAW course requirements.

(2) Course accreditation certifies that instruction is conducted IAW proponent guidance and that students graduating from the course are trained to the same standard as students graduating from the same course taught at the proponent service school. Only a SME designated by the respective proponent service school is authorized to evaluate and recommend accreditation of a course. Additionally, a course cannot be accredited unless the institution is accredited.

d. Assistance and accreditation authority and responsibilities.

(1) Commander, TRADOC, delegates accreditation and assistance authority to proponent school commandants for the TASS training battalions with which they are functionally aligned.

(2) HQ TRADOC, Deputy Chief of Staff for Education (DCSED) --

(a) Orchestrates quality assurance (QA) in TASS and arbitrates QA issues between USARC, NGB, and the AC, to include proponent schools.

(b) Will assist TRADOC proponent schools which have been delegated specific accreditation authority.

(c) Resolves "higher HQ issues" identified during assistance visits or self evaluations and forwarded by training/TD (task) proponent as required.

(3) TASS Integration Elements (TIEs) --

(a) Address unresolved issues to the appropriate authority for consideration; track issues for resolution.

(b) Consolidate unresolved "higher HQ issues" and forward list to HQ TRADOC, DCSED.

(c) Consolidate unresolved issues and forward list to HQ TRADOC, DCSED.

(d) Conduct periodic announced and unannounced TO visits to training site classes in session.

(e) Execute TRADOC QA program within the region and arbitrate QA issues between TASS training battalions and functionally aligned TRADOC proponent school.

(f) Monitor QA within the region, to include corrective action and coordination/conduct of evaluation visits, to ensure a continuing program of interrelated parts; anticipate and take preemptive actions to "de-conflict" potential QA problems within the region.

(g) Ensure all TIE personnel are trained and qualified as QA evaluators. TIE personnel may serve as composite team members for accreditation evaluations of TASS training battalions in other regions.

(h) Create and maintain a database of issues of regional interest extracted from ISE reports; HQ TRADOC, DCSED trend reports; waiver requests; and accreditation reports.

(i) Collect and review TO reports, ISE reports, accreditation reports, and HQ TRADOC, DCSED trend reports to determine trends of regional significance. TIE makes appropriate recommendations to HQ TRADOC, DCSED; TAG; and USAR Training Divisions.

(j) Review all requests for waivers of QA requirements; endorse as appropriate, and forward a copy of request and endorsement to HQ TRADOC, DCSED.

(k) Disseminate results of QA visits to appropriate commands.

(l) Budget for and fund QA travel. Initiate and process travel orders for QA visits and training of evaluators.

(4) Commanders/commandants/training proponents and other designated proponents –

(a) Establish and maintain a working relationship with functionally aligned regional TASS training battalions.

(b) Conduct or coordinate accreditation of proponent school.

(c) Coordinate and conduct accreditations of TASS training battalions as required/coordinated between proponent school and TASS training battalions.

Proponent school Directorate of Evaluation and Standardization (DOES) or equivalent function evaluate all TASS training battalions within a school brigade for accreditation during the same fiscal year.

(d) Provide TASS training battalions assistance as requested in the self evaluation.

(e) Determine the number of persons required to conduct assistance visits based on estimated workload. A tri-component team is not required for assistance visits.

(f) Forward to HQ, TRADOC through the appropriate TIE, a summary report of unresolved HHI identified in the TASS training battalion self evaluation and during the assistance visit. For each issue, the report will specify exactly what the problem is, what is causing the problem, impact on training or soldier welfare, actions taken to resolve the problem, and results of those actions.

(g) Maintain accreditation standards within proponent schools IAW checklists in appendix B.

(h) Fund all visits (a proponent school responsibility).

(i) Accredit as specified below:

- **Proponents** evaluate and accredit TASS institutions IAW the checklist provided in appendix B.
- **USASMA** accredits all TASS NCOAs. *Note:* OCONUS TASS multifunctional brigades/regiments and all TASS NCO academies are functionally aligned with USASMA for accreditation. USASMA assembles a composite evaluation team of SMEs who can evaluate courses taught at these training sites at the optimum time, reducing training distraction caused by multiple accreditation visits. Teams will consist of CA, combat support (CS), combat service support (CSS), and others as appropriate. Each team will appoint a team chief and appropriate SMEs. Those sites/courses outside the optimum window will be scheduled for accreditation directly with the appropriate proponent school. A copy of all assistance/accreditation reports will be provided to USASMA.
- **U.S. Army Training Center and Fort Jackson** accredits all Drill Sergeant School Battalions.
- **U.S. Army Infantry Center and School** accredits Air Assault and OCS courses.

(j) Coordinate assistance visits directly between the multi-functional brigade and the proponent schools.

(k) Forward to HQ TRADOC, DCSED completed accreditation reports, to include summary, checklists, and notes to checklists.

(l) Resolve all disputes concerning accreditation evaluations and reports. The decision of the proponent commandant is final.

(m) Determine their own tri-component team requirements.

(5) Commanders, TASS training battalions –

(a) May request assistance visits if they agree to fund the cost of the visit.

(b) Prepare for assistance visits by completing a self evaluation based on the accreditation checklist (found at app B) and the results of any command inspections or training evaluations conducted by their higher headquarters.

Note: The self evaluation will identify specific problems for which proponent assistance is requested and problems which can only be resolved by higher headquarters' action. The latter must be specific about who and what the problem is, impact on training or soldier welfare, and actions the school has taken to resolve the problem. School battalion provides the self evaluation to the aligned proponent NLT 30 days before the scheduled assistance visit. This allows the proponent time to plan for and prepare requested assistance as well as opportunity to discuss HHI with appropriate higher headquarters' staffs.

(c) Prepare and maintain a mission essential task list (METL) IAW FM 25-100. The purpose of the METL is to provide a foundation against which the institution evaluates itself. The METL and the associated ISE provide the TASS training battalion with vehicles to bring attention to training challenges in a non-threatening environment. The focus of the process is to assure high quality, relevant training courses. When a TASS training battalion surfaces challenges, it ensures that those issues are brought to the attention of the training chain of command and the training/TD (task) proponent.

(d) Annually prepare an ISE. Purpose of the ISE is to maintain the institution's focus on quality and to establish the Army quality environment of encouraging everyone to contribute to the organization's success.

(e) Appoint a team of staff members (including Title XI AC soldiers) and instructors to evaluate the institution in comparison to the METL and accreditation standards. The ISE team --

- Meets annually to discuss findings and suggestions. Meeting format is an AAR of the previous year and projection of the future.
- Identifies challenges which preclude high quality instruction or ideas/insights which should be analyzed for implementation at all TASS training battalions.
- Prepares a written report of recommendations with appropriate references and explanatory paragraphs and forwards list to school battalion commander.

(f) Address issues as appropriate and forward unresolved issues to school brigade commander for record.

(6) Commanders, TASS training brigades consolidate school battalion reports and forward them, with comment, through DIV(IT)s or TAG to the TIE.

e. Accreditation evaluation team. All accreditation evaluations should be conducted by tri-component teams of Active Army, ARNG, and AR soldiers as determined by the proponent. Tri-component teams ---

(1) Are determined by proponents.

(2) Can share perspective of uniqueness of operations in one or another component.

(3) Are formed from proponent-attached Title XI and RC soldiers.

(4) Will include a SME for each Conduct of Training course evaluated.

f. Accreditation evaluator qualifications. Evaluators are the eyes and ears of the accrediting authority; accrediting authority wherever they evaluate training in Army schools worldwide. Accordingly, proponent service school commandants will ensure

their evaluators are a credit to their command in their bearing, competence, professionalism and commitment to excellence in training. Proponent service school commandants verify and certify the qualifications of accreditation evaluators from that training/TD (task) proponent. New accreditation evaluators will be required to perform evaluation duties under the close supervision of a fully qualified and experienced evaluator, until deemed by the DOES (or equivalent functional element) to be fully qualified to represent the proponent and perform evaluation duties without supervision. Specific requirements are as follows:

(1) The accreditation team chief must meet all evaluator criteria and be --

(a) Thoroughly familiar with regulations governing training support and conduct of training in TASS schools.

(b) Able to draw together all the findings and recommendations of accreditation team evaluators into an Accreditation Summary Report which is suitable for general officer review.

(c) Able to resolve any differences which may arise among evaluators or between evaluators and the staff of the school being evaluated.

(d) Able to assist in the resolution of discrepancies in training to standard.

(2) The accreditation team evaluator must be --

(a) Thoroughly familiar with the regulations governing training support and conduct of training in TASS schools.

(b) Familiar with the format of POIs, CMPs, lesson plans, and TSP in order to effectively use these materials in evaluating instruction.

(c) Imbued with the idea that their mission is to insist on standards being met and to assist schools in meeting those standards. In this sense, they are leaders and instructors.

(d) A graduate of an Instructor Training Course (ITC) and, if the course under evaluation is taught in the small group method of instruction, must have completed a SGI course.

(3) The SME evaluating conduct of training must --

(a) Be a graduate of the course being evaluated.

(b) Hold the CMF of the course being evaluated.

(c) Be a graduate of an ITC and, if the course under evaluation is taught in the small group method of instruction, must have completed a SGI course.

(d) Be familiar with the format of POI, CMP, lesson plans, and TSP and be able to effectively use these materials in evaluating instruction using Part II (Conduct of Training) of the Accreditation Checklist and any proponent-specific checklists.

g. Conduct of accreditation evaluation requirements. As a minimum, TASS regions (AC, RC schools) will be accredited every 3 in a single training year unless the functional proponent commandant determines a need for more frequent accreditation. At least 60 days prior to each scheduled accreditation evaluation visit, the team chief will send a message or memorandum to all concerned parties. Addressees include:

- The Commander of the TASS school to be evaluated
- Director of Training or functional equivalent of proponent school to be accredited
- NGB and State TAG (for ARNG school battalions)

- FORSCOM, USARC, and DIV(IT)s (for USAR school battalions in CONUS)
- OCONUS MACOM (as appropriate)
- TRADOC (DCSED)
- TIEs
- Proponents tasked to provide SMEs

The message/memorandum will specify the dates of the scheduled visit (this schedule should have already been agreed to in prior informal coordination between the evaluation team and the commander of the institution to be evaluated), and request ARNG and/or USAR representation. (***Note:*** Make final telephonic coordination with the TASS training battalion at least 1 week before the visit to confirm training schedules and class locations).

h. TASS training battalions will be evaluated for accreditation in a single training year at both IDT and AT/ADT, as applicable, IAW plans in tables 3-1 through 3-4:

Table 3-1

Year 1 (1997, 2000, 2003, etc)

REGION	CA	CS	CSS	HS	PROF DEV
A	ALL BNs	ALL BNs	N/A	N/A	N/A
B	N/A	N/A	ALL BNs	ALL BNs	N/A
C	N/A	N/A	N/A	N/A	ALL BNs
D	ALL BNs	ALL BNs	N/A	N/A	N/A
E	N/A	N/A	ALL BNs	ALL BNs	N/A
F	N/A	N/A	N/A	N/A	ALL BNs
G	N/A	N/A	ALL BNs	ALL BNs	N/A
USARPAC	N/A	N/A	N/A	N/A	CGSC BNs
USAREUR	N/A	N/A	N/A	N/A	N/A

Table 3-2

Year 2 (1998, 2001, 2004)

REGION	CA	CS	CSS	HS	PROF DEV
A	N/A	N/A	N/A	N/A	ALL BNs
B	ALL BNs	ALL BNs	N/A	N/A	N/A
C	N/A	N/A	ALL BNs	ALL BNs	N/A
D	N/A	N/A	N/A	N/A	ALL BNs
E	ALL BNs	ALL BNs	N/A	N/A	N/A
F	N/A	N/A	ALL BNs	ALL BNs	N/A
G	N/A	N/A	N/A	N/A	ALL BNs
USARPAC	N/A	N/A	N/A	N/A	N/A
USAREUR	N/A	N/A	N/A	N/A	N/A

Table 3-3

Year 3 (1999, 2002, 2005)

REGION	CA	CS	CSS	HS	PROF DEV
A	N/A	N/A	ALL BNs	ALL BNs	N/A
B	N/A	N/A	N/A	N/A	ALL BNs
C	ALL BNs	ALL BNs	N/A	N/A	N/A
D	N/A	N/A	ALL BNs	ALL BNs	N/A
E	N/A	N/A	N/A	N/A	ALL BNs
F	ALL BNs	ALL BNs	N/A	N/A	N/A
G	ALL BNs	ALL BNs	N/A	N/A	N/A
USARPAC	N/A	N/A	N/A	N/A	N/A
USAREUR	N/A	N/A	N/A	N/A	CGSC BNs

Table 3-4

Leadership

REGION	98	99	00	01	02	03
A			Accredit		N/A	Accredit
B		Accredit			Accredit	
C		Accredit			Accredit	
D		Accredit			Accredit	
E	Accredit			Accredit		
F	Accredit			Accredit		
G			Accredit			Accredit
USARPAC	N/A			Accredit		
USAREURC	N/A		Accredit			**Note:** High Technical/Regional Training Site-Maintenance (HT/RTS-M), Tobyhanna will be accredited as part of CS schedule in Region B. AC schools will be accredited as part of their TASS region.

i. The following rules apply to evaluating the Conduct of Training for accreditation:

(1) When instruction at all of a training institution's IDT locations cannot be evaluated due to personnel and/or fiscal constraints, the proponent will evaluate a statistically significant sample (which will be not less than 1/3 of the school battalion's IDT sites).

(2) At least eighty percent of evaluated training sites must receive a first time "GO" to receive a training battalion accreditation. For failure to receive a first time "GO", see guidelines in paragraphs j and k, below. Training courses found deficient on a second

visit, if required, will receive a non-accredit and remaining classes will be non-conducted in ATRRS. The process of non-conducting classes should be coordinated with the appropriate agency, TRADOC, NGB, or USARC. The remainder of the training battalion will receive an accreditation.

(3) All courses in session at a training site will be observed/evaluated.

(4) At least one course must be observed/evaluated to accredit an institution.

(5) At least one Annual Training will be evaluated during the year of accreditation.

(6) A training site's course or a training battalion's course that does not meet accreditation standards may be non-accredited and a training site or training battalion may still receive an accredit based on the status of its remaining courses. Only the subject matter expert may recommend a course to receive a non-accredit.

j. Accreditation standards are as follows:

(1) The team chief recommends accreditation ratings based on---

(a) Input from the school battalion (ISE).

(b) Input from the TIE (Training Observation reports).

(c) Findings and recommendations of evaluators.

(d) The severity of the deficiencies and how they affect the Conduct of Training.

(e) The severity of the deficiencies and the effects they have on the soldiers' welfare, health, safety, and careers.

(2) In both major categories of the accreditation checklist (Training Support and Conduct of Training), there are items identified as "critical." The team chief will consider results of critical items more heavily than non-critical items in making an accreditation recommendation. The accreditation ratings below are determined by the following standards:

(a) Accredit. Accreditation of the school is authority to teach and verifies a TASS training battalion meets standards as established in applicable references and regulations. Once accredited, the institution agrees to abide by the standards of their accrediting organization and to regulate themselves by taking some responsibility for their own improvement.

(b) Probation. Probation may be used in two sets of circumstances:

- **Probation Level I** is an accreditation with a request for a follow-up report on specific issues to be submitted by a specific date. This level indicates the institution has a significant problem or shortfall but the training/TD (task) proponent commandant believes corrections can reasonably be implemented within 60 days or as determined by the proponent.
    - If one major category of the accreditation checklist receives an unsatisfactory rating, the team chief should strongly consider a recommendation to place an institution on probation.
    - When the Training/TD (Task) Proponent commandant probates accreditation, it is probated pending receipt of a satisfactory report of corrective actions from the school battalion commander.
    - This report is due to the accrediting authority within the prescribed time of the accrediting authority’s official notification that accreditation is being probated.

    - If corrective action is not or cannot be completed within the prescribed time, the training site/school battalion becomes non-accredited.
- **Probation Level II** is a suspension of the accreditation status with a request for a follow-up report on specific issues, followed by a special visit within six months for full-time institutions or during the next AT period, not to exceed one year. Probation level II indicates a TASS training battalion, RTI, or AC school has significant deficiencies or shortfalls and should not be teaching Army courses or a particular course. The team chief will consider this level of probation when one or more critical areas on any one checklist are determined to be a "NO-GO" or three or more non-critical areas are a "NO-GO." The team chief will also determine if the cause for the probation rating is based on HHI. An institution's accreditation is continued –
    - while it complies with the proponent school's request for information, additional reports, special visits, or other action.
    - during an institution's appeal to DCSED of proponent school accreditation actions.

(c) Non-Accredit. If a school's accreditation is probated and the school fails to meet accreditation standards during the follow-up evaluation, the school's authority to teach TRADOC-approved proponent courses will be withdrawn. Soldiers currently attending and those in-processing to attend training may complete training.

k. School and accrediting authority actions following an accreditation, probation, and non-accreditation:

(1) Accreditation:

(a) Accrediting authority will issue a certificate of accreditation for those schools meeting accreditation standards.

(b) Schools may receive an accreditation and still have "NO GOs" on their accreditation checklists. They may also have deficiencies the accreditation team observed but were listed as "GOs" on the checklist because the school fixed the problems during the inspection. It is the school's responsibility to address these issues and insure the "NO GO" and corrected deficiencies do not recur in subsequent inspections. If the same deficiencies are found in the next inspection, they will be considered recurrent deficiencies. This is a critical area on the accreditation checklist.

(2) Probation:

(a) Accrediting authority will notify the school by memorandum of its accreditation being probated. At that time it will become official that the school, if accredited previously, will have its accreditation rescinded.

(b) Accrediting authority will establish a suspense date for the school to provide a reply by endorsement (RBE) to the accrediting authority of corrective actions.

(c) Upon receipt of a probated accreditation memorandum, schools will reply by endorsement to the accrediting authority, in the time specified, with the following:

- Corrective actions taken by the school to prevent the recurrence of deficiencies for those items listed as "NO GOs" on the accreditation checklists.

- Corrective actions taken by the school to ensure those checklist items where deficiencies were observed, but the school fixed during the accreditation, do not recur.

(d) If the accrediting authority, upon receipt of the RBE, is satisfied with the results of corrective actions, issue an accreditation certificate to the school.

(3) Non-Accreditation:

(a) The accreditation authority will notify the school by memorandum of non-accreditation. At that time, it will become official that the school, if accredited previously, will have its accreditation rescinded.

(b) The accreditation authority will schedule a follow-up evaluation at a time determined by the proponent after the school's receipt of the non-accreditation report. The accrediting authority will mail the memorandum via certified mail and contact the school by telephone to make preparations for a follow-up visit.

(c) The school will provide to the accreditation authority, 15 days prior to the follow-up visit, a RBE providing---

- Corrective actions taken by the school to correct the deficiencies as "NO GOs" on the accreditation checklists.
- Corrective actions taken by the school to ensure those checklist items, where deficiencies were observed but which the school fixed during the accreditation, do not recur.

(d) The accreditation authority will conduct a follow-up visit to inspect those courses or areas in the school that did not meet accreditation standards. It is not necessary to inspect those courses or areas of the school that met accreditation standards during the initial accreditation visit.

(e) The accreditation authority will issue an accreditation certificate to the school if it is found that the school corrected the deficiencies.

l. Probation or non-accreditation based on HHI:

(1) The accreditation authority may issue a probation or non-accreditation of a school or course when the school is unable to meet training standards due to HHI.

(2) Schools must exhaust all efforts to rectify problems with higher headquarters, efforts must be well documented.

(3) The accreditation authority will study the documented efforts of the school to fix its problems with the higher headquarters and make an accreditation determination.

(4) The following will take place should the accreditation authority determine that a school will receive a probation or non-accreditation due to HHI:

(a) Issue a memorandum of probation or non-accreditation to the school and furnish a copy to the higher headquarters involved.

(b) Coordinate with all parties involved with the school and higher headquarters to resolve the issues affecting the accreditation.

(c) Once the issues are resolved between the school, higher headquarters, and the accreditation authority, the school and accreditation authority will follow the actions outlined in paragraph 3-44 k, above.

m. Information on team chief guidance and packaging of evaluation results follows:

(1) For any school accredited, the packet of evaluation results will contain only one checklist for Training Support.

(2) For Conduct of Training, use a separate checklist for each course evaluated.

(3) The accreditation evaluation team chief makes the overall recommendation to accredit, non-accredit, or probate accreditation based on evaluation of the organization and courses taught. Input for team chief consideration should include---

(a) All evaluation checklists and comments.

(b) The school battalion's current ISE or Training Status Report.

(c) All TO reports since the previous accreditation.

n. Active component and OCONUS TASS training battalions will typically be evaluated for accreditation during a single week. For these evaluations, the team chief should conduct an in-briefing at the beginning, an in-process review (IPR) at about halfway through the evaluation week, and an out-briefing at the end. Further description of these events follow:

(1) In-briefing. The in-briefing will include –

(a) Introduction of accreditation team members.

(b) Overview of accreditation ratings and standards for accreditation.

(c) Tentative date, time, and location of the IPR.

(d) Date, time, and location of the out-briefing.

(2) In-process review.

(a) The IPR will be conducted IAW a schedule agreed to by the team chief and the school battalion commander.

(b) The purpose of the IPR is to inform the school battalion commander of the team's findings.

(c) Each area should be briefed in detail so the commander knows exactly what is wrong/what corrective actions must be accomplished.

(d) The IPR must allow the school battalion commander the opportunity to surface differences, issues, and problems.

(e) The team chief will determine how to resolve differences, issues, and problems.

(3) Out-briefing.

(a) The out-briefing is a formal presentation of the accreditation team's findings and recommendations. It will include---

- The recommended accreditation rating.
- Evaluation results for each of the two categories on the checklist. These findings will be briefed with any corrections made since the IDT Phase of the evaluation, if applicable.

(b) Required corrective actions. If the recommended accreditation rating is Non Accredit or Probation, specify corrective measures the school must accomplish to be accredited. *Note:* Evaluation visits to TASS schools in CONUS represent a small piece

of the accreditation picture and do not require in- or out-briefings. The team chief may offer to conduct an IPR for the school battalion commander as a courtesy.

o. Report Format. The accreditation report will be prepared IAW sample format at appendix C and will contain the following elements:

(1) Paragraph one – Recommended accreditation rating. This will be a simple statement of the recommended accreditation rating and listing of courses observed.

(2) Paragraph two – Other evaluation input. Include source and location of other accreditation
in this recommendation.

(3) Paragraph three – Strengths. List significant strengths that merit general officer attention.

(4) Paragraph four – Shortcomings. List major shortcomings. If the recommendation in paragraph one is to non-accredit or probate accreditation, "Shortcomings" should immediately follow in the second paragraph.

(5) Paragraph five – Higher headquarters' issues. Identify problems requiring corrective action by some agency beyond the control of the school battalion commander (e.g., TRADOC, FORSCOM, USAREUR, USARPAC, Eighth U.S. Army (EUSA), USARC, NGB, TAG, RSC, TIE, etc.) Do not refer a problem to higher headquarters without having an audit trail clearly showing that the chain-of-command to the higher headquarters has been unable or unwilling to correct the problem.

(6) Paragraph six – General comments. Include anything that does not fall under the first four paragraphs. This could include problems that are not yet HHI but could become such if not soon resolved.

(7) Paragraph seven – Team chief and evaluators. List names and ranks or titles.

(8) Paragraph eight – POC. Provide the name and phone number of the training/TD (task) proponent DOES POC.

p. Report routing and suspense. Interim and final accreditation report guidance is as follows:

(1) Interim accreditation reports.

(a) Interim reports are required for IDT evaluations of TASS training battalions.

(b) Upon completion of IDT evaluation, if the interim report indicates non-accreditation, the team chief will immediately send it to the appropriate addressees in table 3-5. For those that indicate accreditation, the report is forwarded to the school evaluated. All IDT evaluations are part of the accreditation report and will be distributed as outlined in table 3-5 NLT 45 days upon completion of the accreditation visit.

(c) The interim report will be mailed NLT 30 days after completion of the IDT visit.

(2) Final accreditation report.

(a) The training/TD (task) proponent will process the accreditation report, commandant's letter of accreditation, and accreditation certificate.

(b) The training/TD (task) proponent commandant makes the final accreditation decision and signs the letter and the certificate.

(c) The evaluation team chief furnishes a copy of the letter and the report to the addressees in table 3-5.

q. Corrective actions. If a school's accreditation is rescinded and the school fails to meet accreditation standards during the follow-up evaluation, the accreditation authority will send a memorandum of non-accreditation through Commander, TRADOC to the appropriate command. Command staffs responsible for carrying the consequences of non-accreditation will receive a copy of the memorandum. The memorandum will advise them that the school (whose accreditation has been previously rescinded) failed to meet accreditation standards upon reevaluation. The memorandum will include the following:

(1) School's authority to teach TRADOC-approved proponent courses is withdrawn. Soldiers currently attending and in-processing to attend training may complete training.

(2) Proponent schools, ATSC, and other agencies will no longer provide training materials to the non-accredited school.

(3) NGB/USARC/proponent/FORSCOM/USARPAC/USAREUR will non-conduct the remaining schedule classes in ATRRS. In case of a TASS region where one of the region's RTIs failed to meet accreditation standards, when the ATRRS reflects a non-conduct of the remaining classes, the accreditation authority will provide a certificate of accreditation to the region. This authorizes the region to conduct training less the non-accredited RTI.

(4) HQ TRADOC (ATTN: ATED) will provide electronic notification of non-accreditation to the appropriate agencies and commands to ensure compliance with the above requirements.

(5) In instances where a proponent's school or course taught by the school receives a non-accreditation, DCSPER will accommodate soldiers to attend courses at other training sites authorized to teach the proponent's courses.

r. The following actions must happen for reinstatement accreditation and authorization to teach TRADOC-approved proponent courses:

(1) Commanders of non-accredited schools must request in writing, through command channels, an evaluation for reinstatement. The request must include the following:

(a) A detailed report of actions taken to correct all deficiencies.

(b) A list of not more than three courses the school proposes to conduct during the reinstatement evaluation. Schools that teach only one course, i.e., PLDC, will schedule one class with the minimum class size.

(c) Proposed course dates and request date for the reinstatement evaluation.

(d) If desired, a request for an assistance visit. (If requested, the assistance visit must take place a least 6 months prior to the reinstatement evaluation visit.)

(e) An estimate of the number of students expected to enroll in each course.

Table 3-5

Report Distribution Table

The team chief of---	**Sends the complete original packet to---**	And furnishes a copy to---
AC NCOA in USAREUR	Cdr, 7th Army Training Command	Cdr, USAREUR and 7th Army Cdr, TRADOC, ATTN: ATED
AC NCOA in USARPAC	Cdr, 25th Infantry Division (Light)	Cdr, USARPAC Cdr, TRADOC, ATTN: ATED
AC NCOA in EUSA	Cdr, EUSA, ATTN: EAJC-TD	Cdr, TRADOC, ATTN: ATED
AC TRADOC NCOA	Comdt, Proponent School	Cdr, TRADOC, ATTN: ATED
AC FORSCOM NCOA	Appropriate Corps, Division, or Brigade Cdr	Cdr, FORSCOM, ATTN: AFOP-TRI Cdr, TRADOC, ATTN: ATED
Drill Sergeants School (DSS)	Installation Cdr	Cdr, TRADOC, ATTN: ATED HQ, USARC, ATTN: AFRC-OPT-I
ARNG TASS school battalions	Cdr of appropriate School Regiment	Director, Army National Guard, ATTN: NGB-ART-I (for ARNG school battalions) TAGs of states involved in the accreditation (for ARNG school battalions)

		Regional TRADOC TIEs Appropriate DIV(IT) Cdr, FORSCOM, ATTN: APOP-TI Cdr, TRADOC, ATTN: ATED
USAR TASS school battalions in CONUS and Puerto Rico	Cdr of appropriate School Brigade	Chief, Army Reserve, ATTN: DAAR-OP-IT Cdr, USARC, ATTN: AFRC-OPT-I Cdr of appropriate Division (IT) Cdr, FORSCOM, ATTN: AFOP-TI Cdr, TRADOC, ATTN: ATED
USAR TASS school battalions OCONUS	Cdr of appropriate School Brigade	Chief, Army Reserve, ATTN: DAAR-OP and one of the following: • Cdr, USAREUR, (ATTN: AEAGC-T) (for Germany-based USAR school battalions), or • Cdr, USARPAC, (ATTN: APOP-TR) (for Pacific-based USAR school battalions) Cdr, TRADOC, ATTN: ATED

(f) Coordination with NGB/USARC/proponent/MACOMs to schedule up to no more than three classes for the purpose of reinstatement evaluation.

(2) If the reinstatement evaluation request is approved, the accreditation authority will conduct an accreditation evaluation of all areas in Training Support and Conduct of Training, with particular emphasis on prior deficiencies.

(3) If the accreditation authority reinstates accreditation, all command and staffs previously notified of non-accreditation will receive a copy of the accreditation authority's Memorandum of Reinstatement of Accreditation. The memorandum will serve as the authority to rescind all adverse actions described herein. The memorandum will include the following:

(a) School's authority to teach the TRADOC-approved proponent courses is authorized.

(b) Proponent schools, ATSC, and other agencies will immediately begin to provide training materials to the school.

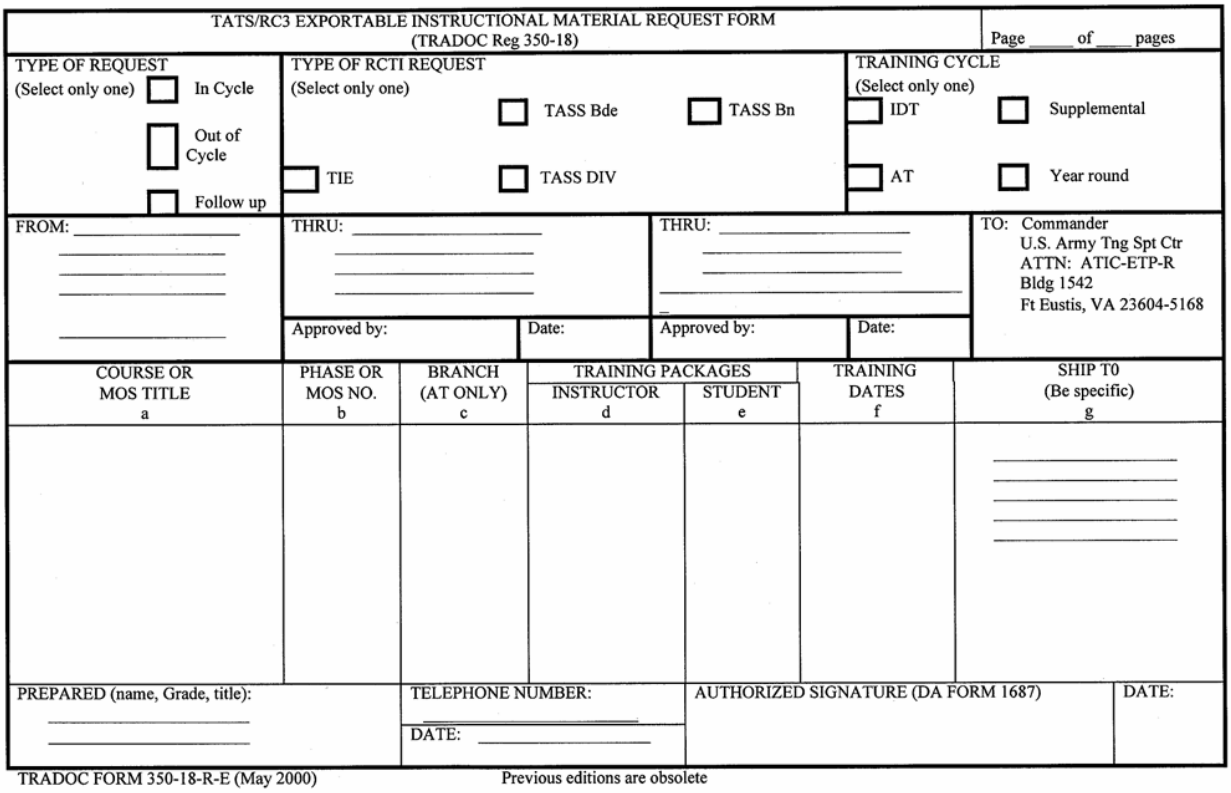
(c) GB/USARC/proponent/FORSCOM/USARPAC/USAREUR will schedule the school's courses in ATRRS.

(d) HQ, TRADOC (ATTN: ATED) will provide electronic notification of accreditation reinstatement to the appropriate agencies and commands to ensure compliance with the above requirements.

(4) The adverse consequences of non-accreditation take time and close coordination to rescind. When requesting a reinstatement accreditation, it is the responsibility of the commander of the non-accredited school (and the appropriate MACOM) to ensure availability of soldiers, instructors, course materials, training aids, equipment, and all other administrative, logistical, and service support required to conduct training and meet accreditation standards.

(5) Soldiers who attend courses conducted as part of a reinstatement effort will not suffer any consequences by the situation, regardless of the outcome of the reinstatement evaluation decision. Soldiers who successfully complete courses conducted during a reinstatement evaluation will graduate as though it were a normal course.

(6) Upon successful completion of a reinstatement evaluation, the accreditation authority will issue a certificate of accreditation to the school. In case of a region where one of the region's RTIs was excluded from the region's accreditation (ref para q(3) above), the accreditation authority will issue a new accreditation certificate accrediting the entire region.



TATS/RC3 EXPORTABLE INSTRUCTIONAL MATERIAL REQUEST FORM
(TRADOC Reg 350-18)

Page _____ of ____ pages

TYPE OF REQUEST (Select only one): ☐ In Cycle ☐ Out of Cycle ☐ Follow up

TYPE OF RCTI REQUEST (Select only one): ☐ TASS Bde ☐ TASS Bn ☐ TIE ☐ TASS DIV

TRAINING CYCLE (Select only one): ☐ IDT ☐ Supplemental ☐ AT ☐ Year round

FROM: _____

THRU: _____ Approved by: _____ Date: _____

THRU: _____ Approved by: _____ Date: _____

TO: Commander
U.S. Army Tng Spt Ctr
ATTN: ATIC-ETP-R
Bldg 1542
Ft Eustis, VA 23604-5168

COURSE OR MOS TITLE a	PHASE OR MOS NO. b	BRANCH (AT ONLY) c	TRAINING PACKAGES INSTRUCTOR d	TRAINING PACKAGES STUDENT e	TRAINING DATES f	SHIP T0 (Be specific) g

PREPARED (name, Grade, title): _____

TELEPHONE NUMBER: _____ DATE: _____

AUTHORIZED SIGNATURE (DA FORM 1687)

DATE:

TRADOC FORM 350-18-R-E (May 2000) Previous editions are obsolete

Figure 3-1. Sample TRADOC Form 350-18-R-E

TR 350-10, para 5-11, NCOA Staffing & Organization.

a. The NCOA commandant is a CSM who works under the supervision of a MACOM, installation, or division commander and that commander's CSM.

b. Staffing of NCOA is governed by the Manpower Staffing Standards System (MS3). Noncommissioned Officer Academy manpower is identified by management decision package "TSGT."

c. Commandants will attach and/or assign to the NCOA sufficient numbers of full-time SGLs, by MOS mix, and SSGLs, by CMF mix, required to train their programmed NCOES annual, by course, student loads.

(1) The SGL assigned to conduct each course/class will mentor and evaluate their students from day one through course graduation and complete separate DA Form 1059s on each student enrolled at the end of both common core and MOS technical training. It is the TRADOC Commander's intent that except where prohibited due to

safety concerns/constraints, the assigned or attached SGL should teach, coach, mentor, counsel and evaluate their students to the maximum extent possible during the conduct of all NCOES courses.

(2) The SGL MOS will be immaterial for the conduct of Phase I stand-alone ANCOC/BNCOC Common Core. However, for quality mentoring purposes, it is desired that a like CMF/MOS SGL be used to train soldiers who receive Phase I and II of their ANCOC or BNCOC congruently at their MOS proponent NCOA/school.

(3) Proponent NCOES students will not be administratively handed off, released, or turned over to the school's technical training departments at the end of Phase I ANCOC or BNCOC. While the proponent school's technical training departments may be responsible for delivering the MOS-specific curriculum, the NCOA commandant will remain responsible for each student's status. An assigned or attached academy SGL will remain in control of all NCOES attendees until they graduate or are otherwise disenrolled.

(4) Soldiers arriving at proponent schools for Phase II only (having already completed Phase I at another location), will be assigned to an academy like MOS SGL and join a like-MOS group for completion of their technical training.

(5) At ANCOC/BNCOC, no honors certificates or diplomas (other than the DA Form 1059) will be issued until the entire level of training or course (Phase II technical MOS phase/phases of the course) is completed.

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Standard 22 Reference Excerpts

AR 210-50, para 4-4, Adequacy standards for Government-controlled UPH & GH.
a. The installation commander will operate and maintain UPH and GH in accord with this regulation, and will ensure that the level of living experienced by UPH and GH residents meets or exceeds the following standards:

(1) The housing must provide a decent, safe, sanitary, and habitable accommodation in good repair. Additionally, UPH(TDY) and GH should provide a level of facilities, operations, and services comparable to a good quality, modestly-priced commercial hotel or motel.

(2) The minimum space and privacy standards for UPH in table 4-2 will be used to determine adequacy. These standards will apply worldwide. Housing managers should avoid confusing these standards with construction design standards. (See para 4-2c.)

Table 4-2. Minimum standards of acceptable space and privacy, existing UPH inventory (See notes 1 and 2.).

Grade: 03 and above and CW3, CW4, and CW5
UPH(PP): 400 square feet net living area: living room, bedroom, private bath, access to kitchen or officer dining facility receiving APF support.
UPH(TDY): 250 square feet net living area: private room, private bath.

Grade: 01, 02, W01, and CW2
UPH(PP): 250 square feet net living area: sleeping/living room, private bath.
UPH(TDY): 250 square feet net living area: private room, private bath.

Grade: E7 thru E9
UPH(PP): 270 square feet net living area: private room, private bath.
UPH(TDY): 250 square feet net living area: private room, bath shared with not more than one other.

Grade: E5 and E6
UPH(PP): 135 square feet net living area: private room, bath shared with not more than one other. (See notes 3 and 4.)

UPH(TDY): 135 square feet net living area: private room, bath shared with not more than one other. (See note 3.)

Grade: E1 thru E4 (except E1 recruits and trainees)
UPH(PP): 90 square feet net living area: not more than four per room, central bath. (See note 3.)
UPH(TDY): 90 square feet net living area: not more than four per room, except in open bay, central bath. (See note 3.)

Grade: E1 recruits and trainees
UPH(PP): 72 square feet net living area: open bay, central bath.
UPH(TDY): 72 square feet net living area: open bay, central bath.

NOTES:

1. The net living area of a private room or suite is measured from the inside face of the peripheral wall and includes all such enclosed, unshared spaces and partitions. The net living area is a shared room comprises the clear area in the sleeping room allocated for an individual's bed, locker, and circulation; it excludes lounges, bathrooms, hallways, door swing areas, and storage areas designated for military mobility and/or field gear or equipment. In open bay, net living area is one equal share per person. The open bay comprises all within the peripheral walls.

2. Standards for permanent party civilians are based on the comparable military grades in table 3-1. TDY civilians are housed as officers.

3. Minimum space criteria vary for certain UPH building designs. Paragraph 4-4d addresses these variations.

4. Per 37 USC 403 (b)(3) permanent party E6 personnel entitled to BAQ at the "without dependent" rate may elect not to occupy UPH (PP) which does not meet this minimum standard.

---

(3) The furnishings, facilities, and services identified in table 4-3 shall be provided in UPH and GH. (Table 4-3 is located at the end of this chapter.)

(4) Men and women occupying UPH will be similarly housed; however, separate and secure sleeping and bathroom facilities will be provided. Two rooms served by the same bathroom will be assigned to personnel of the same gender.

(5) Furnishings shall be provided per chapter 9.

(6) Government or commercial dining facilities should be available during reasonable hours to provide personnel in TDY status 3 meals per day, 7 days per week. These facilities must be within one-half mile walking distance or transportation should be provided. Where Government dining facilities are not available for individual meals, the soldier should certify the nonavailability of meals on his or her settlement voucher. (See paras 3-41 and 3-42.)

b. UPH and GH which does not meet adequacy standards will be brought up to standard, replaced, or disposed of as soon as reasonably possible. Appearance and habitability should be reviewed at least annually.

c. UPH and GH approved, designed, and constructed under criteria exceeding these adequacy standards will use their construction design criteria as minimum standards for the facility.

d. The current standard design for UPH(PP) is the Whole Barracks Renewal Program's "1+1" design. Whenever possible this design will be used in the modernization of troop barracks. In terms of persons per room, the capacities of UPH(PP) constructed prior to adoption of the "1+1" design differ from those for the "1+1" design. These capacity differences affect the space available per person. To accommodate these differences, space criteria will be calculated as follows:

(1) For certain UPH(PP) approved and constructed after 1973 (specifically those which used the "LBC&W" and " BB&A " barracks designs), which have a lesser space criteria than contained in the "1+1" standard design, calculate based on the occupancy of 2 soldiers in the grades corporal/specialist (E4) through private (E1) per room and 1 soldier in the grade sergeant (E5) and above per room.

(2) For other barracks (that is, the "A, " " I" or "H, " " rolling pin," and "T " or "hammer head" type buildings) which have been modernized in accord with the DA Facilities Standardization Program's previous standard design, that is, the "2+2" design, calculate based on the guidance contained in the approved standard design applied to the specific building type.

(3) For barracks designed and constructed to the "2+2 " standard design, calculate based on the occupancy of 2 soldiers in the grades corporal/specialist (E4) through private (E1) per room, 1 soldier in the grades staff sergeant (E6) and sergeant (E5) per room, and 1 soldier in the grades sergeant major (E9) through sergeant first class (E7) per 2 rooms.

e. Although soldiers in AIT are authorized 90 net square feet of living space per construction design criteria, existing facilities for AIT soldiers will be considered adequate and will not be modified simply to meet the space criteria. For those installations which conduct OSUT and have both OSUT and AIT soldiers in the same facility, 72 net square feet is considered adequate and does not authorize programming for construction or modification for these AIT soldiers. Requirements surveys will count spaces based on the current real property records (72 or 90 net square feet). When

there is justification for construction or modification of the facility for reasons other than space, the 90 square feet will apply for AIT soldiers.
f. Local regulations concerning smoking policy will be per existing Federal laws, Army regulations, or guidance. AR 600-63 contains specific guidance.

g. Standards for permanent party civilians are based on the comparable military grades in table 3-1. TDY civilians are housed as officers.

h. Temporary facilities will not be considered adequate. (See paras 3-29 and 5-2.)

i. Classification information for UPH and GH is set forth in paragraph 5-11

TR 350-18, para 3-5c(1).

3-5. Institutional training. Conduct of institutional training.

a. Prerequisites for each course are published in DA Pams 351-4 and 611-21, course management plan, and ATRRS (http://www.asmr.com/atrrs). Student qualification in prerequisite tasks is the individual's and unit commander's responsibility.

b. Schools will present training as designed and approved by training/TD (task) proponent. This will ensure tasks are trained at the appropriate skill level and to the standards prescribed for each course.

c. Student training and instructors.

(1) School staffs, faculties, and ill supervise and support instructors and students and ensure commitment to training, educating, and developing each student. Ensure facilities are provided to accommodate after hours study requirements for students.

(2) Trained, qualified, and experienced instructors will conduct and supervise student training. Trainer-to-student ratios will be IAW POI/CMP requirements and will be sufficient to ensure student control, safety, and supervision, as well as to facilitate teaching, coaching, mentoring, and developing individual students.

(3) Instructors will provide students with progressive and sequential training, as designed and approved by the training/TD (task) proponent, accurate student performance measurements and tests, and timely feedback.

TR 350-18, para 3-20f/g Funding.
f. Facilities.
(1) The component with the school mission is responsible for providing the facilities necessary to conduct training, without reimbursement.

(2) When a school wishes to conduct a course at facilities owned by another component, it will reimburse, via DD Form 448 (MIPR), the supporting installation or facility.

(3) The components are not responsible for providing facilities and services, without reimbursement, for “walk-on” students in excess of the maximum class size shown in ATRRS. “Walk-on” students in excess of the maximum class size may be transferred to another class or returned to their units of assignment, if another class is not available. The components may agree to provide the resources necessary to accommodate “walk-on” students.

g. Billeting. Installation commanders will make every effort to billet students on post. Installation commanders will not require students not in a temporary duty (TDY) status to maintain a course related bachelor officer quarters/bachelor enlisted quarters for which the student must pay.

(1) Courses currently conducted with billeting provided at no cost to the students, will continue as such.

(2) Billeting will be provided to students from all components on an equal basis, regardless of training status (e.g. AT, ADT, TDY or TDY and return).

(3) If government quarters are not provided, the school will provide students a non-availability statement so indicating, and the student will be reimbursed for his costs through normal per diem claim procedures.

(4) If a school uses contract facilities, such as dormitories on a civilian education campus, and incurs a cost for such use, the school may charge students a billeting fee. Students from all components will be charged equally. Students will be reimbursed through normal per diem claim procedures. If a school chooses not to charge students, the school is responsible for payment of the billeting costs.

TR 350-10, para 2-7d.

2-7. Conduct of training. Commandants will ensure training is conducted and evaluated per the principles listed in Field Manual (FM) 25-100 in conjunction with FM 25-101 (Note: both manuals to be revised as new "3" series FM publications). Noncommissioned Officer Academy commandants will use the training schedule format outlined in FM 25-101.

a. Prior to enrollment, students must be fully capable of performing supporting individual tasks and the tasks required in the next lower level course. Commandants may evaluate student capabilities through appropriate testing, and if necessary, provide remedial training, recycle to a later class, or return to unit of assignment those students who do not meet course prerequisites or do not have the required minimum skills. Remedial training will be scheduled when applicable on the training schedule, but will not be conducted during normal POI time.

b. Schools will train tasks only at the skill level prescribed for each course.

c. Student training, SGL, SSGL and instructors.

(1) School staffs, faculties, SSGL, and training departments will supervise and support SGL, instructors, and students, and ensure commitment to training, educating, and developing each student.

(2) Trained, qualified, certified, and experienced SGL, SSGL, and instructors will conduct and supervise student training (SSGLs may be used as SGLs as the NCOA commandant deems necessary to accomplish the training mission or as temporary fill-ins when shortages of by-grade SGLs dictate the need to do so). Small group leader-to-student ratios will be sufficient to ensure student control and supervision and facilitate teaching, coaching, mentoring, and developing individual student leadership skills to the level for which training is provided. (See paragraph 2-13.)

(3) Small group leaders, SSGLs, and instructors will provide students with progressive and sequential training, accurate evaluations, and timely feedback via task performance after action reviews.

(4) When applicable, SGLs, SSGLs, and instructors will use mission orders to convey training objectives. Mission orders will clearly articulate the commander's intent. Small group leaders, SSGLs, and instructors will ensure students use mission orders to demonstrate a thorough understanding of the mission and the commander's intent.

d. Training environments must enhance learning, encourage student initiative, require students to attain and sustain high levels of discipline, have defined, publicized, and enforced standards, and focus on preparing the student to lead soldiers through training, maintenance, deployment, and sustained tactical operations in support of unit missions.

e. When possible, students will be given opportunities to gain experience by leading and/or training soldiers in other courses (for example, conduct marksmanship and physical fitness or CTT training for advanced individual training students).

f. Commandants will use proponent-developed end-of-course (Phase II) CPX, FTX, STX, or LTX, virtual or live, in the field or at a job site, as a culminating event designed to evaluate (Go/No-Go) the soldier's ability to perform the terminal learning objectives of the course to graduate. These events will be at least 72 hours in length, be scenario driven and conducted under CONOPS conditions. Leader development course proponents will publish minimum guidelines and evaluation criteria for exercise execution in the course management plan of each course they develop.

g. Student evaluations. Small group leaders and instructors will—

(1) Determine if the student has demonstrated a sufficient level of competency to pass the course IAW the student evaluation plan as prescribed in TRADOC Reg 350-70.

(2) Conduct developmental counseling to provide students information on their strengths and weaknesses, and courses of action to improve performance.

(3) Consolidate and analyze student performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commandant/Course Management Plan (CMP). Small group leaders, SSGLs, and instructors will provide students documented feedback and will use analysis results to determine ratings for completing DA Form 1059 (Service School Academic Evaluation Report (AER)) and course academic records and reports. Records and reports must adequately support appropriate administrative action for students who fail to meet course requirements.

(4) Complete an AER (DA Form 1059) for all students per AR 623-1. Whenever possible, students should receive a copy of their completed AER at graduation. However, although Army policy allows for completion within 60 days after graduation, at a minimum, students will be provided an opportunity to review their draft AER prior to departure. Written comments in block 16 will be tailored for each individual.

h. Training material. Sufficient quantities of the most current training products will be maintained for each class.

(1) Training support package and examination material.

(2) Lesson reference files and course changes.

(3) All training aids and devices referenced in the current lesson plans.

(4) Student issue materials including advance sheets, supplemental readings, compact discs, student handouts, reference books, practical exercises, and solution sheets.

(5) At least one visitor folder will be available in each classroom. See TRADOC Reg 350-18 for visitor's folder contents.

TR 350-6, Apx K, Confidence Obstacle Courses.
K-1. This appendix sets forth TRADOC policies concerning construction, maintenance and administration of COCs for IET soldiers.

K-2. Confidence obstacle courses have higher and more difficult obstacles than conditioning obstacles courses. These courses are designed to give soldiers confidence in their physical abilities, cultivate a spirit of daring, and enhance understanding of teamwork. Unlike conditioning courses, COCs are not run against time. Initial entry soldiers must be properly instructed and closely supervised.

K-3. Commanders may construct obstacles and courses that are non-standard/not addressed in this document in order to accomplish specific objectives. Non-standard obstacles and any modifications—

a. Require a safety and health risk assessment to support obstacle design, construction, method of negotiating, and applicable safety precautions.

b. Will be approved by a commander, in the chain-of-command, at a grade level as specified in TRADOC risk management policy as commensurate with the level of residual risk. The approval process includes a review by the local or supporting safety office after on-site inspection to ensure compliance with existing safety precautions.

c. Must be inspected and tested, as appropriate, prior to first use, and re-inspected and tested by a qualified safety specialist assisted by structural engineers on a semiannual basis; after any serious accident or injury; after any major repair or modification is made; or whenever obstacles are damaged or changed.

d. Criteria for safety and structural inspections will be as specified in the obstacle risk assessment and/or IAW the material manufacturer's directions. Re-inspection must include a review of the risk assessment, and an analysis and assessment of accidents and injuries sustained since the obstacle was first put into service, or put back into service, following repair, major renovation, or modification.

K-4. All safety considerations addressed in paragraph 3-24 of this regulation are applicable.

a. Initial Entry Training COC safety precautions will include:

(1) Daily inspection of structural integrity and safety devices.

(2) A current risk assessment updated prior to each day's training and updated as conditions change.

(3) Instructor training and certification on operation of obstacles prior to conduct of course.

(4) Warm-up/stretching exercises before commencing course.

(5) Muscular strength/muscle failure physical training should not be conducted within 12 hours prior to the COC.

(6) Landing/fall areas under obstacles should be raked and refilled as needed before each use. Puddles of water under obstacles should be filled to preclude a false sense of security.

(7) Training will be postponed/modified when obstacles are slippery due to inclement weather.

(8) Instructors must explain and demonstrate obstacles before allowing soldiers to negotiate them.

(9) A sign posted at each obstacle detailing exact procedures to be used to properly negotiate the event.

b. A maintenance and inspection log will be maintained for each COC. The log will include:

(1) A detailed checklist for course and obstacle inspection.

(2) A record of all course inspections and maintenance deficiencies.

(3) A list of any uncorrected deficiencies remaining on the course and countermeasures in place.

K-5. The accompanying sketches supplement FM 21-20, chapter 8, and Department of the Army Engineer Drawings 28-13-95, Confidence Course Layout Plan. They serve as the minimum construction/safety standards for COCs used by IET soldiers.

a. The “Swinger” (fig K-23) and the “Jump and Land” (fig K-24) will not be used. These obstacles are conducive to lower extremity injuries.

b. Detailed obstacle illustrations are provided for:

(1) “The Tough One” (fig K-1)
(2) “Inverted Rope Descent/The Slide for Life” (fig K-2)
(3) “Confidence Climb” (fig K-3)
(4) “Skyscraper” (fig K-4)
(5) “Belly Robber” (fig K-5)
(6) “The Tarzan” (fig K-6)
(7) “Low Belly Over” (fig K-7)
(8) “The Dirty Name” (fig K-8)
(9) “The Tough Nut” (fig K-9)
(10) “Belly Crawl” (fig K-10)
(11) “Inclining Wall” (fig K-11)
(12) “High Step Over” (fig K-12)
(13) “Swing, Stop and Jump” (fig K-13)
(14) “Six Vaults” (fig K-14)
(15) “Easy Balancer” (fig K-15)
(16) “Low Wire” (fig K-16)
(17) “The Belly Buster” (fig K-17)
(18) “Hip-Hip” (fig K-18)
(19) “Reverse Climb” (fig K-19)
(20) “The Weaver” (fig K-20)
(21) “Balancing Logs” (fig K-21)
(22) “Island Hoppers” (fig K-22)

K-6. Safety equipment (nets, pads, ground covering) must be procured from reliable sources, inspected and tested frequently, and replaced before failure/deterioration.

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Tab 23

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Standard 23 Reference Excerpts

None.

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Tab 24

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AR 210-50, para 4-4.

4–4. Adequacy standards for Government-controlled UPH and GH

a. The installation commander will operate and maintain UPH and GH in accord with this regulation, and will ensure that the level of living experienced by UPH and GH residents meets or exceeds the following standards:

(1) The housing must provide a decent, safe, sanitary, and habitable accommodation in good repair. Additionally, UPH(TDY) and GH should provide a level of facilities, operations, and services comparable to a good quality, modestly-priced commercial hotel or motel.

(2) The minimum space and privacy standards for UPH in table 4-2 will be used to determine adequacy. These standards will apply worldwide. Housing managers should avoid confusing these standards with construction design standards. (See para 4-2c.)

(3) The furnishings, facilities, and services identified in table 4-3 shall be provided in UPH and GH. (Table 4-3 is located at the end of this chapter.)

(4) Men and women occupying UPH will be similarly housed-;however, separate and secure sleeping and bathroom facilities will be provided. Two rooms served by the same bathroom will be assigned to personnel of the same gender.

(5) Furnishings shall be provided per chapter 9.

(6) Government or commercial dining facilities should be available during reasonable hours to provide personnel in TDY status 3 meals per day, 7 days per week. These facilities must be within one-half mile walking distance or transportation should be provided.Where Government dining facilities are not available for individual meals, the soldier should certify the nonavailability of meals on his or her settlement voucher. (See paras 3-41 and 3-42.)

b. UPH and GH which does not meet adequacy standards will be brought up to standard, replaced, or disposed of as soon as reasonably possible. Appearance and habitability should be reviewed at least annually.

c. UPH and GH approved, designed, and constructed under criteria exceeding these adequacy standards will use their construction design criteria as minimum standards for the facility.

d. The current standard design for UPH(PP) is the Whole Barracks Renewal Program's "1+1" design. Whenever possible this design will be used in the modernization of troop barracks. In terms of persons per room, the capacities of UPH(PP)constructed prior to adoption of the "1+1" design differ from those for the "1+1" design. These capacity differences affect the space available per person. To accommodate these differences, space criteria will be calculated as follows:

(1) For certain UPH(PP) approved and constructed after 1973(specifically those which used the "LBC&W" and"BB&A" barracks designs), which have a lesser space criteria than contained in the "1+1" standard design, calculate based on the occupancy of 2 soldiers in the grades corporal/specialist (E4) through private (E1) per room and 1 soldier in the grade sergeant (E5) and above per room.

(2) For other barracks (that is, the "A,""I" or "H,""rolling pin," and "T" or "hammer head" type buildings) which have been modernized in accord with the DA Facilities Standardization Program's previous standard design, that is, the "2+2" design, calculate based on the guidance contained in the approved standard design applied to the specific building type.

(3) For barracks designed and constructed to the "2+2" standard design, calculate based on the occupancy of 2 soldiers in the grades corporal/specialist (E4) through private (E1)per room, 1 soldier in the grades staff sergeant (E6) and sergeant(E5) per room, and 1 soldier in the grades sergeant major (E9)through sergeant first class (E7) per 2 rooms.

e. Although soldiers in AIT are authorized 90 net square feet of living space per construction design criteria, existing facilities for AIT soldiers will be considered adequate and will not be modified simply to meet the space criteria. For those installations which conduct OSUT and have both OSUT and AIT soldiers in the same facility, 72 net square feet is considered adequate and does not authorize programming for construction or modification for these AIT soldiers. Requirements surveys will count spaces based on the current real property records (72 or 90 net square feet). When there is justification for construction or modification of the facility for reasons other than space, the 90 square feet will apply for AIT soldiers.

f. Local regulations concerning smoking policy will be per existing Federal laws, Army regulations, or guidance. AR 600-63 contains specific guidance.

g. Standards for permanent party civilians are based on the comparable military grades in table 3-1. TDY civilians are housed as officers.

h. Temporary facilities will not be considered adequate. (See paras 3-29 and 5-2.)

i. Classification information for UPH and GH is set forth in paragraph 5-11.

AR 210-50, Table 4-2.

Table 4–2
iMnimum standards of acceptable space and privacy, existing UPH inventory (See notes 1 and 2.)

Grade: 03 and above and CW3, CW4, and CW5
UPH(PP): 400 square feet net living area: living room, bedroom, private bath, access to kitchen or officer dining facility receiving APF support.
UPH(TDY): 250 square feet net living area: private room, private bath.

Grade: 01, 02, W01, and CW2
UPH(PP): 250 square feet net living area: sleeping/living room, private bath.
UPH(TDY): 250 square feet net living area: private room, private bath.

Grade: E7 thru E9
UPH(PP): 270 square feet net living area: private room, private bath.
UPH(TDY): 250 square feet net living area: private room, bath shared with not more than one other.

Grade: E5 and E6
UPH(PP): 135 square feet net living area: private room, bath shared with not more than one other. (See notes 3 and 4.)
UPH(TDY): 135 square feet net living area: private room, bath shared with not more than one other. (See note 3.)

Grade: E1 thru E4 (except E1 recruits and trainees)
UPH(PP): 90 square feet net living area: not more than four per room, central bath. (See note 3.)
UPH(TDY): 90 square feet net living area: not more than four per room, except in open bay, central bath. (See note 3.)

Grade: E1 recruits and trainees
UPH(PP): 72 square feet net living area: open bay, central bath.
UPH(TDY): 72 square feet net living area: open bay, central bath.

Notes:
[1] The net living area of a private room or suite is measured from the inside face of the peripheral wall and includes all such enclosed, unshared spaces and partitions. The net living area is a shared room comprises the clear area in the sleeping room allocated for an individual's bed, locker, and circulation; it excludes lounges, bathrooms, hallways, door swing areas, and storage areas designated for military mobility and/or field gear or equipment. In open bay, net living area is one equal share per person. The open bay comprises all within the peripheral walls.

[2] Standards for permanent party civilians are based on the comparable military grades in table 3-1. TDY civilians are housed as officers.

[3] Minimum space criteria vary for certain UPH building designs. Paragraph 4-4d addresses these variations.

[4] Per 37 USC 403 (b)(3) permanent party E6 personnel entitled to BAQ at the 'without dependent' rate may elect not to occupy UPH (PP) which does not meet this minimum standard.

AR 210-50, Table 4-3.

Table 4–3
Minimum furnishings, facilities, and services for UPH and GH

Furnishings/facilities/services.	UPH(PP)			UPH(TDY) and GH
(See note 1.)	Barracks	SEQ	OQ	
IN ROOM				
Ash Tray (See note 2.)				M
Bath mat, cloth				M
Bath, private (See note 3.)				R
Bathroom mirror well-lighted	M	M	M	M
Bathroom shelf space or vanity	M	M	M	M
Bedspread (one per bed)	M	M	M	M
Bedspring	M	M	M	M
Bedstead	M	M	M	M
Blanket for bed (as required)	M	M	M	M
Bookcase	R	R	R	R
Carpeting, wall-to-wall or area rug		R	R	R
Chair, easy (one per UPH room; 2 per GH room)	R	R	M	
Chair (for writing desk) (See note 4.)	M	M	M	M
Chest of drawers or dresser		M	M	M
Clock radio, alarm clock, or wake up service				M
Clothes hangers				M
Coffee maker				R
Cribs (available for checkout) (See note 5.)				M
Desk or writing surface (See note 4.)	M	M	M	M
Drinking glass (one per person)				M
Electric outlets convenient to bathroom mirror and to accommodate lamps, radios, and other appliances	M	M	M	M
Facial tissue				M
Ice bucket				M
Information packet (includes service charge rate, support activities, occupant responsibilities, check-out time, and other info as appropriate)				M
Kitchenette (See note 6.)				R
Lamp, floor (one per easy chair)		R	R	R
Lamp, table/desk (one per desk)	M	M	M	M
Lock and keys for doors to all rooms, inside and outside locks or latches on all bathrooms or kitchen facilities between rooms	M	M	M	M
Luggage rack or bench				M
Maid service, daily		R	R	M
Mattress with cover or pad	M	M	M	M
Mirror (one per bedroom)	R	R	R	M
Pillow (one per person)	M	M	M	M
Pillowcase (one per pillow)	M	M	M	M
Refrigerator in room or ice machine in common area	R	M	M	M
Sheets (one set per bed)	M	M	M	M
Shower curtain or enclosure	M	M	M	M
Telephones				R
Toilet tissue in barracks and transient housing and in shared baths	M			M
Towel rack	R	M	M	M
Towels (hand and bath), wash cloth, soap				M
Television, color (one per unit)				M
Wall art and decorations				M
Wardrobe, secure (one per occupant when built-in not available)	M	M	M	M
Wastebasket	R	M	M	M
Window coverings - shades, blinds, or drapes	M	M	M	M
COMMON AREA				
Bell cart				R
Class 'C' or commercial telephone	R	M	M	M
Cleaning equipment, vacuum cleaner, buffer	M	M	M	M
Furniture, clean and in good condition	M	M	M	M
Game room	R			
Ice machine	R	R	R	M
Ironing board (See note 7.)				M
Laundry facilities or services within one-half mile	M	M	M	M
Newspaper dispensers	R	R	R	R
Public restrooms		R	R	R
Steam iron (See note 7.)				M
Television in lounge or dayroom	M	M	M	R
Vending or sales facilities	R			M
THROUGHOUT THE BUILDING				
Adequate air-conditioning (where authorized)	M	M	M	M

Table 4–3
Minimum furnishings, facilities, and services for UPH and GH—Continued

Furnishings/facilities/services.	UPH(PP)			UPH(TDY) and GH
(See note 1.)	Barracks	SEQ	OQ	
Adequate electrical system and lighting	M	M	M	M
Adequate heating	M	M	M	M
Adequate plumbing system	M	M	M	M
Adequate ventilation	M	M	M	M
Color coordinated interior	M	R	R	M
Floor covering in good repair or properly finished wood floors	M	M	M	M
Smoke detectors and fire alarms	M	M	M	M
Trash containers and removal service, as required	M	M	M	M
Wall and ceiling surfaces in good condition	M	M	M	M
OUTSIDE				
Bicycle rack	R	R	R	
Exterior identification signs		M	M	M
Landscaping	R	R	R	M
Paved lighted parking space (See note 8.)	R	R	R	M
Paved lighted walkways	R	R	R	M

Notes:

[1] Space permitting, the minimum criteria indicated in the table are mandatory (M) or recommended (R) in permanent party housing, excluding open bay, and in transient housing.

[2] Ash trays will be placed only in rooms designated for smoking.

[3] Private bath is mandatory for GH.

[4] Chair (for writing desk) and desk or writing surface are mandatory for UPH(PP) and UPH(TDY)

[5] Cribs are mandatory for GH only.

[6] Kitchenettes are recommended for guest houses only.

[7] Ironing board and steam iron will be made available on loan either at the reception desk or in the service area.

[8] One parking space per officer (7 per 10 enlisted)UPH(PP) and UPH(TDY) billeting spaces. One space per each GH unit.

TR 350-6, para 2-9.

2-9. Separate and secure environment.

a. Physical security measures:

(1) Each gender has an independent sleeping area.

(2) Each gender has its own latrine.

(3) Each gender has its own entrance to the living area.

(4) Entrances to sleeping areas are monitored by fireguards during sleeping hours.

(5) Door alarms installed. Doors will be locked if so equipped.

(6) Fire-safe barrier wall placed between the genders (same floor) and alarmed. If conditions for fire-safe barriers cannot be met, genders will be separated by floor, wing or building.

b. Supervisory measures:

(1) Noncommissioned officers supervise the barracks around the clock.

(a) Drill sergeants will serve as Charge of Quarters (CQ) on duty during sleeping hours in BCT and the BCT portion of OSUT. Soldiers in the rank of sergeant (E5) and above may serve as CQs in the RECBN.

(b) Noncommissioned officer cadre members, to include instructors, company personnel, and drill sergeants, can serve as CQs during sleeping hours in AIT and the AIT portion of OSUT.

(2) The CQ may be assisted by two enlisted soldiers who serve as "runners", and who maintain entrance security when the CQ conducts inspections. The two runners must be of the same gender, but do not need to be of the same gender as the CQ.

(3) Each gender-separate living area will have two fireguards who ensure no unauthorized personnel enter the area during sleeping hours.

(4) Duty officers and NCOs from the company, battalion, and brigade headquarters will conduct periodic checks.

(5) All soldiers will sleep in PT shorts and shirt.

(6) If an inspector is not of the same gender as the soldiers in the living area being inspected, the inspector must be accompanied by personnel of the same gender as the inspected area.

(a) In BCT, OSUT (Phases I, II, and III), and RECBN units, the personnel accompanying the drill sergeant or inspector cannot be an IET soldier.

(b) For OSUT (Phases IV and V), AIT, and DLIFLC, the person accompanying the drill sergeant or inspector may be an IET soldier, and could be one of the soldiers serving as a fireguard in the bay being inspected.

(7) During "lights out," only cadre leadership are allowed in the barracks.

c. On a case-by-case basis, AIT installation commanders and commandants may request from HQ TRADOC, ATTN: ATTG-IT, an exception to the physical security and supervisory measure requirements of the separate and secure policy. Commanders must certify that every attempt was made to comply with this policy, and its execution was found to be impracticable for units with small gender populations.

TR 350-10, para 2-5.

2-5. Billeting. Installation commanders will make every effort to billet students on post. Students not in a temporary duty (TDY) status will not be required to maintain course-related bachelor officer/enlisted quarters for which the student must pay. NCOES billeting priority is PLDC, BNCOC, and ANCOC. Within local constraints—

a. Students attending PLDC will be billeted at the NCOA the entire course in squad-size bays to keep classes, small groups, and squads together as much as possible.

b. Students attending BNCOC will be billeted in two- to four-person rooms with adequate living and study facilities.

c. Students attending ANCOC will be billeted in one or two-person rooms with adequate living and study facilities. If billeting, as prescribed above, is not available, ANCOC students will be billeted in bachelor enlisted quarters, visiting enlisted quarters, or off post. Note: NCOA commandants may allow locally assigned ANCOC and BNCOC students (those attending who are within a 50 mile radius of their home station) to reside in their local unit or government/

civilian quarters as long as all course leadership roles, performance and academic evaluation requirements/standards can be met.

d. Noncommissioned Officer Education System students will not be billeted with soldiers attending AIT. If billeting in the same building with AIT soldiers is unavoidable, access to respective living areas must be restricted.

e. Adherence to above policy will be reviewed during accreditation visits. Noncompliance will be noted in the initial Quality Assurance (QA) program accreditation report as a higher headquarters issue and documented on the next visit's report as a critical deficiency, if conditions have not improved and no plan has been initiated by the organization to upgrade facilities to meet minimum standards.

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Standard 25 Reference Excerpts

TRADOC Memorandum dated Oct 06, 2001 Subject: Student Academic Measurement/Testing Policy Guidance
Use of Pretests

1. TYPES OF PRETESTS DEFINED: A pretest can serve 2 purposes –
a. First, a pretest can be used to verify if the learner has the prerequisite (entry-level) skills, knowledge, and competencies (if any) which should have been acquired previously and will be necessary in order for the learner to master the material in the lesson/module. This is called "prerequisite verification pretest" or just "prerequisite pretest".

b. Secondly, a pretest can be used to test the learner's prior mastery of the learning objectives (knowledge, skills, and competencies) taught by the subsequent phase/ module/lesson (i.e., for the purpose of "testing out" or reducing the objectives that must be mastered within the lesson/module/phase/course). This is called "objective mastery pretest" or just "mastery pretest." Other terms used to describe this usage have included "summative tests" and "mastery tests."

NOTE: Sometimes the term "diagnostic test" is used interchangeably to describe either of the above types of pretests. The use of the term "diagnostic test" gives the learner the mistaken impression that the test has analyzed the learner's skill level. Use the above terms to insure clarity and preciseness.

2. PREREQUISITE PRETESTS:
a. A prerequisite test may be given at the beginning of any type of instructional unit (IU) as needed, to verify mastery of prerequisite objectives/tasks. If the learner's results verify that s/he has obtained the required prerequisite skills, knowledge, and/or competencies, s/he is allowed to proceed with the subsequent training.

b. If the learner does not possess necessary prerequisite skills and knowledge, action must be taken. These actions may include (in combination where appropriate):
(1) exclusion (not allowing learner to take course),
(2) remediation before acceptance/entry,
(3) conditional entry with the simultaneous administration of remediation with new training,
(4) conditional entry pending proof of ability based on in-course tests, or
(5) conditional entry based upon other evidence that the student can reasonably master the material as expected (i.e., without wasting resources on remediation).

c. Entry-level skill/knowledge testing is most important:
(1)Prior to the first lesson of distinct courses, phases, modules, or lessons where the entry level skills of the different courses, phases, or modules might be different; and,
(2)When there is a substantial break in time between the courses, phases, or blocks (for instance, a break of 2 months between a DL phase and a resident phase of a course, or a break of several years between functional training and advanced training in that functional area.).

3. MASTERY PRETESTS
a. A mastery pretest determines the prior attainment of mastery of the tasks and/or supporting skills and knowledge (learning objectives) taught within the subsequent instructional unit. It is, in fact, a version of the instructional unit's tests/post-test, in that it covers the same objectives. Objective mastery pretests are used to "test-out" (which is really another way of certifying mastery) of objectives taught during an instructional unit (IU) and may be given before a course, phase, module, or lesson.

b.If the learner "tests-out" of certain instruction (especially group-paced Ius or instruction which has a combination of self-paced and group-paced instruction), decisions must be made as to how the learner will be managed. These options include: simply allowing the learner to skip the "mastered" potion of the instruction, moving him/her to a class that is further along in the curriculum (i.e., recycle forward), giving him/her advanced training, using the learner as assistant instructor/aid/tutor, giving the learner free time, returning the learner temporarily to the unit, or giving him/her other "rewarding"-type activities. If simply allowing the learner to skip the mastered portion or to be recycled forward is not feasible, use as an assistant/aid is recommended. A note of caution: If the learner feels that objective mastery performance will result in non-rewarding/ discouraging consequences, the test results may not be a valid measure of his/her level of mastery. As a minimum, learners must be praised for successful pretest objective mastery and not required to take the mastered instruction.

4. GENERAL POLICY: IAW TR 350-70, the policy for pretests is as follows:
a. Mastery pretests are mandatory for self-paced, computer-delivered training.
In other situations, objective mastery pretests are highly recommended (with the exception noted in para. 5 below). Justifications for exceptions to this policy must be based upon para. 5 below and be documented.

b. Performance-based, prerequisite pretests are highly recommended in the absence of other clear and convincing evidence that the learner has obtained mastery of the necessary prerequisite objectives.

(1) To avoid use of these pretests, the TD proponent must have assurance – from knowledge based on learner records or learner performance on previous lessons, modules, or courses – that the learner **does have** the entry-level skills required.

(2) Sufficient evidence to waive the prerequisite test requirement must be determined on a learner by learner basis and be documented.

(3) If a learner is excused from taking a prerequisite test:

(a) Inform the learner that s/he is being allowed to enter the course conditionally, based upon the evidence of attainment of prerequisites. Inform other personnel (i.e., the learner's commander/supervisor) as necessary or by local SOP of the status of the learner.

(b) Keep a watchful eye on the learner for any failure to progress based upon lack of prerequisites.

5. PERFORMANCE TEST POLICY:
It is recognized that performance pretests (either prerequisite or mastery) given to untrained personnel can sometimes be dangerous to the learner or others. Therefore:

a. Performance pretests are recommended (in the absence of clear evidence of prerequisite attainment) if, and only if, there exists (from the conduct of a risk assessment) a clear indication that the administration of the prerequisite tests will not be harmful to personnel or equipment. Simply put, if a learner can do harm to him/herself or others (or to equipment) trying to perform tasks/skills in which s/he is clearly inept, don't ask him/her to try to perform, or stop the test immediately if testing has begun.

b. If prerequisite verification performance pre-testing is not feasible, you may have to assume attainment of the performance prerequisite from less than "clear and convincing" evidence of mastery attainment. This less than clear and convincing evidence may include performance-based test results, supervisor/peer assessments, self-assessments, prior training record, etc.

c. If mastery performance pre-testing is not feasible, the learner must be required to go through all the training until it is known that the learner can be tested on the task/TLO safely.

6. TABLE SUMMARIZATION: The policies in the paragraphs above are summarized in the table below:

If the pretest use is:	**And the pretest is:**	**and:**	**and there is:**	**Then pre-testing is:**
Prerequisite verification	performance-based	N/A	no convincing proof of prior objective mastery	HIGHLY RECOMMEND-ED
	performance	the performance of the objective can be safely tested	no convincing proof of prior objective mastery	HIGHLY RECOMMEND-ED
	either performance-based or performance	N/A	convincing proof of prior objective(s) mastery	Unnecessary
Objective mastery determi-nation	Performance	the performance of the objective can be safely tested	N/A	HIGHLY RECOMMEND-ED

If the pretest use is:	And the pretest is:	and:	and there is:	Then pre-testing is:
	Performance-based (assumes performance can be safely tested)	the subsequent instruction which teaches the objective is self-paced IMI	N/A	MANDATORY
		the subsequent instruction is not self-paced IMI	N/A	HIGHLY RECOMMEND-ED
For Either purpose	Performance	the performance objective **cannot** be safely tested	N/A	DO NOT PRETEST VIA HANDS-ON (See para. 5)

6. ADMINISTRATION OF PRETESTS:

a. Often the two types of pretests can be administered simultaneously to a learner as a single test or a series of tests that measure attainment of the prerequisite objectives as well as measure the prior attainment of the "to-be-taught" objectives. Each objective, whether prerequisite or to-be-taught, must be tested independently for mastery based upon the test-grading criterion (cutoff/passing/mastery level). Based upon the results obtained for each objective, the appropriate action must be taken.

b. To avoid having a student enter a later phase of course without having the necessary phase prerequisites, test all prerequisites before entering the first phase/module/ lesson (i.e., don't wait to prerequisite test until just before the prerequisite skill/knowledge must be used --- there may not be time to plan/take mitigating action).

c. To ensure training resources are not wasted, proctored prerequisite testing before the student shows up at a training site (i.e., unit, DL site, or other approved personnel) is highly recommended (i.e., test before any resources are wasted). As necessary, the unit commander/delegate or other responsible individual should ensure the test is administered and controlled.

End-of-Phase Tests for DL Phases of Courses

1. IAW paragraph VI-7-4 e. (3), TR 350-70, an end-of-phase test:
a. Evaluates a learner's accomplishment of all learning objectives presented in the phase.
b. Is recommended for courses structured where there is a significant time gap between the phases or there is a major change in training focus between phases.
c. Is **not** required.

2. The following guidance applies to the use of end-of phase tests for courses that have a DL phase followed by a resident phase.

3. While the decision to use end-of-phase tests is indeed a design issue that is specific to each DL course/module, the use of an end-of-phase test is highly recommended if the tasks/skills/knowledge taught are not conclusively acquired (i.e., their acquisition is determined via testing) within the sequential and progressive administration of the courseware (i.e., if certification of competency does not takes place after each lesson/ module incrementally throughout the DL training) , and one or more of the following conditions is true:

a. The resident phase quickly builds upon the expected mastery of the skills/knowledge/ performances taught in the DL phase. For example, the resident phase moves quickly into the hands-on practice of procedures taught within the DL phase.

b. There is a substantial break between the DL phase and the resident phase.

c. The DL phase itself is of such length that the skills/knowledge/performances taught early in the phase are suspected of decaying, or have been proven to decay over time, and must be reinforced/sustained before the leaner exits the phase. NOTE: This last statement might also apply to a course that is taught entirely by DL (although the test by definition is now an “end-of-course” test, not an “end-of-phase” test).

d. There is no time within the resident phase for re-testing or remediation.

e. The end-of-phase test is really a “capstone” performance or performance-based exercise used to measure the mastery of the critical combination of skills/knowledge/performances taught individually throughout the phase.

Note: “Conclusively acquired” means that the mastery level for the task/skill/knowledge taught within the DL phase is sustainable until the time it is needed in the resident phase.

4. Remember that the end-of-phase test is the last opportunity to determine task/skill/ knowledge mastery and provide remediation-to-mastery prior to the use of the skills/knowledge within the subsequent phase. Therefore, the use of an end-of-phase test must be seriously considered. Some mitigation of risk is possible by the planned pre-testing of the resident phase prerequisites at the beginning of the resident phase (i.e., “pre-testing” those skills/knowledge which should have been acquired during the DL phase (See Pretests)). Nevertheless, it is much more cost-effective to provide remediation and re-testing during the DL phase than to have to retrain/remove from training after the student reports to the resident phase.
Conduct of Test Reviews, Remediation, and Retests

Standard 25 Reference Excerpts

1. Definitions:

a. A **test review** is a learning event/activity that occurs after the grading of tests which provides to the learner the items that were missed and short immediate remediation on the correct answer. This remediation usually consists of identification of the correct answer and the reasons their answer was wrong and/or the correct answer was correct. NOTE: To avoid confusion with a slightly different procedure, a test review should not be referred to as an after-action review (AAR).

b. **Remedial instruction (aka "remediation')** are those learning activities/events provided to a student after test grading in preparation for re-testing to provide special, additional, or refreshment training on those learning objectives not mastered.

c. A **retest** consists of a second or subsequent test administered to a learner which covers the learning objective(s) not mastered (passed) on the preceding test administration.

2. Test Review:

a. The conduct of a test review after each test is a mandatory element of instruction.

b. A test review should be conducted on individual test items missed even if all learners mastered all objectives.

c. Each student should be given feedback on each item that they missed (i.e., every missed item covered either individually or as a group). To accomplish this, it is recommended that you hand out some sort of form to each student indicating which questions were missed (only those missed by that student), then go over each question missed by any student. This should include "working" through problems.

d. Methods to cover the items missed other than returning of the actual test/test "booklet" are recommended.

e. Since the test review is critical learning activity, time and care should be given to its preparation.

g. During the test review, it is also highly recommended that any learner(s) comments be captured which might indicate the need for test/instructional improvement. Involvement of a training/test developer is recommended.

h. Slight modification to the above procedures will be necessary when the instruction and test review is conducted via self-paced instruction. For example, for self-paced instruction delivered by computer, test review and remediation should be programmed into the course design and testing strategy, and an unlimited number of retest/remediation cycles are allowed until the maximum time to complete the lesson is reached.

3. Remediation:
a. Remediation on every TLO not mastered on the first test administration is mandatory.

b. The activities involved in remediation must directly address only the TLOs not mastered.

c. The number of TLOs that must be re-mediated will be the primary determining factor on the extent of remediation before re-testing.

d. In general, the learner should be re-mediated until s/he is confident s/he has mastered the objective.

4. Retests:
a. After remediation, at least one retest on each TLOs not mastered is mandatory.

b. The decision to allow subsequent remediation and retests after the initial retest should be made after consideration of the following:

(1) What will be the impact if further re-testing is not allowed (i.e., recycle, course expulsion, reassignment, reclassification, non-promotion, Army expulsion, etc.)?

(2) What resources have been expended thus far to get the learner to this stage of their training?

(3) Are there sufficient resources (including time) to conduct further remediation and re-testing?

(4) Is there evidence to suggest that the learner(s) will or will not master the objective with further remediation?

(5) Are there other exigent circumstances that will preclude further remediation and re-testing?

c. It is highly recommended that human decision-makers most knowledgeable of the above factors be the final deciding authority on decisions to stop/continue re-testing.

d. The exact number and timing of retests and how decisions to stop/continue re-testing will be made must be documented in the Student Evaluation Plan and provided to each student before the first test is administered.

TR 350-18, para 3-11.
Test control procedures. Student Performance Measurement/Test control procedures are delineated in TRADOC Reg 350-70, chap VI-7. Test control procedures for classified material is found in AR 380-5. Testing policy is reiterated for language testing in AR 611-6.

TR 350-70
VI-7-5. Student Evaluation Plan

Purpose a. The Student Evaluation Plan ---
(1) Establishes student responsibilities.
(2) Establishes training graduation (pass/fail) criteria.
(3) Details how the course proponent will determine if the student has demonstrated a sufficient level of competency to pass the specified course or training.
(4) Lays out the course testing strategy to evaluate the student on the training.

Requirements b. A Student Evaluation Plan ---
(1) Must be developed for each training course.
(2) Informs students, instructors, and other personnel of graduation requirements.
(a) A copy of the Student Evaluation Plan must be provided and explained to each Initial Entry Training (IET) student at the beginning of each course.
(b) A copy of the Student Evaluation Plan must be explained to all other trainees at the beginning of each course and posted for the students' reference.
(3) Must reflect TRADOC testing policy.
(4) Must be included in the TATS Course Training Support Package (TSP).

Procedure c. The general steps involved in writing the Student Evaluation Plan are as follows:

Step	Action
(1)	Establish policies and procedures which state student responsibilities.
(2)	Establish how the proponent school will determine if the student has demonstrated a sufficient level of competency to pass the specified training course.
(3)	Detail how the student's performance will be evaluated.
(4)	Identify all course tests.
(5)	Establish weight points for each test.

(6)	Establish course completion/graduation requirements. (a) Establish "GO/NO GO" requirements for each performance test based on the tasks standards that the training is based upon and the learning objectives for the training. (b) Establish minimum passing score for each performance-based test using the learning objective standards, the performer/non-performer discrimination (i.e., as determined from test validation), and/or expert opinion analysis. © Establish final grade requirements. (d) Establish minimum course attendance requirements. (e) Identify specific tests that must be satisfactorily completed to graduate.
(7)	Establish testing procedures: (a) Delineate school/course policy for academic and/or non-academic probation. (b) Delineate school course policy for academic and/or non-academic relief/recycle policies. © Include a flow chart to depict the relief/recycle process .
(8)	Define sustained poor performance (if applicable).
(9)	Include affiliation grade, college credit, or American Council on Education (ACE) information (if applicable).
(10)	List specific lessons tested in each test/evaluation.
(11)	Delineate counseling policy.
(12)	Delineate remedial training policy.
(13)	Delineate reteaching/retesting policies and procedures.
(14)	Delineate pretesting (testing out) procedures. ***Note:*** Testing-out is built into CBI programs.
(15)	Establish test-challenging procedures.
(16)	Identify other evaluation requirements, such as the Army Weight Control Program and Physical Fitness Test, and define the impact of each on course completion/graduation.

I-7-5. Student Evaluation Plan WeightPoint Description and Assignment

d. Weight points are a means of identifying which lessons, tests, learning objectives, etc., are more or less important in relation to the total training program.

(1) Weight points will be assigned to each test according to the importance of the test to job performance.

(2) A scale of 0 to 1000 is often used. Weight point distribution will be shown in the student evaluation plan.

(3) Assigning weight points can be made objective by having several subject matter experts independently assign a weight point value to each item, learning objective, or test being ranked, then averaging the results. The average value is assigned to the item.

Sample e. See Appendix I for a sample Student Evaluation Plan.
Note: The sample Student Evaluation Plan is just a guide. Proponent schools may modify the plan to meet their specific needs. It is important that the plan details exactly what the student must do to satisfactorily complete the training.

Completion f. The Student Evaluation Plan is considered complete when approved for implementation by the appropriate command authority.

TR 350-10, para 2-9(f).

2-9. Academic test and retest. Criterion-referenced tests, tailored to measure performance abilities, will be used to measure student proficiency per TRADOC Reg 350-70. IAW TRADOC memorandum, ATTG-CD, 6 Oct 01, subject: Student Academic Measurement/Testing PolicyGuidance course proponents will establish the minimum standard (academic score percentage), for written and performance tests, used to determine successful completion of a block of instruction and/or a course. Course proponents must spell out these standards in a written evaluation plan to be issued to each student upon enrollment. Proponents must also include these standards in course management plans and implementing instructions, if course is taught at more than one training location/site. Commandants must test, retest, pass, fail, dismiss, and honor students IAW the policy and procedures in this regulation and the student evaluation plan.

a. After remedial training, commandants may retest one time those students who fail to achieve established minimum written or performance standards on an objective.

b. Retest scores will be annotated in student course records along with counseling and remediation documentation. However, students who require and pass a retest will receive the minimum passing score for that event and will automatically be removed from class honors consideration (except in the case of IMI self-paced instruction). Commandants will dismiss soldiers from the course who fail to meet minimum passing standards or academic score on any performance or written retest.

c. Certain exceptional circumstances may arise during training that might require a second retest (such as the sudden illness or emergency removal of the student during the retest administration, or during the NCOES student's appeal process a disinterested sergeant major determines that another retest is warranted). Based upon a determination and documentation by the commandant that these exceptional circumstances exist, the student is deemed to not have completed the retest and will be retested again. This option must be listed within the student evaluation plan for a course.

d. Commandants will dismiss students from the course who fail to meet performance standards for a graduation requirement, and/or require extraordinary assistance to remain in the course.

e. School commanders and commandants will follow the dismissal and student appeal procedures found in ARs 135-175, 350-1, and 600-8-24.

f. Every effort will be taken to insure that course testing instrument integrity/security is maintained. As a minimum, schools will maintain test materials in a secure location that is inaccessible to students with test instruments and answer keys kept in separate vault/file containers. Test material security procedures will be included in each school's/NCOA's testing standing operating procedures and other applicable test control publications. Each school's/NCOA's appointed test control officer will maintain records of test instrument destruction.

AR 351-1, para 6-15.
6–15. Student evaluation
a. Student evaluation and critique methodology will be established for each NCOA POI to measure student proficiency in any given area. The NCOA cadre will—

(1) Evaluate the soldier in each leadership position occupied.
(2) Critique the soldier's performance against training objective standards.

b. Each student will submit an evaluation of the course upon completing the course.

c. When possible, the training standard will be observable and measurable. The soldier—

(1) Must attain the standard on a "Go/No Go" basis.
(2) Will be advised of required standards before beginning training for any tasks.

d. Student training records will be maintained on each NCOA student. These records will include:

(1) Academic evaluation sheets.
(2) Student observation reports.
(3) Counseling records.
(4) Leadership position evaluations.
(5) APFT results (for courses 56 days or longer).
(6) Peer ratings.
(7) Other student performance evaluation records.
(8) An Academic Evaluation Report (AER), DA Form 1059. This report will be completed Per AR 613-1. The AER assesses each soldier using the "whole person concept." Therefore, input is required from all instructors and evaluators with whom the student has had contact.

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Standard 26 Reference Excerpts

AR 350-10, para 1-4q.
Commanders of MACOM Proponent School Systems will—
(1) Report accurate and timely information in ATRRS.
(2) Monitor the data provided by their subordinates.
(3) Enforce this regulation within the MACOM.

AR 350-10, para 3-1a-c, Quota Management System.

The QMS is a subsystem of ATRRS used to support training execution management of all training not designated as IET. QMS provides an interactive means for entering, updating, and reviewing information relating to all these courses.

a. Policy.

(1) Inputs and ouputs on a by-name basis will be posted to ATRRS not later than 10 working days after the start or end date of the class. As an exception, input and graduate information for on-site courses will be posted not later than 15 days after course completion unless prior coordination has been made with HQDA, DAPE-MPT.

(2) QMS will be the vehicle to handle quota exchanges among components. Additional quotas will be provided at the TRAP as available.

(3) Schools have 5 working days after TRAP changes have been posted to make appropriate class schedule changes on ATRRS.

(4) All reservations are to be posted to ATRRS not later than 45 days (DLI, 30 days) prior to class start date or quotas will be made available to any quota agency on a first-come basis. For situations where actual names are not known 45 or 30 days (DLI only) prior to start date, holds can be placed on quotas until names can be substituted. Holds not changed to valid names 15 days prior to class start are dropped and seats are available on a first-come, first-serve basis.

(5) Schools will not directly solicit input to training and bypass quota agency's prequalification criteria.

(6) The responsibility for arranging quota exchanges lies with the quota agencies, with the training MACOM as approval authority, unless precluded by course requisities or school policy.

(7) Component no-show rates will be based on reflected quotas versus actual inputs.

(8) Vacancies created by no-shows in classes can be filled by commanders with the local population only. Appropriate by-name information must be added to ATRRS for these individuals.

b. Process. QMS works like an airline reservation system. Following the SMDR, class schedules are loaded by proponent schools. After training MACOM approval of class schedules, an automated procedure is run (at training MACOM discretion) that fair shares quotas among input agencies based on their approved annual program. These quotas are then reviewed and fine-tuned or adjusted by the training MACOM. Reservations are made by the input agencies that will determine where spaces are avaiblable and reserves space by entering name, rank or grade, job series for civilians, social security number, gender, address, and quota source and component code for

each attendee not later than 45 days (DLI, 30 days) prior to start of class. The proponent school in conjunction with the MACOM may determine whether to nonconduct a class if the number of reservations and waits do not at least equal the minimum class size. Training MACOMs must coordinate with training input agencies prior to final decision to nonconduct a class. Quota agencies may release or request quotas any time until 45 days (DLI, 30 days) prior to the start of a class. Any quota not filled 45 days (DLI, 30 days) prior to a class start will be made available to any personnel in a " wait" status by priority for that class on a first-in, first-out basis. If any quotas still remain, they are available to any input agency on a first-come, first-serve basis. When the student physically reports for the class, the school must post ATRRS not later than 10 working days after the start of the class. If a student fails to graduate, the output status code and reason for attrition will be posted, and finally all graduates are posted not later than 10 days after end of class. If a student is scheduled for follow-on classes, as identified in ATRRS, QMS will link these courses. If a student fails or graduates from a preceding or prerequisite course, QMS will cancel or confirm the reservation to the follow-on course. QMS will provide data for updating the enlisted and officer personnel file at PERSCOM.

c. Automated Order of Merit List (OML) for BNCOC/combat support-combat service support (CS-CSS) and ANCOC. On a quarterly basis, an extract of the enlisted master file (EMF) is received that produces a prioritized OML for BNCOC/CS-CSS and ANCOC for AA soldiers. Reservations are generated for training based on priorities and the quotas that have been allocated to the MACOM.

TR 350-6, Apxs H-8 & J-2.

H-8. Reassignment of BCT/OSUT soldiers to the FTU is authorized. These soldiers will be reported in the ATRRS. Ensure FTU input and graduation data is posted into ATRRS IAW AR 350-10. Assistance for ATRRS can be obtained from HQ TRADOC, ATTN: ATOM-O.

J-2. IET soldiers who are offered a second training opportunity will be sent to the Personnel Service Center (PSC) with all documents relative to their reclassification. The PSC has access to the "TS" display on ATRRS, which is used to reclassify IET individuals.

a. The ATRRS operator will bring up the IET soldier's MOS selection "TS" display in ATRRS. The "TS" display is reviewed and updated to include the reason code for reclassification. This establishes the IET soldier's current qualifications and status in ATRRS. At this point a list will be printed providing MOSs the IET soldier is qualified to select.

b. Using the "RETAVAL" report available in the reports generator section of ATRRS, the ATRRS operator can enter the social security numbers for up to ten different individuals. ATRRS will print out a listing of the training available for each individual based on their qualifications and the available classes scheduled in ATRRS over the next 4 weeks.

The IET soldier may use this listing to select a new MOS. If the IET soldier is qualified and a training seat is available, the MOS will be reserved. When the reservation is made, a message is provided to the PSC. This is their authority to publish orders.

c. The PSC will reclassify the IET soldier within 48 hours. To save transportation costs and reduce stress on the soldier, reasonable attempts will be made to match the soldier to a MOS that is taught at the assigned installation.

d. In the case of a RC soldier, the RC Liaison NCO will seek a MOS based on a unit vacancy. If an ARNG accession module does not contain predetermined second and third choices based on unit needs, the ARNG unit and ARNG liaison NCO at the installation will make resolution. Similar coordination will be performed for USAR personnel.

e. If ATRRS is non-operational, manual processing will not result in the forfeiture of any of the above mentioned efforts. The reclassification process should be accomplished within 5 working days.

f. In the event another training opportunity is not offered or available, the commander with separation authority will counsel the soldier and consider separation actions IAW AR 635-200, chapter 2, section II.

TR 350-18, para 3-17.
3-17. SMDR process.
a. The SMDR is an annual individual training requirement determination and confirmation process chaired by HQDA (Deputy Chief of Staff for Operations and Plans (DCSOPS) and DCSPER). The SMDR will be conducted on a by-course basis. Courses taught at the proponent schools will be presented first followed by that proponent's courses taught in TASS Regions A through G, and OCONUS and RC3 courses. The Army training requirements for a given fiscal year are compared against the training capability of the concerned TASS battalion/training center/institution. The SMDR process will cover all directed education/training to include residence and distance learning.

(1) Proponents should be prepared to recommend where, within the TASS institutions, additional training can be conducted if it cannot be accommodated in the active component resident school. Army must fully utilize the entire existing TASS training base capacity for constrained courses. If active component schools within the TASS are unable to accommodate projected load, they must recommend alternative solutions. Part of the analysis should include the reserve institutions as a means to train the active component school untrainable load. Proponents will identify the course to be trained. The TASS institution will determine the number of iterations.

(2) The ATRRS summary sheet is the primary working document. It records the training requirements and variable course data required to develop the ARPRINT.

(3) Resources for courses that are transferred from one school to another will be moved effectively within the execution year.

b. Responsibilities. The TASS battalions/training centers/institutions will—

(1) Identify and resolve major training capability discrepancies prior to the SMDR. TASS RC institutions will resolve major training capability discrepancies with their Division (IT)/State Headquarters, TIE, and USARC/NGB.

(2) Provide school representatives throughout the TCC process who represent and speak for their commander concerning bottom-line training capability and resource requirements.

(3) Coordinate with the proponent school and identify constraints to training and excess capacity prior to the SMDR. Attempt to resolve any issues from the TCC with the proponent school, NGB, and USARC and identify, through the proponent school, any unresolved issues to HQ TRADOC, TOMA for elevation to CoC/GOIPR.

(4) Resolve all issues pertaining to training requirements; new or revised courses; course length changes; changes to maximum, optimum and minimum class sizes; instructor contact hours (ICH), instructor student ratio (ISR), and training hours.

(5) Identify all issues pertaining to training requirements; new or revised courses; course length changes; changes to maximum, optimum and minimum class sizes; ICH, ISR, and training hours to the proponent school prior to the SMDR so changes can be made in ATRRS.

(6) Provide course annual maximum capacity for update of C9 (fiscal-year-specific course administrative data) display. TASS RC/institutions provide same data at the RTCC. All courses will have school estimated maximum annual capacity. This information is required to permit ATRRS the ability to provide automated reports on those courses which are constrained and have CE, CF, or CZ entry, or those courses which are not actually constrained but are approaching or have a specific maximum capacity within the resources available. All other courses should reflect the upper limit the school can accommodate.

(7) Provide responses to all unresolved SMDR issues to proponent. Proponent will forward to HQ TRADOC, ATOM-P. Responses will provide solutions or actions initiated leading to the issue solution and will be prepared in fact sheet format. Each fact sheet will address a separate course (issue) and will be in sufficient detail to pro” document to justify that issue.

TR 350-18, para 3-18.

3-18. Army Training Requirements and Resources System (ATRRS).

a. Introduction. ATRRS is a DA personnel input to the Training Management Information System. It is an on-line system that integrates manpower requirements for individual training with the process by which the training base is resourced and training programs executed. ATRRS is a critical automation system tool that directly supports the SMDR process. The system generates the ARPRINT which is the mission and resourcing document for the Army’s training base. ATRRS provides the tool that permits personnel, resource and training managers (representing Army staff, field agencies, and training MACOM), to size the training base, schedule and reserve training seats to maintain personnel readiness.

b. AR 350-10 is the governing regulation for ATRRS.

c. The help desk numbers for ATRRS are DSN 225-2353/2060, or (703) 695-2353/2060. - 10

d. Memorandum HQDA,ODCSOPS<DAMO-TR, 1 Feb 1993, Subject: IndividualTraining Management.

TR 350-18, para 3-23.

3-23. Student orientation. All TASS training commanders will post their student orientation information under their respective school codes to the school header (SH) screen in ATRRS. Information will be current at all times. Units and students may access the student orientation material on the ATRRS homepage at: http://www.asmr.com/atrrscc/courses.asp. If ATRRS access is not available, student information will be mailed to the student's unit no later than (NLT) 45 days prior to course start date. Additional copies will be available for students who did not receive their orientation information. Information will include:

a. Course scope and prerequisites.

b. Billeting, mess, financial and support information.

c. Clothing, equipment, documents, other items required for course attendance and a listing of prohibited items.

d. Post and local community information including appropriate telephone numbers.

TR 350-18, para 3-28a, Student academic records.
a. The TASS battalion commander is responsible for ensuring all student input/output data is posted to ATRRS within 10 working days of course start date and completion date.

R 281050Z SEP 01
FM HDQA WASHINGTON DC//DAPE-ZA//
SUBJECT: ARMY TRAINING REQUIREMENTS AND RESOURCES SYSTEM (ATRRS) POSTING

1. REFERENCE: AR 350-10.

2. RECENT EVENTS AND FUTURE PLANNING REQUIRE ADJUSTMENT OF THE CURRENT DOCUMENTED 10 WORKING DAYS FOR POSTING OF INPUTS AND

GRADUATES/NON-SUCCESSFUL COMPLETIONS, DISCHARGES (ATTRITION) IN THE ARMY TRAINING REQUIREMENTS AND RESOURCES SYSTEM (ATRRS). THE NEW REQUIREMENT WILL REQUIRE SYSTEM POSTING WITHIN 2 WORKING DAYS AFTER THE SCHEDULED START DATE AND END DATE OF EACH CLASS OR ANY ATTRITE OR RECYCLE EVENT. THIS APPLIES TO ALL TRAINING COURSES.
PAGE 02 RUEADWD8075 UNCLAS
TAUGHT AT YOUR SCHOOLHOUSES AND ALSO APPLIES TO ALL ATTENDING THOSE COURSES TO INCLUDE ARMY ACTIVE, US ARMY RESERVE, ARMY NATIONAL GUARD, SISTER SERVICES PERSONNEL, INTERNATIONAL STUDENTS AND CIVILIANS.

3. THIS REQUIREMENT IS AN INTERIM CHANGE TO AR 350-10, PARA 1-4 P (2) AND WILL BE INCLUDED IN THE UPDATE TO THE REGULATION.

4. THE HQDA POC IS DR. MARIA WINSTON, DSN 221-4151 OR COM 703-325-4151. THE TRADOC POC IS MR. TOM PATRICK, DSN 680-2524 OR COM 757-788-2524.
BT
#8075

TR 350-10, para 2-4.

2-4. Student orientation. Commandants and/or TASS training commanders will post their student orientation information under their respective school codes to the school header (SH) screen in ATRRS. Information will be kept current at all times. Units and students may now access the student orientation material on the ATRRS homepage. (Note: DA Pam 351-4 is no longer current in many cases). If ATRRS access is not available, student information will be mailed to the student's unit no later than (NLT) 45 days prior to the course start date. Student orientation materials will be provided attendees in sufficient time to acquire materials and items required to bring to school when reporting for training. These materials should also be available on the school web site. Upon arrival, commandants will conduct a formal orientation with each class during in-processing. This orientation must include—

a. Course scope/overview and enrollment prerequisites.

b. An explanation of the student's course evaluation plan they will be issued.

c. Providing student orientation materials for students who did not receive their orientation materials prior to arrival.

d. Billeting, mess, financial, and support information.

e. Clothing, equipment, documents, and other items required for course attendance and a listing of prohibited items.

f. Installation and local community information including appropriate e-mail address and telephone numbers.

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Tab 27

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Standard 27 Reference Excerpts

TR 350-10, para 2-4.

2-4. Student orientation. Commandants and/or TASS training commanders will post their student orientation information under their respective school codes to the school header (SH) screen in ATRRS. Information will be kept current at all times. Units and students may now access the student orientation material on the ATRRS homepage. (Note: DA Pam 351-4 is no longer current in many cases). If ATRRS access is not available, student information will be mailed to the student's unit no later than (NLT) 45 days prior to the course start date. Student orientation materials will be provided attendees in sufficient time to acquire materials and items required to bring to school when reporting for training. These materials should also be available on the school web site. Upon arrival, commandants will conduct a formal orientation with each class during in-processing. This orientation must include—

a. Course scope/overview and enrollment prerequisites.

b. An explanation of the student's course evaluation plan they will be issued.

c. Providing student orientation materials for students who did not receive their orientation materials prior to arrival.

d. Billeting, mess, financial, and support information.

e. Clothing, equipment, documents, and other items required for course attendance and a listing of prohibited items.

f. Installation and local community information including appropriate e-mail address and telephone numbers.

TR 350-18, para 3-5a.

3-5. Institutional training. Conduct of institutional training.

a. Prerequisites for each course are published in DA Pams 351-4 and 611-21, course management plan, and ATRRS (http://www.asmr.com/atrrs). Student qualification in prerequisite tasks is the individual's and unit commander's responsibility.

b. Schools will present training as designed and approved by training/TD (task) proponent. This will ensure tasks are trained at the appropriate skill level and to the standards prescribed for each course.

c. Student training and instructors.

(1) School staffs, faculties, and ill supervise and support instructors and students and ensure commitment to training, educating, and developing each student. Ensure facilities are provided to accommodate after hours study requirements for students.

(2) Trained, qualified, and experienced instructors will conduct and supervise student training. Trainer-to-student ratios will be IAW POI/CMP requirements and will be sufficient to ensure student control, safety, and supervision, as well as to facilitate teaching, coaching, mentoring, and developing individual students.

(3) Instructors will provide students with progressive and sequential training, as designed and approved by the training/TD (task) proponent, accurate student performance measurements and tests, and timely feedback.

d. There will be occasions when TASS training battalions are requested to conduct training in courses for which TRADOC or the other proponents have not developed and distributed courseware. Within resource limitations, valid requirements should be supported. The requirement for TASS training battalions to conduct training only with proponent-approved courses remains in effect. Procedures for TASS training battalion development and proponent approval of such courseware are found in TRADOC Reg 350-70, part VI. The situation may arise, where a TASS training battalion is unable to conduct a course under their school code. If the training is essential to unit readiness, it may become necessary for another component to assume the mission. If this occurs, the following guidelines apply:

(1) The TASS battalion and its supporting command (TAG/DIV(IT)) responsible for the conduct of the course must grant permission for another component to conduct the course.

(2) Once approval has been granted, NGB or USARC, as appropriate, will load the course under the school code conducting the course, on a one-time basis.

(3) Although the owning TASS battalion is not conducting the course, it remains responsible to ensure instructors are certified and the course is conducted to standard.

TR 350-18, para 3-23, Student orientation.
All TASS training commanders will post their student orientation information under their respective school codes to the school header (SH) screen in ATRRS. Information will be current at all times. Units and students may access the student orientation material on the ATRRS homepage at: http://www.asmr.com/atrrscc/courses.asp. If ATRRS access is not available, student information will be mailed to the student's unit no later than (NLT) 45 days prior to course start date. Additional copies will be available for students who did not receive their orientation information. Information will include:

a. Course scope and prerequisites.

b. Billeting, mess, financial and support information.

c. Clothing, equipment, documents, other items required for course attendance and a listing of prohibited items.

d. Post and local community information including appropriate telephone numbers.

POI/Course management Plan.

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TR 350-70, paras II-8-4d&e.

I-8-4. TRAS Documents, Continued

CAD Description

d. The CAD—

Is	• Prepared for each formal course. • Used to prepare the preface page of a POI. Separate phases of a course must have separate CADs and preface pages.
Provides	• Critical planning information about a formal course which enables the recruiting, quota management, and personnel systems to take the actions needed to have students and instructors on-station in sufficient time to meet Army requirements. • New or revised Initial Entry Training (IET) course descriptions and prerequisites to the U.S. Army Recruiting Command (USAREC). • Course information needed to update DA Pam 351-4.
Establishes	• Basis for solicitation of individual training requirements (student input) through the Total Army Centralized Individual Training Solicitation (TACITS) for new and revised courses for use during the SMDR and the development of the Army Program for Individual Training (ARPRINT). • Estimated course data elements (OCS, ICH, etc.) used to determine instructor requirements during the SMDR. • Revision to a course file in the ATRRS data base.

POI Description

e. The POI—

Is	A POI covers a course/phase. It is a requirements document that provides a general description of course content, duration of instruction, and methods and techniques of instruction; and it lists resources required to conduct peacetime and mobilization training.
Lists	Critical tasks and supporting skills and knowledge taught, including distance learning phases of the course.
Addresses	Both peacetime and mobilization training programs, if applicable. The mobilization portion of a POI is termed a Mobilization POI (MOB POI).

TR 350-10, para 5-11.

5-11. NCOA staffing and organization.

a. The NCOA commandant is a CSM who works under the supervision of a MACOM, installation, or division commander and that commander's CSM.

b. Staffing of NCOA is governed by the Manpower Staffing Standards System (MS3). Noncommissioned Officer Academy manpower is identified by management decision package "TSGT."

c. Commandants will attach and/or assign to the NCOA sufficient numbers of full-time SGLs, by MOS mix, and SSGLs, by CMF mix, required to train their programmed NCOES annual, by course, student loads.

(1) The SGL assigned to conduct each course/class will mentor and evaluate their students from day one through course graduation and complete separate DA Form

1059s on each student enrolled at the end of both common core and MOS technical training. It is the TRADOC Commander's intent that except where prohibited due to safety concerns/constraints, the assigned or attached SGL should teach, coach, mentor, counsel and evaluate their students to the maximum extent possible during the conduct of all NCOES courses.

(2) The SGL MOS will be immaterial for the conduct of Phase I stand-alone ANCOC/BNCOC Common Core. However, for quality mentoring purposes, it is desired that a like CMF/MOS SGL be used to train soldiers who receive Phase I and II of their ANCOC or BNCOC congruently at their MOS proponent NCOA/school.

(3) Proponent NCOES students will not be administratively handed off, released, or turned over to the school's technical training departments at the end of Phase I ANCOC or BNCOC. While the proponent school's technical training departments may be responsible for delivering the MOS-specific curriculum, the NCOA commandant will remain responsible for each student's status. An assigned or attached academy SGL will remain in control of all NCOES attendees until they graduate or are otherwise disenrolled.

(4) Soldiers arriving at proponent schools for Phase II only (having already completed Phase I at another location), will be assigned to an academy like MOS SGL and join a like-MOS group for completion of their technical training.

(5) At ANCOC/BNCOC, no honors certificates or diplomas (other than the DA Form 1059) will be issued until the entire level of training or course (Phase II technical MOS phase/phases of the course) is completed.

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TR 350--70
I-2-3. Safety in Training Development/Training

Description a. The training development process fixes responsibility, institutionalizes operational safety, and leads to decision making at the command level appropriate to the risk. Safe training provides ---

(1) Fewer injuries and deaths.
(2) Reduced lost time.
(3) Lower costs (facility, training, and equipment repairs and replacement).

Outputs *b. Minimum essential requirement:* Safety hazards, cautions, etc., are identified and integrated in appropriate products.

Safety Consider-ations c. Safety must be considered in every phase of the training development process. The training developer will accomplish the actions listed during each TD phase.

TD Phase	Major Activities
(1) Analysis	Identify and document safety factors, hazards, and precautions during task analysis.
(2) Design	(a) Integrate safety considerations into the design of all training. (b) Include proper/appropriate safety/caution statement considerations into the training design and follow-on programs, products, and materials. © Assess probability of eliminating risk factors while maintaining viable training. (d) Coordinate/Resolve training safety issues with branch safety manager.
(3) Develop-ment	(a) Include safety in all training products and materials. (b) Coordinate with/Obtain approval of branch safety manager on all lesson plans and other training products that have safety issues.
(4) Implemen-tation	(a) Ensure staff, faculty, and students adhere to intent of safety procedures and practice safe training operations and training. (b) Ensure staff enforces student compliance with safety rules, regulations, and procedures.
(5) Evaluation	(a) Ensure safety considerations are integrated and complied with throughout the TD and training processes. (b) Provide safety feedback to the training developers.

I-2-4. Risk Management

Description a. Risk management as it applies to training development is ---
(1) The process used to identify task and training risks, set values on risk elements, compare risks against training benefits, and eliminate unnecessary risks.
(2) An expression of potential loss in terms of hazard severity, probability, risk level.
(3) Tightly tied to force protection.
(4) A useful tool to help make decisions about hazards causing the risks.

Outputs *b. Minimum essential requirement:* Risk assessment codes assigned to appropriate products.

Start Point c. Training developers and trainers must implement the risk management process during the training development process.

TD Phase	Major Activities
(1) Analysis	*During task analysis, include a performance step to conduct a risk assessment (as appropriate).*
(2) Design	*(a) Integrate safety considerations into the design of all training.* *(b) Identify and include proper/appropriate risk assessment code in the training design and each follow-on lesson plan, program, product, or material. Note: See Risk Assessment Matrix (this chapter).* *(c) Coordinate and resolve task and training risk assessment issues with the Branch Safety Manager.*
(3) Development	*Include the training risk assessment code in all lessons.*
(4) Implementation	*(a) Ensure staff, faculty, and students adhere to intent of risk management.* *(b) At a minimum, perform a risk assessment before any non-classroom training or training using equipment.*
(5)Evaluation	*Ensure risk assessments are conducted and risk levels assigned and included in the appropriate lesson plans, programs, products, and materials.*

Procedure d. Risk management is a five-step cyclic process as follows:

Step	Action
(1) Identify hazards	*(a) Identify all conceivable hazards prior to the operation.* *(b) Identify all conceivable hazards associated with performing a task or learning objective.*
(2) Assess hazards	*(a) Determine the impact of hazards on the training.* *(b) Determine the probability of a hazard causing a problem and the severity of the consequences should such a problem occur.* *Note: Output of this step is a risk assessment describing the impact of the combined hazards. Use Risk Assessment Matrix (this chapter).*
(3) Develop controls and make a risk decision	*(a) Develop control measures that eliminate the hazard or reduce its risk.* *(b) As control measures are developed, re-evaluate until all risks are reduced to a level where benefits outweigh potential costs.* *(c) Make risk decisions at the level of command that corresponds to the degree of risk. Command guidance establishes who makes which decisions.* *(d) Assign a risk assessment level to each lesson.*
(4) Implement the controls	*Note: These are the controls developed and established as a result of the previous steps. Included in this step is leader action to reduce or eliminate hazards.*
(5) Supervise and evaluate	*Follow up during and after the After-Action Review (AAR) to ensure that all went according to plan, reevaluate the training or make adjustments as required to accommodate unforeseen issues, and incorporate lessons learned.*

Risk Assessment Matrix

e. Assign a risk assessment level to each lesson using the following Risk Assessment Matrix, extracted from FM 100-14, Risk Management. The training developer will complete the "Probability of Occurrence" columns as appropriate.

Note 1: Controls imposed should normally bring risk down to a medium or low rating.

Note 2 The Branch Safety Manager or designated representative will review all lesson plans and mediate risk assessment level/code if necessary.

Severity Potential of an Injury/Damage if It Occurred	Probability Of Occurrence				
LEVEL OF RISK: **E = EXTREMELY HIGH** **H = HIGH** **M = MODERATE** **L = LOW** **USE COMMON SENSE WHEN DETERMINING RATINGS!**	**FREQUENT**	**LIKELY**	**OCCASIONAL**	**SELDOM**	**UNLIKELY**
Severity Potential of an Injury/Damage if It Occurred	**Probability Of Occurrence**				
CATASTROPHIC: • Death or permanent total disability, system loss, major property damage. • Loss of ability to accomplish assigned mission.	**E**	**E**	**H**	**H**	**M**
CRITICAL: • Severe injury, permanent partial disability, temporary total disability in excess of three months, major system damage, or significant property damage. • Significantly degrades mission capabilities in terms of required mission standards.	**E**	**H**	**H**	**M**	**L**
MARGINAL: • Minor injury, lost workday accident, compensable injury/illness, minor system damage, or minor property damage. • Degrades mission capabilities in terms of required mission standards.	**H**	**M**	**M**	**L**	**L**
NEGLIGIBLE: • First aid or minor supportive medical treatment, minor system impairment. • Little or no impact on mission accomplishment.	**M**	**L**	**L**	**L**	**L**

Risk Code Approvals

f. Submit ratings for approval as follows:

Note 1: A residual risk cannot be "high" or "extremely high" without the appropriate command approval.

Note 2: Disagreements among the raters concerning risk assessment level assignment may be documented and submitted with the ratings to the approving authority.

Continued on next page

I-2-4. Risk Management, Continued

Risk Code Approvals (continued)

<table>
<tr><th>If the risk assessment is---</th><th>Then associated risk for the lesson must be approved by the ---</th></tr>
<tr><td>Extremely high</td><td>CDR TRADOC
<table><tr><td>Training Proponent Should ...</td><td>• Send requests to --- HQ TRADOC, ATTN: ATBO-SO Fort Monroe, VA 23651
• Include supporting documentation and rationale.
• Include Commander's/Commandant's position on risk acceptability.
• Have correspondence signed by the Commander or Commandant.</td></tr></table></td></tr>
<tr><td>High</td><td>Training/Task (TD) Proponent Commander/Commandant</td></tr>
<tr><td>Moderate</td><td rowspan="2">Training/Task (TD) Proponent Commander/Commandant may delegate approval authority for “Medium” and “Low” level risks.</td></tr>
<tr><td>Low</td></tr>
</table>

Completion g. Risk management is never complete. It is a continuing cycle that requires everyone to be constantly alert to training risks and take immediate action to reduce their severity or to eliminate them.

Quality Control h. For quality results from risk management, all personnel involved must ensure ---
(1) All hazards associated with the training of the tasks and learning objectives are identified.
(2) Risk assessment has been conducted on all lessons.
(3) The appropriate risk assessment code has been assigned to all lessons.
(4) Staff, faculty, and students adhere to intent of risk management.

TR 350-6, para 2-14, Risk management.
Commanders and trainers of IET soldiers will utilize the principles and procedures established in FM 100-14, Risk Management. Commanders will ensure cadre receive risk management training prior to their assuming sole control over the IET soldier. The risk management process assists commanders in making informed, conscious

decisions on eliminating unnecessary risks and in accepting residual risks inherent in accomplishing the mission.

TR 350-18, para 3-4, Risk assessment/risk management. Reference TRADOC Regs 351-10 (para 2-18), 350-70, and 385-2 (paras 4-3 and 6-3), and FM 100-14.

TR 350-10, para 2-17.

2-17. Risk management (RM).

a. In accordance with FM 100-14, RM is a five-step process integrated into training decisionmaking to identify and eliminate unnecessary risk by—

(1) Identifying potential hazards that may be encountered during mission or task performance.

(2) Assessing hazards.

(3) Making decisions and developing controls.

(4) Implementing appropriate controls to reduce or eliminate hazards.

(5) Supervising mission/task performance to include evaluating performance to adjust as needed and incorporating lessons learned into future actions.

b. Commandants will—

(1) Adhere to TRADOC risk assessment decision authority levels in all training operations, per TRADOC 385-2, paragraph 4-4.

(2) Establish course safety standards and integrate safety/caution statements, RM decisions, and fratricide prevention actions into appropriate training documents.

(3) Ensure leader course graduates possess the skills and knowledge to conduct high-risk training and operations safely and successfully. Risk management must be integrated throughout all training in such a way as to provide realistic, mission-oriented applications. To achieve the desired endstate, RM must be reinforced, practiced, and individual students evaluated. This will occur through practical hands-on application during the training of common core and branch tasks taught under operational conditions.

(4) Include RM and fratricide prevention in course tests.

c. Safety standards. Leader safety training will include progressive and sequential RM and fratricide prevention training.

TR 350-10, para 2-18.

2-18. Safety and force protection.

a. Force protection must be an integral part of mission planning by including RM in the decisionmaking process. Risk management eliminates unnecessary risk to the force and the mission, minimizes fratricide, and avoids accidental injury to soldiers and damage to equipment. Force protection responsibilities continue around the clock, both on and off duty.

b. Safety in training and training safely are not synonymous. Safe training is achieved by integrating safety in the planning, development, and conduct of training per FMs 25-100 and 25-101. Leaders must commit to accomplishing missions without unnecessarily jeopardizing lives and equipment. They must recognize unsafe behavior while making prudent risk decisions and developing operational processes to minimize hazards.

c. Training safety consists of three interlocking tiers.

(1) Tier 1: Commander validates soundness of training and evaluates plans for safety and resolving safety issues.

(2) Tier 2: First line leader identifies necessary actions by responsible individuals, establishes a system to monitor training safety, and focuses on adherence to standards.

(3) Tier 3: Individual ensures soldiers look after themselves and others and know how to recognize unsafe conditions and acts.

TR 350-10, para 2-19.

2-19. Environmental protection and stewardship.

a. Leaders are the Army's environmental stewards. They have a professional and personal responsibility to—

(1) Understand and support the environmental program.

(2) Integrate into every mission the Army's vision to be a national leader in environmental and natural resource stewardship for present and future generations.

b. Leaders use the same five-step process defined in paragraph 2-17, above, to identify, eliminate, or reduce environmental risks whenever possible. Detailed procedures are contained in TC 3-34.489, and FM 3-100.4.

Tab 30

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TR 350-70
III-4-7. After Action Review (AAR) Performance Checklist

AAR Performance Checklist To achieve a satisfactory rating, the instructor conducting the AAR must receive a "GO" rating for ALL Instructor Actions.

Instructor Action	GO	NO-GO
1. AAR outline. Developed content outline.		
2. Training Area preparation. Prepared appropriate room or training area.		
3. Introduction ("a" through "c" required for "GO" rating). Stated --- a. AAR purpose. b. Training objective. c. Ground rules.		
4. Presentation ("a" through "c" required for "GO" rating). Presented chronological list of training events and facilitated student discussion of each event, to include the following --- a. What they observed. b. What went right (i.e., what was successful). c. What could/should be done differently.		
5. Facilitation ("a" through "d" required for "GO" rating): a. Asked questions which involved students and led them to clarify points. b. Listed points discussed for all to see. c. Summarized AAR highlights. d. Kept students focused on AAR activities and purpose.		

TR 350-70
VI-7-2d (3)

(3) Commanders/ Commandants, Training/TD (Task) Proponents	*(e) Include time in resident training to review the test with students.*

TR 350-6, para 2-15.
After Action Reviews (AARs) and sensing sessions.

a. Initial Entry Training commanders will establish a program for the conduct of AARs and sensing sessions for each training cycle (or class in AIT). The AARs are for cadre, and the sensing sessions are for IET soldiers. The purpose is to provide all levels of command an assessment of the training program, to include the strengths and weaknesses of the organization.

b. After Action Reviews will:

(1) At a minimum, be conducted at company and battalion level.

(2) For BCT/OSUT, company level AARs will be held at the end of each phase. Battalion level AARs will be held at the end of each cycle.

(3) For AIT, the senior IET commander will determine the appropriate intervals for conduct of AARs.

(4) The focus of the AARs must be on the quality of the training program, not on company averages or other numerical comparisons.

c. The commander will conduct the AARs and will review, as a minimum, performance in the following areas:

(1) Phase goals and objectives.
(2) Quality of values training.
(3) Quality of teamwork development effort.
(4) Basic rifle marksmanship program.
(5) Individual tactical training periods.
(6) Physical fitness training program.
(7) Field training exercise.
(8) Phase Testing.
(9) Discharges and restarts by type.
(10) Stress identification and management.
(11) Management of the heat/cold injury prevention program.
(12) Training injuries, safety program, and risk management.
(13) Treatment of soldiers by cadre.
(14) Quality of committee group instruction.
(15) Quality of facilities used by soldiers.
(16) Conduct of reinforcement training.
(17) Unit equal opportunity and prevention of sexual harassment programs.
(18) Integration and reception.
(19) Nuclear, biological, and chemical training.

d. Sensing sessions with IET soldiers are an effective means for assessing command climate and provide leadership a forum for identifying and resolving problems.

(1) At a minimum, sensing sessions will be conducted at the company and battalion level.

(2) Sensing sessions will be held at mid-course and at the end of each cycle.

FM 25-101, Ch 3.

CHAPTER 3
PLANNING

> ***Training in all its phases must be intensive . . . It must be intelligently directed so that every individual [soldier] including the last private in the ranks, can understand the reasons for the exertions he is called upon to make.***
>
> General Dwight D. Eisenhower

This chapter addresses how leaders plan training based upon the assessment. Figure 3-1 expands the training planning process illustrated in the training management cycle. The phases will be discussed in detail as follows:

- ***Long-range planning, which results in the battalion commander's long range calendar.***
- ***Short-range planning, which results in the battalion commander's--***

  --Quarterly training guidance (AC) or yearly training guidance (RC).
  --Quarterly training calendar (AC) or yearly training calendar (RC).
  --Quarterly training briefing (AC) or yearly training briefing (RC).
  --Near-term planning which results in publication of weekly (AC) or monthly (RC) training schedules.

Figure 3-1. Training planning process.

Planning links the unit METL and the execution of battle focused training. It is a centralized process that aligns training priorities with wartime requirements at all levels within the unit. Although there are other training requirements, battle focus allows the leader to narrow his scope of planning to wartime mission essential tasks.

ASSESSMENT

The assessment begins the training planning process. Commanders use their subordinates, key staff members, and NCO leaders to assess the training level on mission essential tasks. Commanders rely on subordinate leaders' feedback to determine their units' training proficiency level. They analyze all available training evaluations, such as ARTEP external evaluations, combat training centers (CTC) take home packages, and annual training reports. Commanders use these evaluations, personal observation, and other feedback to identify the subtasks for each mission essential task which require further training.

In-depth assessment determines a strategy to improve training proficiency on specific weaknesses and plan sustainment training on demonstrated strengths. Assessment links the evaluation of training executed to the planning of upcoming training.

LONG-RANGE PLANNING

At battalion level, long-range planning starts with unit assessment and is the basis for the long range training calendar. Resources, such as major training areas, ammunition, and fuel, are allocated and shortfalls, identified. The long-range plan synchronizes supporting units and agencies so that training events can be properly executed (Figure 3-2).

UNIT ASSESSMENT

Long-range planning is based on unit assessment. This assessment identifies training strengths and weaknesses, allowing the commander to plan training which sustains unit strengths and improves weaknesses.

Unit assessment is made by the commander. It is based on his firsthand observations and input from all leaders (officer and NCO). It is the base upon which a training strategy is developed. Unit assessment is--

- Developed using evaluations, reports, leader books, or records.
- A continuous process; however, formal assessment is normally only conducted at the start of planning phases and after major training events.
- Used to set or update unit goals and objectives.
- Influenced by future events; for example, personnel turnover, new equipment fielding, or force structure changes.

Training strategy is a concept used to attain desired levels of training proficiency on mission essential tasks. The commander's strategy is based on his assessment of his unit and higher headquarters' command training guidance (CTG). It determines training events and activities to improve or sustain proficiency on each mission essential task. This training strategy supports unit goals and objectives that provide a common direction for the unit's training program.

Figure 3-2.

The commander's training strategy is continuously refined throughout the planning process. Training strategies--

- Ensure training is focused on METL and subordinate leader development.
- Ensure combined arms is incorporated in all training.
- Determine who, what, when, and where to train.
- Determine the logical sequence to execute the training.

- Determine types of training exercises to be used (see Appendix C). For example, commanders with an inexperienced battle staff plan more map exercises (MAPEXs), fire coordination exercises (FCXs), and command post exercises (CPXs). The command field exercise (CFX) is excellent for training leaders and staffs with complete command, control, communications, and logistical systems.

- Determine frequencies for a given task; for example, train Movement to Contact quarterly during FTXs and Set Up the Tactical Operations Center (TOC) once a month.

- Coordinate all training events. CS and CSS commanders must consider unlike units and physical dispersion.

- Match the available resources to the training requirements.

- Result in commander's training guidance.

These elements of training strategy apply to both Active and Reserve Component units. The RC, in many instances, is required to conduct additional coordination between their wartime and peacetime chains of command. For example, a transportation battalion and an airborne MI company may report through a support group to a US Army Reserve Command (ARCOM) headquarters in peacetime. Yet they are aligned with two different wartime chains of command.
With limited time to train, RC commanders must sequence training of METL tasks throughout the long-range training cycle. Appendix C discusses training exercises that maximize planning time.

COMMANDER'S GUIDANCE

Senior commanders publish long-range planning calendars and CTG to give battalion and subordinate commanders adequate time to properly plan training (Figures 3-3 and 3-4). Senior commanders provide resources and protect training from distracters.
Figure 3-3. Active Component.
Figure 3-4. Reserve Component.
Division commanders often provide suggested frequency for training events and other activities. Figure 3-5 is an example of an AC division commander's guidance matrix. It can be used as a tool to conduct long-range planning. RC commanders could develop a similar matrix based on training requirements and higher headquarters requirements.
Figure 3-5.
Weekly NCO training time is included on the example matrix. Some training time during the week should be devoted to the small-unit leader (such as a squad leader or a vehicle commander) to train his unit. This enhances readiness and cohesion; it also allows the junior NCO to learn and exercise the Army's training management system at the lowest level. *The key is to train the trainer so that he can train his soldiers.* This requires the NCO to identify essential soldier and small-unit and team tasks (drills) that support unit METL and then--

- To assess strengths and weaknesses.
- To formulate a plan to correct deficiencies and sustain strengths.
- To execute the training to standard.

TIME MANAGEMENT

Commanders organize training time during long-range planning using time management systems. Time management systems are designed to protect training time for subordinate units. Various types of time management systems are used throughout the Army. Some systems consist of three cycles: units involved in prime time training, units on alert status, and units providing support. Other systems have two cycles: prime time training, and support. The two-cycle system is better suited for the majority of CS and CSS units. *Slice units' time management systems should be aligned with the supported maneuver unit.* Regardless of the system, its purpose is to provide uninterrupted training time to subordinate commanders.

Taskers from higher headquarters or the installation are managed to protect units in a training cycle. Units being fenced from outside support taskings thus have the time to train collective tasks and to conduct internally directed training exercises. After a period of time, determined by the commander, units that have been fenced from support taskers become the supporting units; units that have been receiving the support taskings are provided uninterrupted time to train.

Time management is especially important in the RC. RC commanders use a time management system to ensure the maximum amount of time is devoted to training essential soldier, leader, and collective tasks. The peacetime chain of command must assist subordinate commanders by consolidating scheduled training distracters, such as human immunodeficiency virus (HIV) testing, panographic x-rays, or inspections, during one or two IDT periods during the year. This impacts least on training.

One way to implement a time management system during IDT is to schedule activities in two- or four-hour blocks concurrently or sequentially on one day. Each squad or platoon is scheduled during a block to accomplish the requirement. The remainder of the unit is conducting training on mission-oriented tasks. RC commanders should provide higher headquarters preferred annual dates to conduct externally directed administrative requirements to minimize impact upon training.

Commanders at all levels can use time management systems. A battalion commander whose unit is in the support period can still provide training time for subordinates. He may direct that during the first week of the support period, Charlie Company will not receive support taskers until Alpha and Bravo Companies have been tasked to the limit of their support capability. During the next week, Bravo Company is the last company to be tasked. The last company to be tasked for support normally will have some time when the other companies are handling all taskers. This provides an opportunity to train soldier and small-unit collective tasks although the battalion is in a support cycle. By managing in this manner, the commander has developed and implemented a time management system. Figure 3-6 lists the characteristics of a three-cycle system known as Green-Amber-Red.

There are training opportunities during every period of the time management system. Specific periods lend themselves to certain types of events. The following shows training events conducted during the Green-Amber-Red time management system:

- Post support--red.
- Gunnery--green.
- FTX--green.
- Holiday half-day--red.
- Weapons qualification--amber.
- Combined arms live fire exercise (CALFEX)--green.
- National training center (NTC)--green.

Figure 3-6. Green-Amber-Red Time Management System.

PLANNING CALENDARS

Battalion commanders publish their long range guidance in the form of long-range planning calendars. They follow the timeliness in Figures 3-3 and 3-4. Although written training guidance is not required, it may be used to emphasize key training events or higher headquarters' training guidance. Subordinate leaders provide input to the battalion long-range planning calendar.

The battalion long-range planning calendar is a graphic depiction of upcoming training. It provides direction and coordinates resource requirements. Supporting and supported units should exchange planning calendars to enhance coordination.

The Standard Army Training System (SATS) is designed to assist in formatting and producing planning calendars. The following four steps are suggested for preparing the long-range planning calendar. The example depicts only the second quarter of the long-range planning calendar. AC and RC units should modify the four steps to fit the needs of the command. RC units must post AT and IDT dates first.

Step 1. *Post the time management system.* Posting the time management system first highlights prime-time training periods available to the unit, and support periods. Commanders then focus their resource and exercise planning to take advantage of prime-time training.

NOTE: Holiday periods to include host nation holidays must be posted.

Step 2. *Post required training events on the calendar.* These are requirements that are directed by higher headquarters. These events provide excellent training opportunities for the battalion commander and subordinate leaders. They must take full advantage of these events to select training objectives to be accomplished. The dates of these events should be annotated. If exact dates are unknown, block window periods. Examples of required training events are--

- MAPEX, TEWT, CPX, CFX, FCX, and FTX.
- CTC training rotations.
- External evaluations.
- Gunnery periods.
- Security reaction force duty.
- Reserve Officers' Training Corps (ROTC) support.
- OPFOR support and training.
- RC support (for AC units).

Step 3. *Schedule other requirements.* Identify other requirements that impact on training. Reduce training distracters by properly identifying required events early in the planning process. Some examples are--

- Announced inspections, such as technical validation inspections (TVIs), nuclear surety inspections (NSIs), and command inspection program (CIP) inspections.
- New equipment fielding to include new equipment training (NET).
- Community and installation support events; for example, parades and displays.
- Directed administrative requirements (RC), such as panographic x-rays and HIV screening.

Step 4. *Schedule unit-controlled exercises and other training.* On the basis of his strategy, the commander schedules events which will improve or sustain METL proficiency in conjunction with higher headquarters' directed training requirements. For example, the battalion commander could schedule a TEWT, a CPX, an FCX, and STXs prior to a brigade FTX.

The long-range planning calendar is staffed with outside agencies that can impact on training. It is coordinated with subordinate and higher commanders, installation commanders, and supporting slice units.

This ensures that supporting slice units and activities are prepared to support the battalion's training plan. Timely coordination will assist in the training integration of the battalion slice.

SHORT-RANGE PLANNING

Short-range planning refines the long-range calendar (Figure 3-7) . It defines in greater detail the broad guidance on training events and other activities in the long-range planning calendar and CTG (see Appendix A). It begins with the commander's training assessment and results in--

- Quarterly training guidance (QTG) for AC and yearly training guidance (YTG) for RC.

- Quarterly training calendar (QTC) for AC and yearly training calendar (YTC) for RC.

- Quarterly training briefing (QTB) for AC and yearly training briefing (YTB) for RC.

TRAINING ASSESSMENT

Short-range planning is based on the long range unit assessment and on a detailed training assessment of the unit's current METL proficiency. It focuses on training deficiencies which impact on the unit's ability to perform its wartime mission. A training assessment is--

- Required for each METL task, platoon and squad collective task, soldier task, and, at battalion and higher headquarters, each battle task.

- A snapshot of the unit's current soldier, leader, and collective task proficiency.

- A comparison of task proficiency with *Army* standards.

- Based on a review of training evaluations; for example, annual training evaluations, CTC take-home packages, and CTC lessons learned (Appendix D).

- Used to determine QTG or YTG.

Step 1. *Post the time management system.* Posting the time management system first highlights prime-time training periods available to the unit, and support periods. Commanders then focus their resource and exercise planning to take advantage of prime time training.

NOTE: Holiday periods to include host nation holidays must be posted.

Figure 3-34. Step 1.

Step 2. *Post required training events on the calendar.* These are requirements that are directed by higher headquarters. These events provide excellent training opportunities for the battalion commander and subordinate leaders. They must take full advantage of these events to select training objectives to be accomplished. The dates of these events should be annotated. If exact dates are unknown, block window periods.

- MAPEX, TEWT, CPX, CFX, FCX, and FTX.
- CTC training rotations.
- External evaluations.
- Gunnery periods.
- Security reaction force duty.
- Reserve Officers' Training Corps (ROTC) support.
- OPFOR support and training.
- RC support (for AC units).

Figure 3-35. Step 2.
Step 3. *Schedule other requirements.* Identify other requirements that impact on training. Reduce training distracters by properly identifying required events early in the planning process. Some examples are--

- Announced inspections, such as technical validation inspections (TVIs), nuclear surety inspections (NSIs), and command inspection program (CIP) inspections.
- New equipment fielding to include new equipment training (NET).
- Community and installation support events; for example, parades and displays.
- Directed administrative requirements (RC), such as panographic x-rays and HIV screening.

Figure 3-36.
Step 4. *Schedule unit-controlled exercises and other training.* On the basis of his strategy, the commander schedules events which will improve or sustain METL proficiency in conjunction with higher headquarters' directed-training requirements. For example, the battalion commander could schedule a TEWT, a CPX, and FCX, and STXs prior to a brigade FTX.
The long-range planning calendar is staffed with outside agencies that can impact on training. It is coordinated with subordinate and higher commanders, installation commanders, and supporting slice units.
This ensures that supporting slice units and activities are prepared to support the battalion's training plan. Timely coordination will assist in the training integration of the battalion slice.
Figure 3-37. Step 4.
Figure 3-7.
The CSM, 1SGs, PSGs, squad leaders, and other key NCOs provide input on section, squad, crew, and soldier proficiency on essential soldier tasks for the commander's assessment. Likewise, all leaders provide input to the commander's assessment of leader proficiency. They provide planning recommendations on integrating selected essential leader and soldier tasks into collective mission essential tasks.
NCOs may use a leader book (discussed in Appendix B) and battle rosters to assess section, squad, crew and soldier tasks. Battle rosters provide a way to record key systems crew data. Figures 3-8 , 3-9, 3-10, and 3-11 illustrate sample formats that may be used. Specific information and format for battle rosters depend on the unit's mission requirements. Battle rosters--

- May be maintained formally or informally.
- Are maintained at battalion level and below.

- Track key weapon and support systems, such as tanks, attack helicopters, howitzers, radars, trucks, and tube launched, optically tracked, wire-guided (TOW) missiles.

- Track crew data; for example, stability, manning levels, and qualification status.

- Designate qualified back-up crew members.

- Identify soldiers to enable them to train as a designated crew.

The commander's assessment of training proficiency on METL tasks is rated as either "T" (trained), "P" (needs practice), or "U" (untrained):

- *"T" (trained)* means that the unit can successfully perform the task to standard. Only sustainment training is needed. The leader judges task performance to be free of significant shortcomings. Practice on "T" tasks is designed to keep soldiers from losing proficiency.

- *"P" (needs practice)* means that the unit can perform the task with some shortcomings. The shortcomings are not severe enough to require complete retraining. Only refresher training is required.

- *"U" (untrained)* means that the unit cannot perform the task to standard. The leader prepares a comprehensive strategy to train all supporting tasks not executed to standard.

Figure 3-8. Combat arms battle roster.
Figure 3-9. Continued.
Figure 3-10. Continued 2.
Figure 3-11. Continued 3.
Commanders may use SATS (when available) or locally developed worksheets to record their training assessment. One method is to use the BOS as a guide. Those BOS that do not apply to the task would be left blank on the worksheet. (Sample extracts for Task Force 1-77 and Team A are at Figures 3-12 and 3-13. Extracts for the 52d Engineer Battalion and the 1st Forward Support Battalion are at Figures 3-14 and 3-15).
Figure 3-12. Extract from TF 1-77 commander's training assessment.
Figure 3-13. Extract from Team A.
Figure 3-14. Extract from 52d Engineer.
Figure 3-15. Extract from 1st FSB commander's training assessment.
Figure 3-16. Extract Commanders Assessment by subunit of METL task Defend.
Figure 3-16 is a sample of the commander's assessment by subordinate units of the mission essential task Defend. The TF 1-77 commander assessed it as "P" in Figure 3-12 using the BOS. Battle tasks or supporting tasks are recorded down the left side; subunit assessment, across the top; and specific deficiencies, in the right column. This in-depth commander's assessment recognizes that a deficiency in one company may not be a deficiency in another company. It allows the commander to tailor his

training to specific subordinate unit weaknesses and develop an effective training plan to correct them.

RISK ASSESSMENT

Risk assessment is the thought process of making operations safer without compromising the mission. Commanders must continuously perform a risk assessment of conditions under which training is conducted to prevent the unnecessary loss of soldiers and equipment. The degree of risk varies with the conditions at the time of training. For example, have the soldiers done the training before? Will the training be done for the first time at night? Are the soldiers fatigued? In reality, risk management is smart decision making.

Training must be tough, realistic, and safe. Commanders must consider the following points as they integrate risk assessment into their training:

- Accept no unnecessary risks.
- Make risk decisions at the proper level.
- Accept risks if mission benefits outweigh the costs.

It is important to remember that the commander is the safety officer, but *all soldiers and leaders are responsible for safe training.* All leaders must--

- Identify the risks using METT-T factors.
- Assess possible loss, cost, and probability.
- Make decisions and develop controls to reduce risks.
- Implement controls by integrating them into plans, orders, SOPs, training performance standards, and rehearsals.
- Supervise and enforce at all times safety controls and standards.

COMMANDER'S GUIDANCE

Commander's guidance is his written expression of training strategy that conveys the battalion commander's training objectives and priorities and highlights training events. The commander's training strategy provides the detail from which training schedules can be developed. It also lays out the sequence of training to be accomplished and includes the who, what, when, and where to train. See Appendix A for an example battalion QTG. Commanders at separate company level and above publish the QTG and YTG to allow sufficient time for subordinate commanders to conduct near-term planning (Figures 3-17 and 3-18). Subordinate leaders provide planning recommendations for inclusion in the commander's written guidance.

Topics normally addressed in the QTG and YTG are--

- Commander's training assessment of METL proficiency.
- Training priorities based on assessment.
- Integration of slice training. (Train as you fight.)
- Impact of time management systems on scheduled training.
- Integration of soldier, leader, and collective training (multiechelon training).
- Allocation of resources.
- Impact of new equipment and NET.
- Evaluations, inspections, and feedback.
- Integration of maintenance training. (Train to maintain.)
- Trainer preparation time (pre-execution checks to ensure safe and realistic training). (Train the trainer.)
- Designation of units which will portray the OPFOR during planned exercises.

Figure 3-17. AC short-range planning cycle.
Figure 3-18.
RC commanders may publish YTG in the form of a training circular or a memorandum. When different type subordinate units are involved YTG may focus on mandatory requirements; for example, IDT dates, AT dates, weapons qualification, HIV testing, or records review.
The battalion commander allocates training time by matching METL tasks with programmed events. For example, the TF commander plans a TF TEWT and company team MAPEX to take full advantage of the scheduled brigade CPX prior to the TF FTX (Figure 3-19).
This planning process provides a structure for improving and sustaining proficiency on mission essential soldier, leader, and collective tasks. Leaders must emphasize sustainment after the task has been performed to standard. They must allocate sufficient time to retrain and repeat critical tasks often enough to sustain proficiency.

MULTIECHELON TRAINING

Commanders provide guidance on the use of multiechelon training to plan and refine training events. Multiechelon training maximizes training opportunities at the decisive time and place. Multiechelon training *must* occur during all collective training. Specific tasks for soldiers and leaders must be planned and evaluated at each echelon. The battalion commander determines which tasks the battalion will train based on his assessment of proficiency. Each subordinate leader conducts a similar assessment and determines soldier, leader, and collective tasks to be trained. Generally, tasks selected

for training by subordinate leaders support the training objectives of the commander directing the event.
Lane training is an excellent way to execute multiechelon training using external support and evaluation. It enables a unit to train repetitively to standard with a tough, competent OPFOR employing appropriate MILES and OCs. However, lane training is resource-intensive, to include ammunition, pyrotechnics, OPFOR, training areas, TADSS (Appendix E), MILES-related equipment, support unit assets, and evaluators.
Regardless of the echelon which directs a training event, all subordinate leaders must view it as a training opportunity. Commanders determine which METL tasks they can train within the conduct of the higher unit's training event. Samples of multiechelon events are Figures 3-20, 3-21, and 3-22.
Figure 3-19. Planning Matrix.
Figure 3-20. Sample signal battalion multiechelon exercise.
Figure 3-21. Sample supply and service multiechelon exercise.
Figure 3-22. Sample task force multiechelon exercise.

PLANNING CALENDARS

Short-range planning calendars are published along with the QTG and YTG, graphically depicting the schedule of events. Calendars should be posted where soldiers can see them. Figure 3-23 is a sample AC signal battalion QTC in the SATS format. Figure 3-24 is a sample RC main support battalion YTC. Although company commanders are not required to prepare short range planning calendars, they may do so to use as a management tool.
Figure 3-23. Sample Active Component QTC.
Figure 3-24. Sample Reserve Componet YTC.

QUARTERLY AND YEARLY TRAINING BRIEFING

AC commanders brief the QTB to the commanders two levels above. Battalion commanders brief the division commander and company commanders brief the brigade commander. Battalion commanders in separate brigades and regiments present the QTB to corps major subordinate commanders. The YTB for RC units is normally presented to the next higher peacetime commander. Separate RC battalion commanders and company commanders may also brief the next higher wartime commander. Some RC units may not be able to conduct in-person briefings. In those cases, commanders must use other means such as messages or mail.
The briefings are designed to discuss past, present, and future training expectations. They result in a training contract or agreement between the senior and subordinate commander. This contract or agreement consists of two parts. First, upon his approval of the subordinate's plan, the senior commander agrees to provide resources and protect the subordinate unit from unprogrammed training distracters. Second, the subordinate commander agrees to execute the approved training to standard.
The QTB is conducted prior to the lock-in window (ideally about six weeks before execution of next quarter's training in AC units) after drafting the QTG and QTC. The YTB is conducted prior to the start of the fiscal year in RC units, following drafting of the YTG and YTC. After approval by the next-higher commander, the training guidance and calendar are published. The following topics as a minimum should be briefed:

- Unit's METL assessment.
- Training assessment (to include assessment of slice elements).
- Training briefed, but not conducted, from last QTB or YTB.
- Commander's strategy to train METL tasks.
- Next quarter's or year's training.
- Assessment of soldier and leader training.
- Linkage of soldier, leader, and collective task training.
- Resource management and restrictions.
- Long-range training update.
- Lessons learned.

The CSM and 1SG normally brief after their commander. They provide an analysis of the unit's soldier training proficiency and discuss the unit's proposed soldier training and education plans. Special emphasis must be placed on low-density MOSs. Areas of discussion should include--

- An assessment of the unit's battle focused soldier and leader training program.
- Soldier training proficiency feedback received during the previous short-range planning period.
- A description of METL-derived soldier tasks to be emphasized during the upcoming period (such as marksmanship program).
- A description of soldier and collective tasks linkages.
- The unit's education, Army Physical Fitness Test (APFT), and overweight programs.

The senior commander determines the format and content of the briefing. (See Appendix F for sample.) However, the format should be flexible enough to allow subordinate commanders, CSMs, and 1SGs to highlight their strengths, weaknesses, initiatives, and priorities.
The division and brigade commanders must ensure that the slice leaders attend the battalion QTB to integrate training plans. Participants could include division staff, DISCOM, FSB commanders, division artillery (DIVARTY), direct support (DS) field artillery commanders, DS intelligence commander, and separate battalion commanders.

The battalion commander ensures that the following prepare, attend, and participate in the briefing:

- Battalion CSM.
- All subordinate company commanders and their 1SGs.
- Battalion staff (executive officer, S1, S2, S3, S4, battalion maintenance officer (BMO), signal officer, and chaplain, or their respective NCO counterparts).
- Specialty platoon leaders (mortar, scouts, medical, signal, and support).
- Slice leaders (engineer, air defense (AD), FSO, MI GSR, and ALO).
- Others as deemed appropriate by the commander.

The company commander ensures that the 1SG, platoon leaders, and platoon sergeants attend the company training briefing. He also coordinates with battalion to ensure his habitually associated slice leaders attend. This may be difficult for RC units.
The QTB or YTB highlights the senior commander's leader development program. Subordinate commanders and leaders can then see how their METL and training plans fit into the battle focused training programs of their senior commanders and peers.
The briefing creates confidence throughout the command by ensuring that leaders at all levels understand the intent of their senior commanders. Commanders can then make effective, independent training decisions to meet that intent as they execute the approved training plan. This level of mutual understanding can only be developed through close and professional interaction.
Battalion and company commanders use the briefing as a training management review process. The briefing helps the unit--

- Review training strategy, training events, strengths, and weaknesses.
- Discuss previously coordinated training events and associated activities.
- Explain how the unit's training program will help the unit to attain the higher commander's goals and objectives.
- Highlight problem areas for discussion.
- Clarify command responsibilities for allocating resources. (Additionally, senior commanders recommend ways to more efficiently use available resources.)
- Eliminate training distracters.

The commanders' contract or agreement locks in resources to enable battalion and subordinate commanders to begin near-term planning.

NEAR-TERM PLANNING

Near-term planning defines specific actions required to execute the short-range plan. It is the final phase of planning prior to the execution of training. In near-term planning, commanders--

- Conduct training meetings to coordinate and finalize all training events, activities, and resources.
- Provide specific guidance to trainers and OCs.
- Prepare OPFOR plan and training objectives.
- Prepare T&EOs.
- Ensure slice units have been integrated into the unit's training.
- Determine time for pre-execution checks.
- Prepare detailed training schedules.

Near-term planning covers a six-to eight week period prior to the execution of training for AC units (Figure 3-25), and a four-month period prior to execution of training for RC units (Figure 3-26).
Figure 3-25. AC near-term planning cycle.
Figure 3-26. RC near-term planning cycle.

TRAINING MEETINGS

Training meetings are *non-negotiable* at battalion and company level. They will be held. Training meetings provide guidance for forming training schedules.
The payoff for well-structured, well-organized, and recurring training meetings is training that is exciting and demanding and is directly related to the unit's mission. Figure 3-27 lists important points about training meetings.
The primary focus of training meetings at battalion level is training management issues for the next six weeks. Coordination meetings should be held to resolve resource issues prior to the battalion training meeting. At company level, training meetings focus on the specifics of training to be conducted.
Meetings are also held at platoon and squad level. Essential soldier, leader, and collective training needs must be identified and sent up the chain of command. Likewise, information passed out at the company training meeting must reach every soldier through the platoon chain of command. The training schedule provides this detailed information.

Suggested Participants

This section recommends participants for battalion and company training meetings. At battalion level, participants may include--

- Battalion commander.
- Command sergeant major.
- Battalion executive officer.
- Company commanders and first sergeants.
- Specialty platoon leaders (medical, support, scouts, mortar, signal as required).
- Slice leaders (FSO, engineer, AD, GSR, and MST).
- Operations officer from the FSB or main support battalion (MSB);
- Battalion staff (S1, S2, S3, and S4).
- Special staff (chaplain, chemical officer, BMO, and physician's assistant).
- Battalion operations sergeant.

Figure 3-27. Points about training meetings.
When appropriate, RC commanders may want to include participants from the readiness group and AC partnership unit. When geographical dispersion precludes the company attending battalion training meetings, essential training information must be exchanged. Units should consider mail or other means to exchange critical information. At company level, participants include the following:

- Company commander.
- First sergeant.
- Executive officer.
- Platoon leaders and platoon sergeants.
- Supply sergeant.
- NBC NCO or specialist.
- Motor sergeant (as applicable).
- Slice team leaders (medical, FIST, engineer, and others, as applicable).
- Other key leaders who are designated by the commander.

Suggested Agenda

Training meetings at each echelon review past training. Further, they refine and plan training for the next six weeks.

At *battalion* level, the following agenda may be used:

- Review of QTC or YTC.
- Past training (briefed by company commanders), to include--

  --Assess training conducted since the last meeting.
  --Review reasons for training planned, but not conducted.
  --Update the current status of training proficiency.

- Near-term training, to include--

  --Discuss new guidance received from higher commanders.
  --Lock in training scheduled for next four to six weeks (next three months for RC).
  --Review and complete pre-execution checks (document training distracters from higher headquarters).
  --Issue commander's guidance for training scheduled six to eight weeks out (four months out for RC).
  --Review preparations for multiechelon training.
  --Review the short-range plan.
  --Review projected resources.

At *company* training meetings, the agenda may be as follows:

- Past training (briefed by platoon leaders and sergeants), to include--

  --Assess training conducted since the last meeting (collective and soldier tasks).
  --Review reasons for training planned, but not conducted.
  --Determine the current status of training proficiency.

- Near-term training, to include--

  --Apply new guidelines from higher commanders, especially new or unscheduled requirements.
  --Review pre-execution checks for training scheduled for next four to six weeks (next three months for RC).
  --Ensure platoon leader and sergeant recommendations are included in training scheduled six to eight weeks out (four months out for RC).
  --Identify and prepare opportunity training.
  --Identify key soldier changes and resource needs.

Figure 3-28 depicts an example agenda and discussion from a company training meeting.

TRAINING SCHEDULES

Near-term planning conducted at the training meeting results in detailed training schedules. The training schedule is the unit's primary management tool to ensure training is conducted on time and by qualified trainers with the necessary resources. Draft training schedules and pre-execution checks must be initiated at least six to eight weeks (four months for RC) prior to the training. This ensures resources are coordinated and external support is requested. For AC, training schedules are published four to six weeks prior to execution; for RC, three months prior. Pre-execution checks and execution of training may be more difficult for the RC than for the AC. Geographical dispersion, remoteness from support installations, and lack of facilities and TADSS demand extra effort to accomplish training. For example, RC units may travel four hours from Kansas City, KS, to Fort Riley, KS, to use qualification ranges. Or trainers may travel two hours from Charleston, SC, to Fort Jackson, SC, to obtain TADSS for a weekend drill.

Once the battalion commander approves and the company commander signs the training schedule, it is locked in and constitutes an official order. It can only be changed by the approving authority; for example, for the company, it is normally the battalion commander. Higher headquarters must then protect units from unprogrammed events, activities, and other distracters.

Leaders must ensure daily training is conducted to standard and adheres to the training schedule. CSMs and 1SGs are key to making this happen. Soldiers have a legal responsibility to attend scheduled training.

Commanders establish procedures to minimize changes to the training schedules. Responsibilities of commanders are normally established as follows:

- Subordinate leaders recommend the sequence of training and allocation of time, resources, and TTP during the company training meeting. The company commander drafts the training schedule based on this input.

- The battalion commander approves the training schedule and the company commander signs it. The battalion commander provides necessary administrative support for publishing.

Figure 3-28. Sample training meeting agenda.

- The brigade commander normally reviews each training schedule published in his command and visits selected training.

- The division commander reviews selected training highlights prepared by the division staff. These provide information on scheduled training that he may decide to visit and assess.

SATS provides commanders an excellent standardized format for training schedules. For those units which do not have SATS, the format should remain the same. Training schedules should specify--

- The day and time training starts and ends. (The correct amount of time must be allocated for scheduled training and additional training required to correct deficiencies.)
- Soldiers to be trained (specific enough to ensure each soldier knows where he is to be).
- Subject to be trained (soldier, leader, and collective tasks).
- Location of training (range, grid location, or MTA).
- Trainers, by name (primary and assistant).
- Training references (for example, FM 22-5, ARTEP 71-2-MTP, to include chapter and task number, page and paragraph number, if applicable).
- Uniform and equipment required.
- Comments and remarks concerning uniform, weapons, equipment, references, and safety precautions. Opportunity training topics should also be added.

Figure 3-29 provides suggested weekly steps for AC company training schedule development. The RC process involves the same steps spread over a four-month period. Units designated as OPFOR will also use the same process to prepare their soldiers and leaders to portray a doctrinally correct threat.
Near-term planning culminates when the unit executes the training planned on the training schedule. Sample training schedules for AC and RC companies are at Figure 3-30 and Figure 3-31.
Figure 3-29. Training schedule development.
Figure 3-30. Sample AC weekly training schedule-infantry company.
Figure 3-31. Sample RC monthly training schedule.
Figure 3-31 (continued).

PRE-EXECUTION CHECKS

Pre-execution checks are the informal planning and coordination conducted prior to training execution. They are developed to systematically prepare soldiers, trainers, and resources to ensure training execution starts properly. These checks are developed and responsibility for them fixed during the short-range planning phase. They become increasingly detailed during the near-term phase. Pre-execution checks provide the attention to detail needed to use resources efficiently. Figure 3-32 shows a sample pre-execution checklist.
Figure 3-32. Sample pre-execution checks.

PREPARATION FOR TRAINING

Formal planning for training culminates with the publication of the training schedule. Informal planning and detailed coordination (preexecution checks) continue until the training is performed.

To conduct effective, meaningful training for soldiers, leaders, and units, thorough preparation is essential. Well-prepared trainers, soldiers, and support personnel are ready to participate and their facilities, equipment, and materials are ready to use. Proper preparation gives trainers confidence in their ability to train. They must rehearse their preparations and review the tasks and subtasks to be covered during their training. To prepare trainers to conduct performance-oriented training, commanders and leaders must--

- Provide training guidance, resources, and references.

- Provide preparation time so that the trainer can--

  --Review references, such as ARTEP 71-2-MTP, soldier's manuals, FMs, and TMs to understand tasks, conditions, and standards.
  --Prepare a T&EO.
  --Gather and prepare training support items, equipment, and supplies such as MILES equipment, other TADSS, and Class III and IX items.
  --Conduct a reconnaissance of training site.
  --Prepare the soldiers for training.

- Schedule rehearsals for the trainer.

- Conduct rehearsals to--

  --Identify weak points in the training plan.
  --Teach effective training techniques.
  --Coach the trainer until he feels comfortable.
  --Ensure all safety and environmental considerations are met.
  --Ask pertinent questions to determine if the leader is technically and tactically proficient.
  --Determine how the trainer will evaluate the soldiers' or unit's performance at the end of training for compliance with the training objective. Have the trainer demonstrate the evaluation procedure, if appropriate.
  --Assess subordinate trainer competencies and provide developmental feedback to them throughout the training preparation and execution process.
  --Give them confidence in their ability to train.

- Prepare T&EO to--

  --Guide soldier, leader, and collective training.

--Provide summary information on training objectives (soldier, leader, and unit) which support mission essential tasks.
--Provide information on resource requirements.
--Provide generic conditions. Leaders must adjust to METT-T.

Leaders use MTPs, MQS manuals, soldier'smanuals, drill books, and similar publications to develop the T&EO. Whenever possible, they use the published T&EO. An example T&EO from ARTEP 71-2-MTP is at Figure 3-33.

To conduct effective, meaningful training for soldiers, leaders, and units, thorough preparation is essential. Leaders themselves must be able to perform the task before trying to teach others. Proper preparation gives them confidence in their ability to train. After proper planning and preparation are complete, soldiers, leaders, and units are ready to execute training to standard.

Figure 3-33. Example battalion task force T&EO.

FM 25-100, Pages 5-1 & 5-2.
- See Next 2 Pages -

CHAPTER 5

Assessment

The best form of "welfare" for the troops is first class training, for this saves unnecessary casualties.

Field Marshal Erwin Rommel

Evaluation of Training

Evaluation of training measures the demonstrated ability of individuals, leaders, and units against specified training standards. Evaluation is integral to training.

EVALUATIONS

Evaluations can be informal, formal, internal, and external, or any combination of these. *Informal* evaluations take place whenever a leader visits ongoing training. This type of evaluation provides real time feedback on the training environment and the proficiency resulting from training. *Formal* evaluations are resourced with dedicated evaluators and are generally scheduled in the long-range or short-range plans. Formal evaluations are normally highlighted during short-range training briefings.

Internal evaluations are planned, resourced, and conducted by the organization undergoing the evaluation. *External* evaluations are planned, resourced, and conducted by a headquarters at an echelon higher in the chain of command than the organization undergoing the evaluation.

Evaluations for individual and small-unit training normally include every soldier and leader involved in the training. For large-scale training events, evaluators sample a number of individuals and subordinate organizations to determine the likelihood of the entire organization performing specific mission essential tasks to standard.

During and after the evaluation, evaluators prepare their findings and recommendations. They provide these reports to the evaluated unit commander and higher commanders as required by the headquarters directing the evaluation. Evaluation documentation can range from an annotated T&EO for an internal training evaluation to a comprehensive report on Reserve Component units during AT periods. Another example of detailed evaluation reports are CTC take home packages. These packages consist of videotapes and written documentation of after-action reviews (AARs), a report of unit strengths and weaknesses as noted by the observer-controllers, and recommendations for future home station training.

AFTER-ACTION REVIEW

The after-action review provides feedback for all training. An AAR is a structured review process that allows training participants to discover for themselves what happened, why it happened, and how it can be done better. The AAR is a professional discussion that requires the active participation of those being trained. An AAR is not a critique and has the following advantages over a critique:

- Focuses directly on key METL-derived training objectives.
- Emphasizes meeting Army standards rather than pronouncing judgment of success or failure.

- Uses "leading questions" to encourage participants to self-discover important lessons from the training event.
- Allows a large number of individuals and leaders to participate so that more of the training can be recalled and more lessons learned can be shared.

The after-action review (AAR) consists of four parts:

- *Establish what happened.* The evaluator and the participants determine what actually happened during performance of the training task. For force-on-force training, OPFOR members assist in describing the flow of the training event and discuss training outcomes from their points of view.
- *Determine what was right or wrong with what happened.* The participants establish the strong and weak points of their performance. The evaluator plays a critical role in guiding the discussions so that conclusions reached by participants are doctrinally sound, consistent with Army standards, and relevant to the wartime mission.
- *Determine how the task should be done differently the next time.* The evaluator leads the group in determining exactly how participants will perform differently the next time the task is performed. This results in organizational and individual motivation to conduct future sustainment training at desired levels of proficiency.
- *Perform the task again.* This is done as soon as possible to translate observation and evaluation into corrective action. Additional training allows the participants to apply the lessons learned during the AAR. Leaders understand that all tasks will not be performed to standard. Therefore, during the short-range and near-term planning process, they provide flexibility in training events and schedules which allow for additional training immediately following the AAR.

The AAR is often "tiered" as a multi-echelon leader development technique. Following an after-action review with all participants, senior trainers may use the AAR for an extended professional discussion with selected leaders. These discussions usually include a more specific AAR of leader contributions to the observed training results. More important, these sessions are also excellent forums for discussing more advanced topics that should flow from the training just completed, such as emerging doctrine or implications for future force integration actions.

EVALUATORS

Evaluators must be trained as facilitators to conduct after-action reviews that elicit maximum participation from those being trained. In addition to being able to plan, prepare, and conduct AARs, effective evaluators must also—

- Be familiar with the evaluated organization's METL.
- Be tactically and technically proficient in the tasks evaluated.
- Know the evaluation standards.
- Follow the tactical and field SOPs for the organization being evaluated.
- Apply relevant information about the evaluated unit, such as wartime missions, personnel turbulence, leader fill, and equipment status.

Experience has shown that providing qualified individuals to evaluate others is well justified. Not only do the individuals and units receiving the training learn from the evaluator, but the evaluator learns by observing the evaluated unit.

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Tab 31

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Standard 31 Reference Excerpts

TR 350-70, para II-2-7f, Administra tive Time Hours.
f. It consists of all the non-academic time included in a course. This is the total time required to perform required administrative activities. Scheduling courses requires the identification of administrative time as well as academic time to determine the full length of time a student must be in attendance at the training site. Administrative time—

(1) Includes—

(a) Inprocessing
(b) Open time
(c) Retesting
(d) Army Physical Fitness Test (APFT)
(e) Outprocessing
(f) Commandant's time
(g) Payday activity
(h) Commander's orientation
(i) Remedial training
(j) Guard detail

(2) Shall not exceed 4 hours per AC training week. Additional administrative time can be requested from HQ TRADOC, ATTN: ATOM-P. The request must be fully justified, including an explanation for why the administrative activity cannot be accomplished before or after normal training time.

(3) Is not supported by instructor contact hours (ICHs).

TR 350-6, para 3-33, Remedial training.
a. Soldiers unable to attain training standards will be provided remedial training to enable them to remain in cycle, rather than be given a new start in a follow-on cycle.

b. Soldiers who have not passed an APFT prior to graduation may be retained in the fitness training unit (FTU), or similar holding unit, for remedial training; however, they will continue to be reported as holds in ATRRS using REASON CODE "B: Physical Fitness (Remedial Tng-APFT)."

c. In keeping with the TRADOC investment strategy, a soldier will continue to receive remedial training so long as the chain-of-command determines the soldier has the mental and physical capacity to succeed.

TR 350-10, para 2-7a.

2-7. Conduct of training. Commandants will ensure training is conducted and evaluated per the principles listed in Field Manual (FM) 25-100 in conjunction with FM 25-101 (Note: both manuals to be revised as new "3" series FM publications). Noncommissioned Officer Academy commandants will use the training schedule format outlined in FM 25-101.

a. Prior to enrollment, students must be fully capable of performing supporting individual tasks and the tasks required in the next lower level course. Commandants may evaluate student capabilities through appropriate testing, and if necessary, provide remedial

training, recycle to a later class, or return to unit of assignment those students who do not meet course prerequisites or do not have the required minimum skills. Remedial training will be scheduled when applicable on the training schedule, but will not be conducted during normal POI time.

b. Schools will train tasks only at the skill level prescribed for each course.

c. Student training, SGL, SSGL and instructors.

(1) School staffs, faculties, SSGL, and training departments will supervise and support SGL, instructors, and students, and ensure commitment to training, educating, and developing each student.

(2) Trained, qualified, certified, and experienced SGL, SSGL, and instructors will conduct and supervise student training (SSGLs may be used as SGLs as the NCOA commandant deems necessary to accomplish the training mission or as temporary fill-ins when shortages of by-grade SGLs dictate the need to do so). Small group leader-to-student ratios will be sufficient to ensure student control and supervision and facilitate teaching, coaching, mentoring, and developing individual student leadership skills to the level for which training is provided. (See paragraph 2-13.)

(3) Small group leaders, SSGLs, and instructors will provide students with progressive and sequential training, accurate evaluations, and timely feedback via task performance after action reviews.

(4) When applicable, SGLs, SSGLs, and instructors will use mission orders to convey training objectives. Mission orders will clearly articulate the commander's intent. Small group leaders, SSGLs, and instructors will ensure students use mission orders to demonstrate a thorough understanding of the mission and the commander's intent.

d. Training environments must enhance learning, encourage student initiative, require students to attain and sustain high levels of discipline, have defined, publicized, and enforced standards, and focus on preparing the student to lead soldiers through training, maintenance, deployment, and sustained tactical operations in support of unit missions.

e. When possible, students will be given opportunities to gain experience by leading and/or training soldiers in other courses (for example, conduct marksmanship and physical fitness or CTT training for advanced individual training students).

f. Commandants will use proponent-developed end-of-course (Phase II) CPX, FTX, STX, or LTX, virtual or live, in the field or at a job site, as a culminating event designed to evaluate (Go/No-Go) the soldier's ability to perform the terminal learning objectives of the course to graduate. These events will be at least 72 hours in length, be scenario driven and conducted under CONOPS conditions. Leader development course

proponents will publish minimum guidelines and evaluation criteria for exercise execution in the course management plan of each course they develop.

g. Student evaluations. Small group leaders and instructors will—

(1) Determine if the student has demonstrated a sufficient level of competency to pass the course IAW the student evaluation plan as prescribed in TRADOC Reg 350-70.

(2) Conduct developmental counseling to provide students information on their strengths and weaknesses, and courses of action to improve performance.

(3) Consolidate and analyze student performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commandant/Course Management Plan (CMP). Small group leaders, SSGLs, and instructors will provide students documented feedback and will use analysis results to determine ratings for completing DA Form 1059 (Service School Academic Evaluation Report (AER)) and course academic records and reports. Records and reports must adequately support appropriate administrative action for students who fail to meet course requirements.

(4) Complete an AER (DA Form 1059) for all students per AR 623-1. Whenever possible, students should receive a copy of their completed AER at graduation. However, although Army policy allows for completion within 60 days after graduation, at a minimum, students will be provided an opportunity to review their draft AER prior to departure. Written comments in block 16 will be tailored for each individual.

h. Training material. Sufficient quantities of the most current training products will be maintained for each class.

(1) Training support package and examination material.

(2) Lesson reference files and course changes.

(3) All training aids and devices referenced in the current lesson plans.

(4) Student issue materials including advance sheets, supplemental readings, compact discs, student handouts, reference books, practical exercises, and solution sheets.

(5) At least one visitor folder will be available in each classroom. See TRADOC Reg 350-18 for visitor's folder contents.

POI/Course Management Plan

DSSC CMP Chapter 1

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Tab 32

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Standard 32 Reference Excerpts

AR 350-41, para 9-5a, Physical fitness training policy.
a. All personnel in the active Army, the ARNG, and the USAR will take part in either collective or individual physical fitness training programs year-round. Active Army units, individuals, and full-time Guardsman and Reservists will conduct regularly-scheduled (at least 3 to 5 times per week) vigorous physical fitness training during the unit's normal duty-day (the duty-day is determined by installation commanders).

b. ARNG and USAR commanders incorporate mission and readiness-enhancement physical fitness training unto appropriate inactive duty training periods.

c. Personnel will be excused from physical fitness training only during periods of temporary or permanent medical limitations established according to AR 40-501. Personnel who cannot take part in physical fitness training because of a valid profiled condition will be placed in rehabilitative programs, designed by health care personnel within profile guidelines, and supervised by the commander.

d. All soldiers age 40 and over will be evaluated for coronary heart disease risk factors as part of their periodic physical examination. The medical procedures for the Cardiovascular Screening Program are outlined in AR 40-501. It is the soldier's responsibility to ensure that the CVSP is conducted in a timely manner, as close to the 40th birthday as possible, and as promptly as medical facilities permit.

AR 350-41, para 9-8, Physical fitness testing procedures.
The purpose of physical fitness testing is to give soldiers an incentive to stay in good physical condition and allow commanders a means of assessing the general fitness levels of their units.

a. Physical fitness testing will not form the foundation of unit or individual fitness programs; it is simply one element of a total program. Fitness testing is designed to ensure the maintenance of a base level of physical fitness essential for every soldier in the Army, regardless of MOS or duty assignment. Unit programs must be designed to take this base level of conditioning and raise it to help meet or exceed mission-related physical performance tasks.

b. TRADOC develops physical fitness test standards and ODCSOPS approves them. The APFT provides a measure of cardiorespiratory and upper and lower body muscular endurance. It is a performance test that indicates a soldier's ability to perform physically and handle his or her own body weight. Standards are adjusted for age and physiological difference between men and women. The APFT consists of push-ups, sit-ups, and a 2-mile run, done in that order on the same day. For profiled soldiers, a record test must include an aerobic event. The only approved aerobic events are the 2-mile run, 800-yard swim, 6.2-mile bike ride (stationary or track), or the 2.5-mile walk. Testing is prescribed for all soldiers as follows:

(1) The intent of the APFT in the Army Physical Fitness Program is to provide an assessment of the physical fitness training program. Temporary training periods solely devoted toward meeting APFT requirements are discouraged. *Active Army soldiers and Active Guard/Reserve will take the APFT at least twice each year with a minimum of 4 months separating record tests, if only two record tests are given.*

(2) Commanders may administer the APFT as often as they wish (for record or practice); however, they must specify beforehand when the results are for record purposes. Intent is for physical fitness programs to sustain adequate physical fitness. Accordingly, all soldiers (active, Guard, and Reserve) should be able to take and pass the APFT at any time. The APFT is the commander's tool for measuring minimum physical fitness. He may use that tool as often as necessary to ensure the unit is maintaining minimum physical fitness standards.

(3) Personnel with medical profiles that preclude taking the push-up or sit-up event, or both, will take the remaining events, if a physician or physician's assistant approves. The 2-mile run event, however, or an approved alternate test event as outlined in FM 21-20, must be taken if the test is to count for record. The alternate test is primarily designed for soldiers with permanent physical profiles which preclude them from taking the 2-mile run; however, soldiers with temporary profiles of long duration (more than 3 months) may also take an alternate test if approved by the commander after input from health care personnel. Alternate test events and their administration are outlined in FM 21-20. Soldiers must be given 3 months to prepare for the alternate test from either the date of the profile or the date recommended by health care personnel.

(4) Soldiers who fail a record APFT for the first time or fail to take the APFT within the required period will be flagged according to AR 600-8-2. In the event of a record test failure, commanders may allow soldiers to retake the test as soon as the soldier and the commander feel the soldier is ready. Soldiers without a medical profile will be retested not later than 3 months following the initial APFT failure. RC soldiers, not on active duty and without a medical profile, will be tested no later than 6 months following the initial APFT failure.

(5) Personnel who initially fail the CVSP and are subsequently cleared, will have no more than 179 days of conditioning prior to the requirement to successfully meet the standards of a record APFT.

(6) All soldiers must attain a score of at least 60 points on each test event and an overall score of at least 180 points. Three exceptions are listed below.

(a) Soldiers medically excused from an APFT event or events must attain an APFT score of GO, 60, or 120 points depending on the number of APFT events tested.

(b) Soldiers in basic training must attain 50 points on each event and an overall score of 150, or a score as determined by ODCSOPS in coordination with TRADOC. (This exception does not apply to advanced individual training, one station unit training (OSUT), or leader development schools listed in paragraph 9-2f(5).)

(c) Soldiers awaiting IET may be tested but no formal record of their score will be maintained.

(7) Soldiers in IET will be tested near the end of the course to qualify for completion of basic training, AIT, OSUT, and one station training.

(8) Officer and warrant officer candidates in precommissioning training and officers and warrant officers in initial training courses, such as officer basic courses, will be tested at least once (near the end of their course) and must pass the test to graduate.

(9) Officers, warrant officers, and enlisted personnel attending the following leader development courses must take and pass the APFT in order to graduate: PLDC, BNCOC, ANCOC, FSC, SMC, SWOT, OBC, OAC, CAS3, CGSOC, and AWC. Other courses, with DA approval, may require passing the APFT for either enrollment or graduation.

(10) Personnel in joint, North Atlantic Treaty Organization, Office of the Secretary of Defense, and all other staff assignments are subject to, and will take, the APFT. The senior Army soldier in the organization will conduct the APFT and ensure inclusion of scores in records and performance reports.

(11) ARNG personnel and members of USAR troop program units (TPUs) will take the APFT at least once a year. If only one record test is taken each year, at least 8 months will elapse between record tests, except for make-up testing and retesting of those who failed the test. Retesting will be done according to (4) above.

(12) IMA and IRR soldiers who are on tours of active duty for annual training, active duty training, or active duty special work will be administered the APFT when they are placed on tours of duty 12 or more days in length. *The test will be administered to IRR members normally once each year, except for those who failed the test; they will be retested according to (4) above. Members of the IRR and USAR TPUs on extended active duty to fill Army vacancies will comply with para 9-8b(1) above.* The commander of the unit or agency to which the IRR member is attached for duty will administer the APFT. Individuals assigned to individual mobilization augmentee positions will comply with policies and programs directed by their assigned commander. All commanders may use the APFT as a diagnostic tool to assess their units at any time; however, they will provide reasonable advance notice to soldiers when an APFT will be administered for record purposes. Soldiers on active duty must comply with policy provisions of this chapter no matter what their status was prior to coming on active duty.

(13) TRADOC sets physical fitness standards for entry into Ranger, Special Forces, Airborne training, and into other schools requiring separate physical fitness standards. The ODCSOPS will review and approve these standards.

(14) Results of the APFT will be recorded on DA Form 705 (Physical Fitness Test Scorecard) which will be maintained for each servicemember. This scorecard will be kept at a central location in the unit and will accompany the individual military personnel records jacket at time of permanent change of station. Units and separate offices will have a system for monitoring performance and progress of their soldiers.

(15) Individuals will be weighed when they take record Army Physical Fitness Tests or at least every 6 months according to AR 600-9.

(16) All soldiers (AC and RC) who reached age 40 before 1 January 1989 will not be tested until medically evaluated and cleared by the CVSP. Uncleared soldiers may continue their current level of exercise during the evaluation process, including participation in unit or individual programs, but they will not be permitted to take the APFT until cleared.

(17) Soldiers (Active and Reserve) who reach age 40 on or after 1 January 1989 are required to take the APFT, unless prohibited by a medical profile. These soldiers will receive their CVSP screening in conjunction with their next periodic physical examination.

See AR 600-9.

See FM 21-20 (Change 1).

TR 350-6, Chapter 4.
Physical Fitness Training (PFT)
4-1. General. This chapter establishes policies for conducting PFT and testing in all modes of IET. Physical fitness training and testing will be applied in conjunction with AR 350-41 and FM 21-20.

a. Physical fitness training in IET will—
(1) Progressively condition and toughen the soldier for combat duties.
(2) Develop the soldier's self-confidence, discipline, and esprit.
(3) Develop a healthy lifestyle through education.

b. The primary objective of PFT is to improve the five components of fitness: cardio-respiratory endurance, muscular strength, muscular endurance, flexibility, and body composition.

c. Physical fitness training must be progressive, disciplined training which challenges the soldier's physical ability. The progressive nature of the PFT program is essential for the most beneficial development and safety of soldiers. The intensity and degree of challenge of the exercises must be increased in logical increments throughout the training cycle.

d. The PFT program in IET will be based on the application of the frequency, intensity, time, and type factors.

e. Command presence at PFT will emphasize the importance of PFT. During the PFT sessions, a minimum of two drill sergeants will be present for each platoon for BCT/OSUT, one drill sergeant per platoon in AIT. The cadre's primary responsibilities are to demonstrate proper procedures, correct soldiers' performance, encourage soldiers to meet the standards, and supervise those conducting PFT. One cadre member will perform the exercises with the soldiers to monitor intensity level and provide a leader role model. The IET cadre should have their own PFT, separate from the soldiers.

f. The APFT is the vehicle for assessing fitness. Procedures for administration and grading of the APFT are outlined in FM 21-20.

g. Record APFTs for BCT, OSUT, and AIT will be conducted primarily by company cadre, augmented by other personnel if approved by the battalion commander, and monitored by battalion leadership for quality control.

h. Phase IV and V IET soldiers with permanent profiles will take the APFT IAW AR 350-41. A soldier, whose profile precludes taking the push-up, the sit-up, or both events, will take the remaining event(s), if approved by a physician or physician's assistant. The 2-mile run event, or an approved alternate test event as outlined in FM 21-20, must be taken if the test is to count for record. The alternate test is for soldiers with permanent physical profiles that preclude them from taking the 2-mile run. Soldiers must be given 3 months to prepare for the alternate test from the date of the permanent profile, IAW AR 350-41.

4-2. Health and safety considerations.
a. Health and safety considerations pertaining to PFT are outlined in AR 350-41.

b. Initial Entry Training commanders will implement physical training programs IAW the following guidelines to eliminate unnecessary risk of training accidents and injuries:

(1) Reception battalion personnel will fit soldiers with suitable running shoes.

(2) Physical training runs will use ability groups and adhere to the principle of recovery.

(3) On running days, soldiers will run in ability groups. Unit formation runs are a good tool to promote esprit-de-corps, but will be limited to one per cycle/class, or one per month.

(4) Schedule runs on days soldiers are not required to walk for extended periods of time, such as road marches.

(5) Physical training on days immediately preceding the diagnostic and record APFT should focus on warm-up and flexibility.

(6) Confidence obstacle courses (COC) utilized by IET soldiers will be constructed, maintained, and administered IAW the guidelines provided in appendix K.

4-3. Conduct of training.
a. Initial Entry Training.

(1) The RECBNs will identify IET soldiers for accession into the FTU IAW appendix H.

(2) The concept of total fitness is the basis of the PFT program.

(3) The duration and intensity of PFT will be adjusted to compensate for other physically demanding activities scheduled.

(4) Physical fitness training periods will be completed at least 30 minutes prior to meals, and not begin until at least 60 minutes after meals.

(5) The standards for performance of exercises will be strictly applied. Remedial training will be provided for soldiers who fail to maintain the unit or group progression rate.

(6) For use of PFT as corrective action, see paragraph 2-6h.

b. Basic Combat Training.

(1) An initial diagnostic APFT will be administered to establish goals and progressive fitness programs. Physical fitness training should emphasize gradual progression in intensity and regularity. Physical fitness training will be conducted each training day throughout the cycle.

(2) Diagnostic APFTs will be administered as part of Phase I and II performance evaluations.

(3) The record APFT will be administered during the last 2 weeks of training to determine if the soldier has achieved the APFT standard for graduation (50 points per event; 150 minimum total points). Soldiers who cannot complete the final APFT due to medical profile, and who have successfully completed a diagnostic test (scored 50 points minimum on each of the 3 events on the same test), may be given minimum credit (50 points per event) for having passed the APFT requirement.

c. One Station Unit Training.

(1) An initial diagnostic APFT will be administered to establish goals and progressive fitness programs. Physical fitness training should emphasize gradual progression in intensity and regularity.

(2) Fifty points per event diagnostic APFTs will be administered as part of phases I, II, and III performance evaluations. Sixty points per event diagnostic APFTs will be administered as part of phase IV performance evaluations.

(3) The record APFT will be administered during the last 2 weeks of training to determine if the soldier has achieved the APFT standard for graduation (60 points per event; 180 minimum total points). Soldiers who cannot complete the final APFT due to a temporary medical profile, and who have successfully completed a 60 point per event diagnostic test (passed each of the 3 events on the same test), may be given minimum credit (60 points per event) for having passed the APFT requirement.

d. Advanced Individual Training.

(1) Physical fitness training will be conducted each training day throughout the course.

(2) Diagnostic APFTs will be administered at least once a month through the 20th week of training. Phase V+ (21-plus weeks) soldiers who have met the APFT standards for graduation will take the APFT twice a year IAW AR 350-41.

(3) The record APFT will be administered at the 8th week of AIT, or during the last 2 weeks of training, whichever comes first, to determine if the soldier has achieved the APFT standard for graduation (60 points per event; 180 minimum total points). Soldiers who cannot complete the final APFT due to a temporary medical profile, and who have successfully completed a diagnostic test during AIT (passed each of the 3 events on the same test), may be given credit for having passed the APFT requirement.

e. Reclassified soldiers. The APFT is a graduation requirement for BCT, AIT, and OSUT. This requirement applies to all soldiers attending AIT/OSUT as a result of reclassification action.

*f. Reserve component soldiers must meet APFT requirements at the TRADOC school prior to graduation***.** If the RC soldier is recalled to their parent unit prior to meeting the APFT standard, the soldier must return to the training unit they were released from and pass the APFT before the MOS is awarded.

g. Over 40 requirements. Reserve component personnel at age 40 or older attending IET are subject to the same APFT requirements as AC personnel.

4-4. Physical Training Rehabilitation Program (PTRP).
a. The PTRP is designed for injured IET soldiers and provides a training environment that allows for proper healing and recovery. The program is available at the five ATCs (Forts Benning, Jackson, Knox, Leonard Wood, and Sill) for soldiers who require treatment and/or rehabilitative physical therapy.

b. Procedures for assignment to the PTRP.
1) Physical therapist(s) or appropriate medical officer will recommend a soldier for the PTRP based on the criteria that the soldier:
(a) Was injured in training;
(b) Sustained an injury that is severe enough to necessitate being pulled from current training to allow for proper healing;
(c) Is likely to fully recover and complete all physical requirements of training.
(2) The physical therapist(s) will annotate their recommendation that the soldier be assigned to the PTRP on a Record of Injury Form, a Sick Slip, or Physical Profile Form. The appropriate document(s) will be sent with the soldier to the unit.
(3) Unit commanders will counsel the soldier concerning the recommendation. Units will prepare a New Start Packet recommending PTRP and submit the packet for approval.
(4) Battalion commanders are the approving authority for enrollment in the PTRP.
(5) Once approved by the battalion commander, enrollment of recommended soldiers into PTRP is mandatory.
(6) Soldiers will be out-processed completely from the losing unit prior to being in-processed into the PTRP. Reassignment will be completed within 48 hours of the unit receiving the PTRP recommendation.

c. Specific guidance on PTRP implementation is provided at appendix H.

TR 350-10, para 2-6.

2-6. Physical fitness, weight control, and profiles. See ARs 40-501, 350-1, and 600-9, National Guard Regulation (NGR) 40-501 and TRADOC Reg 350-18. All Active Component (AC) and Active Guard Reserve (AGR) officers, warrant officers and NCOs who reach the age of 40 will receive their over 40 physical, to include a cardiovascular

medical screening program (CVSP) prior to arrival at OES, WOES, NCOES or functional professional development courses. All other soldiers who have reached the age of 40, whose last periodic physical was within the last 5 years, will receive a CVSP in conjunction with their next periodic physical examination. Per AR 40-501, for over 40 soldiers who **have** had a periodic physical within the last 5 years, there is no need to require a CVSP prior to continuing physical training or participating in APFT. Over 40 soldiers arriving at schools who **have not** had a periodic physical within the last 5 years will be denied enrollment and not be allowed to start the course curriculum. This policy will be included in all proponent developed course management plans per TRADOC Reg 350-70, and included in future editions of the pre-execution checklists found in TRADOC Reg 350-18.

a. School's SGLs/instructors will not be assigned to duty with a profile that precludes them from performing all of their duties (i.e., running, marching, or wearing of required equipment, etc.). Exceptions to this policy are SMC and CSMC SGLs/senior small group leaders (SSGLs), who are not required to conduct student performance or academic evaluations on these tasks as part of the course curriculum requirements.

b. Per DA message R251850Z Jul 01, subject: Clarification and Reinforcement of Army Training Policies, attendees of OES and WOES will pass the Army physical fitness test (APFT) prior to their course graduation date. Noncommissioned Officer Education System and NCO functional course (First Sergeant/Battle Staff Courses) attendees will be administered the standard APFT within the first 72 hours of enrollment. Those who fail this initial test will be given one retest to be administered sometime between academic day 7 and 14. Without exception, students must pass the APFT prior to the end of the course or phase (whichever occurs first) to graduate. BNCOC and ANCOC students must pass the APFT before the end of Phase I (common core). In all cases, soldiers who fail the APFT retest will be dropped/dismissed from the course for failure to meet APFT standards. Soldiers failing the initial APFT and found medically unqualified to retest within the required period of time will receive a medical dismissal, (for non-prejudicial medical reasons), returned to their unit, and allowed to be rescheduled to attend another class when medically capable.

c. Students attending NCOES, NCO functional and NCO level reclassification courses will be weighed-in/taped in accordance with (IAW) AR 600-9 for compliance with Army height and weight standards at the beginning of each course. Soldiers that are TDY en-route will be screened prior to departing their home station/losing command. Their height and weight data will be recorded on their TDY orders (DD Form 1610, block 16) or on their permanent change of station packet. Soldiers exceeding the screening table weight in table 1 will not be allowed to depart until their commander has determined they meet Army body fat composition standards. Students arriving at schools not meeting the standards, will be denied enrollment in the course or phase and returned to their unit.

d. Students with temporary profiles that prohibit full participation in the completion of course requirements will be denied enrollment. Students will not be sent to or enrolled in

NCOES courses holding a temporary profile (except for shaving or non-performance deterring profiles), or if they are pregnant, unless the soldier's attending physician provides written documentation that states the soldier can perform/participate in all course physical performance requirements. This includes APFT, marching, and field training exercises. Soldiers will also not be allowed to attend NCOES courses during the recovery period that follows the end date of a temporary profile. Active duty/AGR soldiers holding a permanent P3/P4 profile must arrive for training with a signed copy of their Medical Review Board. Reserve Component (RC) soldiers must possess a complete copy of their DA Form 3349 to be enrolled. Soldiers with a permanent profile will be allowed to attend professional development courses and train within the limits of their profile provided they can otherwise meet all course prerequisites and graduation requirements. The NCOA commandant may dismiss a soldier from a course or refuse to enroll a soldier in NCOES whenever they determine that due to a soldier's permanent or temporary profile restrictions, the soldier would not be able to complete 100 percent of the course requirements to Army/course minimum standards. (For example, APFT, FTX, lanes training exercise (LTX), wear load bearing equipment, perform evaluated performance tasks, etc.)

e. An APFT is not required for enrollment or graduation at Phase II ANCOC or BNCOC, or at MOS reclassification courses/training. Soldiers will not be required to take an APFT during these courses. Therefore, no APFT entry is required for DA Form 1059 completion purposes for these Phases/courses.

Lesson Plan, POI, CMP.

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Standard 33 Reference Excerpts

AR 350-41, paras 9-2f(5)&(10).

(5) Ensures record APFT is part of leader development school programs of PLDC, BNCOC, ANCOC, Battle Staff NCO Course, First Sergeant Course (FSC), Sergeant Major Course (SMC), Senior Warrant Officer Training (SWOT), Officer Basic Course (OBC), Officer Advanced Course (OAC), Combined Arms and Services Staff School (CAS3), and Command and General Staff Officer Course (CGSOC).

(10) Maintains statistical data on the physical fitness performance of soldiers in initial entry training (IET) and military personnel in resident training courses and develops reporting systems as appropriate.

AR 351-1, para 1-13, Physical fitness and weight standard.

a. Soldiers attending professional development courses must meet physical fitness and weight standards outlined in AR 350-15 and AR 600-9. Soldiers over weight will be administered medical screening at local installations.

b. Students shown in the categories listed below must undertake remedial training and retesting before completion of the training cycle or course should they fail to attain minimum standards on the initial physical fitness test.

1. Trainees in an officer candidate course (OCC) or the Warrant Officer Entry Course (WOEC).
2. Officers undergoing their branch basic courses.
3. Personnel in resident training courses 8 weeks or longer.

c. Individuals who attain the minimum acceptable score on each event and an overall passing test score will be graduated.

d. Those who fail to achieve the minimum passing score when retested will be recycled or considered for appropriate administrative action. The Academic Evaluation Report (DA Form 1059/1059-1/ 1059-2) cited in paragraph 1-12 will indicate that the soldier is a non-graduate. The reason for the non-graduate status will be annotated as failure to successfully pass the physical training test or meet the weight standards of AR 600-9. USAR personnel, other than those an IADT status, will be governed by AR 140-1.

e. Physical fitness and weight standards do not apply to foreign students. These students may participate in physical fitness programs on a voluntary basis. Failure to achieve the minimum passing score on the physical fitness test will not be noted on the academic report. Voluntary participation and passing test score may be noted.

AR 351-1, para 5-16, Primary leadership development course (PLDC).

a. PLDC is a non-MOS specific 4-week leadership course conducted at regional NCOA's in CONUS and overseas. The course length may not be altered without the written permission of Cdr, TRADOC ATTN: ATTG-I, FT Monroe, VA 23651-5000.

AR 351-1, para 5-18, Basic Noncommissioned Officer Course (BNCOC).
BNCOC provides tactical, technical, and leader training to prepare NCOs at the squad leader, section leader, tank commander, or weapons system leader level to lead and train soldiers. All BNCOCs are conducted in a live in learning environment.

a. Combat Arms BNCOC are taught in regional NCOA's as shown in table D-3.
1. Course length varies by MOS. Local commanders are permitted to conduct a 1 week add on to the POI for the purpose of addressing unique unit requirements.
2. Prerequisites for selection are listed in DA Pam 351-4 and paragraph 5-14 this regulation.
3. SGTs and SP/4(P)/CPL(P) must be either AC or RC PLDC graduates and serve in the unit a minimum of 6 months between PLDC completion and a BNCOC class start date.
4. Graduates will be given the NCO education code "W" in item 42 of DA Form 2 (Personnel Oualification Record-Part 1).

c. Candidates must meet the physical fitness and weight standards outlined in AR 350-15 and AR 600-9.

d. BNCOC-RC is conducted by ARNG State academies and USARF schools. Prerequisites for BNCOC-RC are listed below. State adjutants general and CONUSA commanders may establish additional requirements. Candidates must-
(1) Be a member of the RC.
(2) Be in the grade of SGT or SSG. A waiver will not be considered.
(3) Be able to demonstrate technical and tactical skills
(4) Be recommended by unit company commander.

Meet weight and physical fitness standards outlined in AR 350-15 and AR 600-9. (Note. The above prerequisites may not be amended by local requirements.)

AR 351-1, para 5-20, Advanced Noncommissioned Officer Course.
a. Advanced Noncommissioned Officer Course (ANCOC) is conducted in a live in environment at NCOA's co-located with the proponent service school. Course lengths vary by MOS.

b. Personnel to attend ANCOC's are-
1. Selected by a DA board for AC personnel.
2. Centrally managed by MILPERCEN (DAPC-EPT-FN).

c. ANCOC selection and eligibility are shown below.
1. The SFC/ANCOC Selection Board will evaluate personnel for attendance.
a. Time-in-grade criteria will be announced by MILPERCEN (DAPC-MSP) before each board convenes.
b. Individuals selected for ANCOC will attend the course.

2. Personnel selected for promotion to SFC who have not previously attended ANCOC will be scheduled to attend the course.

d. Candidates must meet the physical fitness and weight standards outlined in AR 305-15 and AR 600-9. Soldiers over 40 must complete medical screening at the local installation before attending ANCOC. The soldier will hand carry a copy of the medical screen with results to the service school. Other requirements, such as physical examinations and security clearances, are discussed in DA Pam 351-4.

e. The Advanced Course for RC NCO's is taught in USARF schools and ARNG NCOA's.

f. Prerequisites for ANCOC/RC are listed below. State adjutants general and CONUSA commanders may establish additional prerequisites. Candidates must-

1. Be a member of the RC.
2. Be in the grade of SSG or SFC; waivers will not be considered.
3. Be able to demonstrate technical and tactical skills.
4. Be recommended by the unit commander.

Meet height, weight, and physical fitness standards outlined in AR 350-15 and AR 600-9.
Note. **Above prerequisites may not be amended by addition of local requirements.**

AR 351-1, para 5-33, Profiles.

a. Soldiers with temporary profiles that prevent full participation in a course will be removed from order of merit lists by their immediate commanders until the temporary profile is removed.

b. Soldiers who have permanent (Category II) profiles are eligible to attend appropriate NCOES courses. They must meet course prerequisites up to the limits of their profile.

c. Soldiers who have permanent (Category III and IV) profiles must have been before a medical screening board prior to attending NCOES. Soldiers who have not been medically screened and classified with appropriate limitations will not attend courses. (Commander certification may be valid in exceptional cases.) Soldiers who have been before a medical screening board, awarded medical limitations, and allowed to retain their MOS will be eligible to attend appropriate NCOES courses and required to meet course prerequisites up to the limits of their profile.

AR 614-200, para 8–15, Drill sergeant candidate prerequisites.
a. Drill sergeant candidates are AA and USAR/ARNGUS soldiers who—
(1) Expend Government funds in compliance with AA and USAR/ARNGUS DS school/assignment orders.

(2) Have reported to DS school but were already assigned to the DS school installation when selected for the DS Program.

b. Drill sergeant candidates must meet the following prerequisites:

(1) Be physically fit (maximum profile guide is 111221), meet body composition requirements in AR 600–9, and be able to pass the APFT (no substitution of events) upon arrival at DS school.

(2) Be 36 years old or less. However, volunteers may be 37 years old or older provided they have the appropriate medical clearance (see AR 40–501) at the time of request. Medical clearance should state that soldier is medically cleared for DS duty.

(3) Have no record of emotional instability as determined by screening of health records and clinical evaluation by competent mental health officer.

(4) Have no speech impediment.

(5) Be a high school graduate or possess the GED equivalent.

(6) Be a graduate of BNCOC.

(7) Display good military bearing.

(8) Have demonstrated leadership ability during previous tours of duty and have demonstrated capability to perform in positions of increasing responsibility as Senior NCO in the Army, as reflected on the NCOERs.

(9) Have had no court-martial convictions.

(10) Have no record of disciplinary action or time lost under 10 USC 972 or letter of reprimand filed in OMPF during current enlistment or in last five years, whichever is longer (does not include Article 15 directed for filing in the restricted portion of the OMPF).

(11) AA soldiers may not have received EB or SRB for current service obligation if PMOS is not among those authorized for DS positions.

(12) Have a minimum GT score of 100.

(13) Have qualified with M16A2 rifle within last six months.

(14) Be SSG through SFC (not applicable to USAR/ARNGUS soldiers) (not applicable to DS school first sergeant positions).

(15) Have a minimum of four years continuous active Federal service.

(16) Have a commander's evaluation by a LTC or higher.

(a) A Commander's Evaluation Form and a DA Form 3822 will be forwarded to the commander (LTC or higher) of DA selected soldiers. These forms must be completed and returned within 14 calendar days to PERSCOM DS Assignment Team (TAPC-EPK-ID).

(b) All DS volunteers must request and return a completed copy of the Commander's Evaluation Form and a DA Form 3822–R with their

application. These forms may be obtained from PERSCOM DS Assignment Team (TAPC-EPK-ID).

(c) Commander (LTC or higher) will personally interview the soldier (this may not be delegated) and ensure soldier meets prerequisites. Commanders will consider the "whole soldier" when making their recommendation. Input should include, but is not limited to, demonstrated leadership ability and potential; physical fitness; character/integrity; the soldier's ability to perform in stressful situations; any incidents of abuse that the chain of command is aware of. All negative evaluations must include a full explanation.

(17) Have a thorough background screening conducted by PERSCOM. Soldiers with Type I reports of unfavorable information disqualifiers will be excluded from DS duty permanently. Soldiers with Type II reports of unfavorable information disqualifiers will be excluded for consideration for DS duty for five years from the date of the incident.

(18) Type I reports of unfavorable information disqualifiers (automatic rejection):

(a) Sexual harassment; assault of a subordinate, spouse, child; rape; or indecent acts with minors.

(b) Incest, bestiality, adultery, sexual activity with subordinate soldiers, or fraternization.

(c) Conduct in violation of the Army's policy on participation in extremist organizations or activities.

(d) Any court-martial conviction in the soldier's career, provided it has not been reversed by a higher court or other appropriate authority.

(e) Any repeat offenders (or combination) of Type II offenses (see para 8–15b(18)(a) through 8–15b(18)(e)) anytime during soldier's career.

(19) Type II reports of unfavorable information disqualifiers (time related—any record of unfavorable information below committed within five years of DS consideration):

(a) Driving under the influence (DUI).

(b) Assault (other than subordinate, spouse, or child).

(c) Any drug offense.

(d) Larceny/theft.

(e) A traffic violation with six points or more assessed.

(20) Other disqualifiers—Any record of unfavorable information other than the above in the past three years.

(21) PERSCOM will screen/coordinate the following records for all potential DS candidates based on criteria listed in paragraph 8–15b(17) through 8–15b(19):

(a) Department of the Army Inspector General's (DAIG) records.

(b) Personnel security and criminal records indexed in the Defense Clearance Investigations Index (CDII) as present in the Army Investigative Records Repository (AIRR), Army Crime Records Center

(ACRC), the Defense Security Service (DSS), and other Federal agencies and military departments—Central Clearance Facility (CCF).

(c) OMPF restricted files—Enlisted Records and Evaluation Center (EREC).

(d) Community and Family Support Center (family advocacy) records.

(22) Soldiers who are disqualified for DS duty based on background screening will be notified via PERSGRAM. The PERSGRAM will include where the disqualification information was found (see para 8–15b(20)) and provide the agency's address. The PERSGRAM will be sent via mail to the soldier's unit address. The soldier will be informed that he/she may request appeal of the decision by addressing a written appeal to CDR, PERSCOM (TAPC-EPC-S), Enlisted Background Screening Section, 2461 Eisenhower Avenue, Alexandria, VA 22331. The appeal request must be endorsed by the first GO in the chain of command. The Director, EPMD, may request decision from the CG,
PERSCOM, or the DCSPER, when warranted.

c. U.S. Army Reserve soldiers may have the following waived:

(1) Noncommissioned Officer Education System BNCOC requirement. (Soldier must be a Primary Leadership
Development Course graduate.)

(2) Time-in-service requirement reduced to three years.

(3) Rank to CPL. (However, to attend AA DS school, soldier must be a prior-service training candidate appointed as
an acting SGT. (See AR 140–158.))

TR 350-16, Ch 2.

Chapter 2
Administration

2-1. Entry into the DSP.

a. In accordance with AR 614-200, soldiers may volunteer or be selected by Department of the Army (DA) for DS duty.

b. All drill sergeant candidates must meet the requirements outlined in AR 614-200, paragraphs 8-15 through 8-17.

c. Drill sergeant candidates are noncommissioned officers (NCOs) identified and notified by PERSCOM that they are scheduled to attend DSS and will be assigned against a DS personnel requisition. Candidate status will not begin more than 45 days prior to their class start date.

2-2. Entry into the RC DSP.

a. Qualified RC personnel may enter the program by either volunteering or enlisting for DS vacancies in the RC training divisions. The RC DSC must meet the prerequisites of AR 614-200 to qualify for the program. They will attend either the DSS of the division to which they are assigned or an AC DSS. All candidates will be graduates of the Primary Leadership Development Course prior to attending DSS. Prior service personnel, who were instructor-qualified in the Navy, Marines, or Air Force, must still go to the required AC or RC DSS.

b. All RC personnel, sergeant (SGT) through sergeant first class (SFC), who complete DSS and are assigned to a training unit, will be awarded the SQI "X."

c. Reserve Component candidates in rank SGT through SFC may volunteer and be selected for attendance at an AC DSS. When a RC candidate is selected to attend an AC DSS, direct coordination between the DSS commandants is authorized. Candidates must have the required uniforms and adequate funds to cover expenses during the period of training.

d. Reserve Component may have the following waived:

(1) Basic Noncommissioned Officer Course requirement.

(2) Time-in-service requirement reduced to 3 years.

(3) Rank to corporal (however, to attend AC DSS, soldiers must be appointed as an acting SGT (AR 140-158)).

2-3. Drill Sergeant School Course Program of Instruction.

a. The DSSC POI, which is approved by Commander, TRADOC, is directive in nature. Do not implement deviations from the POI without the written approval of Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, Fort Jackson, SC 29207-5315.

b. Policy. The USATC and Fort Jackson Drill Sergeant Proponent Program will act as the proponent and approval authority for the content and execution of the DSSC. The DSPP is responsible for updating and evaluating the POI.

c. The course will be conducted IAW the DSSC POI, with small group instruction (squads consisting of 8 to 20 assigned candidates). The DS leaders will lead and instruct their squads throughout the course (two DSLs per squad).

d. Drill Sergeant School commandants will monitor the execution of the POI and report candidate attrition during each class using TRADOC Form 350-R (Drill Sergeant Course Performance) (RCS ATTG-35 (R2)). Instructions for completion are on the back of the form. (See app B for additional information.) The DSS commandants will also conduct a

complete review of any course with an overall attrition over 12 percent, to determine causes. This review is a tool for quality control and product improvement and is not to be used as an attempt to lower the standards. Forward the analysis, along with TRADOC Form 350-R, to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315, and Commander, TRADOC, ATTN: ATTG-X, 11 Bernard Road, Fort Monroe, VA 23651-1001.

e. Procedures for submitting and recommending changes to DSSC material. Submit all recommendations to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315 for review/approval.

2-4. New-start program (AC and RC).

a. Commandants will not new-start candidates who fail to achieve course standards without prior approval/coordination from Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, Sumter Street, Fort Jackson, SC 29207-5315, and DA PERSCOM, ASTAPC, ATTN: TAPC-EPK-ID, 2461 Eisenhower Avenue, Alexandria, VA 22331-0452. Send the request for new-start through DSPP office to PERSCOM (the approval authority for new-starts). The recommendation to new-start a candidate for failing to achieve course standards will be granted on a **one-time only** basis. If the reassignment is made and the candidate still fails to achieve the standards, the commandant will remove the candidate from the DSSC IAW this regulation and AR 614-200.

b. Complete all new-start reassignments, regardless of circumstances, within 60 training days for AC and 6 months for RC. Soldiers who experience difficulty in one course area, but are otherwise exceptional and maintain motivation, may be new-started on an exception basis. Commandants must decide to new-start a candidate before the candidate is given a one-time only fourth attempt. After using a fourth (final) attempt, no new-starts are permitted. Reassignment will be made to the first available class (AC or RC) where the candidate has the opportunity to continue from the necessary block of training. The intent is to have the candidate back into training as soon as possible from the time the decision is made.

c. Candidates who have missed training due to emergency leave or hospitalization, and will not be able to complete the course with the initial class, will be new-started to the next available class. If this reassignment is not completed within 60 training days for AC and 6 months for RC, the commandant will release the candidate IAW AR 614-200 and this regulation (administrative release).

d. Reserve Component (RC) DSC, who are unable to attend two annual training (AT) periods due to a conflict (e.g., civilian job, civilian school, etc.), can be new-started. However, the DSSC will be completed within 18 months. These circumstances will be handled on a case-by-case basis and must be approved by Commander, USATC and Fort Jackson ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

e. Candidates will not be new-started for failing their final attempt on the Army Physical Fitness Test (APFT).

2-5. Relief of DS candidates from the Drill Sergeant School Course.

a. Drill sergeant candidates may be removed from the DSSC without being removed from the DSP. Candidates removed from the course may be considered for DS duty in the future and may be given a new DSS class date.

b. Drill Sergeant School commandants are designated as the approval authority to remove candidates from the DSSC, provided they are not recommended for removal from the DSP. All adverse academic evaluation reports (AERs) must be referred or forwarded in memorandum with student acknowledgement. The endorsement must indicate the candidate's intent with regard to appeal.

c. Installation, U.S. Army Training Center, separate brigade and/or appropriate equivalent commanders may remove Active Army soldiers from the DS Program (while in candidate status or while assigned DS duties). Removal authority must be at least colonel level command and may be delegated to subordinate commanders or deputy commanders/commandants in the grade of colonel or higher including commanders/commandants of other Services. Policy governing relief from DS duty for USAR soldiers is contained in AR 140-10. Removal may be for any of the following reasons:

(1) Arriving unqualified to DS school (soldiers that do not meet the course prerequisites, including body composition requirements in AR 600-9).

(2) Failure to pass the APFT. (See AR 350-41.)

(3) Academic failure (DS school).

(4) Temporary medical reasons that will prevent soldier from completing the DSSC in the specified time.

(5) Administrative (emergency leave, etc.).

(6) Failure to maintain high standards of military appearance, military courtesy, bearing, conduct and/or professionalism, including noncompliance with body composition requirements in AR 600-9 and testing positive for drugs.

(7) Infractions of training policies or violations of the Uniform Code of Military Justice (UCMJ).

(8) Lack of proper motivation, provided individual counseling has been unsuccessful, including failure to enter or complete DS school.

(9) Medical reasons, including pregnancy, when condition prevents soldier from performing DS duties.

(10) Hardship or family problems that prevent soldier from performing DS duties.

d. Procedures for removal action:

(1) The DSS commandant will evaluate all candidates recommended for removal from the DSSC (can be delegated to the satellite schools in RC). In cases where the commandant determines that removal is warranted, the following procedures apply:

(a) The DSS commandant will notify the candidate in writing of the proposed action, basis for the action, consequences of disenrollment, and right to appeal. Candidates must submit an appeal within 48 hours for AC and 30 days for RC after receipt of written notification. If RC candidates attend an AC school, the AC rule for appeals applies.

(b) The DSS commandant will receive an endorsement from the candidate that acknowledges a counseling session was held and an elimination notice was received. The endorsement also must indicate the candidate's intent with regard to appeal.

(c) All adverse AERs must be referred to the student with memo for acknowledgement and comment.

(d) The reviewing authority for cases regarding appeals will be the approval authority for removal from the DSP. The DSS commandant will review all appeals for accuracy and formatting, before sending the removal packet to the approval authority, IAW 614-200. After the appeal packet is completed, the commandant will forward the entire packet to the approval authority. If a DSC is being processed for both removal from the DSSC and the DSP, the commandant will execute the DSC removal and then refer it to the Training Center Commandant with the recommendation that the DSC be removed from the DSP IAW AR 614-200, paragraph 2-6.

(2) Intermediate levels of command will not delay the recommendations from reaching the approval authority. No more than 72 hours will lapse between transmittal of recommendation by the commandant and receipt by the approval authority. Candidates should remain in training until the approval authority notifies the commandant of the final decision. Candidates can be removed from training if they are disruptive and interrupt an environment conducive to learning, or have elected not to appeal the dismissal.

(3) Active Component NCOs, who are removed from the DSSC, will be returned to their unit.

(4) When a RC DS candidate is removed from an AC DSS, the AC DSS commandant will initiate a DA Form 1059 IAW AR 623-1 and notify the candidate's division. When matters of judicial or nonjudicial punishment are involved, the AC

commander with jurisdiction should consult with the candidate's commander to coordinate actions being pursued.

(5) The DSS commandant will notify the unit CSM of each candidate's removal from the DSSC/DSP. A letter from the approval authority will specify the reasons for removal.

(6) The commandant will submit a copy of the removal packet for every candidate being removed from the DSSC/DSP to PERSCOM, ATTN: TAPC-EPK-ID, 2461 Eisenhower Avenue, Alexandria, VA 22331 IAW 614-200, paragraph 8-18, and Commander USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

e. Appeals process:

(1) The appeal and reinstatement approval authority for DS removed from the DS program will be no lower than the first general officer in the soldier's chain of command and will always be a general officer higher in grade than the designated removal authority.

(2) Appeals to DS removal actions must be acted upon, and final decision provided to PERSCOM (TAPC-EPK-ID), within 20 calendar days from the date of the soldier's removal from the DS program. An appeal that is not acted upon within the allotted time period must be forwarded to the Commanding General (CG), PERSCOM, for action. Appeals that must be acted upon by the CG, PERSCOM, as indicated in paragraph 8-18j, must be submitted to the CG, PERSCOM, within 20 calendar days of the date the soldier was removed from the DS program.

f. A candidate's failure to complete the DSSC, in 45 academic days, will result in academic removal, IAW the DSSC POI.

g. The RC DSSC must be completed within 18 months. All course requirements must be met by DS scheduled class graduation date.

h. Medical removals will be made in cases of illness, injury, or a medical profile that results in unreasonable delays in training or loss in training time. The DSS commandants will determine if the candidates have the potential to make up the missed training. All course requirements must be met by the scheduled class graduation date.

2-6. Relief of DS candidates from Drill Sergeant Program.

a. Drill sergeant candidates may be removed from the DSP for cause before or during DSS. Candidates removed from the DSP will not be considered for DS duty in the future. Reasons for

removal and report procedures are established in AR 614-200 and this regulation.

b. Army training center/RC training division commanders are designated as the approval authority to remove RC DSC from the DSP. This authority may be delegated to subordinate commanders in the rank of colonel or higher with removal authority.

c. The approval authority will promptly review the circumstances of the case and decide upon the candidate's removal from the program IAW AR 614-200. The entire action, from submittal by the DSS to the disposition by the approval authority, will not exceed 5 training days. Active Component NCOs, who are removed from the DSP, will be returned to their unit.

d. The DSS commandant will notify the unit CSM of each candidate's removal from the DSSC/DSP. The approval authority will make notification through a letter, specifying the reasons for removal.

e. The commandant will submit a copy of the removal packet for every candidate being removed from the DSSC/DSP to PERSCOM, ATTN: TAPC-EPK-ID, 2461 Eisenhower Avenue, Alexandria, VA 22331 IAW 614-200, paragraph 8-18, and Commander USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

f. Urine testing of AC/RC DS candidates. Commandants will administer a 100 percent urinalysis test to DSS candidates. The test will be administered within 3 training days after reporting to the DSS. The specimens will be collected and processed IAW AR 600-85 and U.S. Army Drug and Alcohol Operations Agency standing operating procedure. Soldiers performing DS duties or in DSC status, whose urine test is confirmed positive, will be removed from the DSP IAW AR 614-200.

2-7. **Assignment and use of DS candidates.**

a. Unit commanders are responsible for ensuring that the DSC has no issues that would prevent successful completion of DSS (i.e. personal, financial, or medical). If in the opinion of the unit commander, the DSC is not prepared to attend DSS as scheduled (e.g., prospective APFT failure, a limiting physical profile, overweight, etc.), the commander will arrange for class deferment with the Post DS Strength Manager. The commander will determine if the candidate should be eliminated from the DSSC/DSP, if the candidate is still not prepared to attend the next available class.

b. Installation commanders have the option to assign a DSC to a training unit. During their assignment, the following requirements will be met:

(1) Drill sergeant candidates, both AC and RC, will be assigned a DS sponsor who will help prepare the candidate for DSS and monitor their activities in the unit. The DSC will spend the maximum amount of time preparing for DSS, closely observe unit training, and participate in as many training activities as time allows. The sponsor will ensure that DSC obtain/attend the appropriate certification requirements applicable to

the installation before attending DSS (e.g., driver's safety, range safety, etc.). The sponsor will continually check the candidate's progress while in DSS.

(2) At no time will DSC be placed in positions where they are allowed total control of and/or assume responsibility for initial entry training (IET) soldiers. This includes, but is not limited to, marching soldiers, counseling soldiers, or acting in the capacity of primary instructor. Furthermore, the DSC will not be used in the following capacities; however, the DSC may accompany a drill sergeant (sponsor) in the performance of these duties:

(a) Charge of quarters.

(b) Staff Duty NCO.

(c) Sergeant of the guard.

(d) Commander of the relief.

(e) Kitchen police pusher.

2-8. Relief of drill sergeant from DS duties.

a. Army Training Center commanders/service school commandants, and brigade commanders in the grade of O-6 or higher are authorized to remove DS from DS duties. Specific reasons for removing DS from their duties and the DSP, and withdrawing the SQI "X" are contained in AR 614-200, paragraph 8-18. Army Training Center/Reserve Component training division commanders are designated as the approval authority to remove a RC drill sergeant from the DSP. This authority may be delegated to subordinate commanders in the rank of colonel or higher with removal authority.

b. Drill sergeants removed from the DSP may also lose the award of the "X" identifier if removed for disciplinary reasons. They will be restricted from wearing the DS patch. All appeals will be made to the DSPP and Chief of Staff for Personnel. Appeals will reach the DSPP within 14 days.

c. Drill sergeants removed from DS duties for cause, except for medical reasons to include illness or injury, will be reassigned to other duties that do not include contact with IET soldiers. Further guidance, regarding disposition of DS suspended from DS duties, will be found in AR 614-200, paragraph 8-18.

2-9. Assignment and use of DS.

a. Active Component and RC DSS graduates assigned in DS positions are authorized Special Duty Assignment Pay (SDAP) (to include RC performing DS duties on active duty for training and inactive duty training missions). Drill sergeants on status will be assigned and used only in authorized DS positions. Drill sergeants will not perform

major additional duties that divert them from their primary duty of a DS. Additional company duties such as nuclear, biological, chemical NCO, physical security NCO, and equal opportunity representative (EOR) are authorized.

b. If a DS is put in a non-DS position, SDAP will be lost for the length of time spent in the non-DS duty position.

c. If for a period not to exceed 90 days, a unit does not have a first sergeant (1SG) assigned, a DS may be temporarily appointed to act in the 1SG position. However, in order for the DS to continue to receive SDAP, they must maintain their primary position as a DS.

2-10. Annual DS certification. Drill sergeants, assigned to BCT/OSUT units, will be evaluated and certified annually on all hands-on phase tasks listed in Supplement 1 of the BCT POI 21-114. The DS, assigned to AIT units, will be evaluated and certified annually on those common tasks selected for reinforcement training and evaluation in AIT, listed in TRADOC Reg 350-6. In addition, DS will be certified whenever changes are made to the BCT/AIT/OSUT POI. The IET cadre may be used to administer the certification.

2-11. Drill sergeant assignment ratios. TRADOC installations will be resourced DS requirements based on the following:

a. Basic combat training/OSUT. Twelve DS per company (3 per platoon) in order to sustain ratio within range of 1:17-20. Resourcing computations consider course length plus two weeks.

b. Advance individual training. Ratio for AIT is 1:30. Resourcing computations consider course length plus one week. Although the AIT ratio is 1:30, units/companies must maintain as a minimum two DSs per unit/company.

c. Drill Sergeant School. Staffing for DSLs will be IAW the Instructor Manpower Model.

d. Pre-Command Course/Cadre Training Course. Noncommissioned officers, who have come off DS status within one year, should be used for this requirement.

2-12. Reporting requirements. The DSP POC, at each DSP installation, must submit a monthly report to Commander, TRADOC, ATTN: ATBO-BE, 5 North Gate Road, Fort Monroe, VA 23651-1048, using TRADOC Forms 603-R (Active Army Drill Sergeant Report) and 603-1-R (Active Army Drill Sergeant Report by Grade and MOS (RCS ATBO-20 (R4)). See appendixes D and E for information on completing these forms. The ending period of the report will be the last calendar day of each month. The report must arrive at TRADOC HQ no later than (NLT) the 10th of the month, following the ending period date. Negative reports are required.

2-13. Drill Sergeant School organization.

a. All TRADOC schools approved by CG, TRADOC, teaching the approved DSSC POI, and accredited by the Drill Sergeant Program Proponent office, will be titled as a "Drill Sergeant School."

b. The DSS can be part of a Noncommissioned Officer Academy (NCOA), where authorized. Exceptions to this policy must be submitted to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315, for review and approval.

c. The chief instructor (CI) position will be filled by a first sergeant/master sergeant who is DS-qualified. When the DSS is not collocated under an NCOA, a DS-qualified individual will fill the commandant and chief instructor.

d. Female DS authorizations for DSS are shown in table 2-1. Career Management Field for female DSS will be from CMF authorized on the installation.

Table 2-1

Number of Female DS minimum authorizations for DSS

SCHOOL	AUTHORIZATION
Fort Benning	2 each
Fort Jackson	4 each
Fort Leonard Wood	4 each

2-14. Training assistance and support for RC DSS.

a. In the interest of providing continuing support to RC DSS, TRADOC CG has established an affiliation between training division DSS and specific AC DSS. These affiliations (table 2-2) represent geographical considerations and include capstone mission where possible.

b. Specific benefits of these affiliations include:

(1) Drill sergeant leader training. The RC commandants may request a mobile training team (MTT) to assist in DSL training.

(2) Staff assistance visits. The AC DSS commandants are encouraged to visit RC DSS during their training and provide comments and recommendations to the RC commandants.

Table 2-2

AC/US Army Reserve (USAR) DS Affiliates

AC SUPPORT	RC AFFILIATE	HOME LOCATION	MOB STATION
Fort Benning	95th 9;	**9;** Oklahoma	Fort Sill
	104th	City,OK	Fort Bliss
		Vancouver, WA	
Fort Jackson	80th		Fort Gordon/FLW
	108th	Richmond,	Fort Jackson
		VACharlotte, NC	
Fort Leonard	84th		Fort Benning
Wood	98th	Milwaukee, WI	Fort Leonard Wood
	100th	Rochester, NY	Fort Knox
		Louisville, KY	

c. Send a copy of all MTT After Actions Reports that require USATC and Fort Jackson's assistance, (e.g., shortages of required equipment, personnel, etc.) to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

2-15. Drill sergeant military occupational specialty (MOS) structure. The DS MOS structure and assignment of DSs at TRADOC installations follows (not for reserve):

a. In BCT, 33 percent of DS requirements/authorizations will be from CMF 11; 17 percent will be from other combat arms (CA) MOS; 25 percent will be from combat support (CS) MOS; and 25 percent will be from combat service support (CSS) MOS. Installations that conduct BCT are authorized a minimum of two and up to four female DSs in each training company to include the Fitness Training Unit (FTU) and Reception Battalion.

b. In AIT, 100 percent of the DS requirements/authorizations will be from the CMF being trained. When the Army provides a CMF/MOS to females, installations can document their table of distribution and allowance (TDA) for female positions with any available MOS until such time that females with the specific CMF/MOS become available for DS duty.

c. In OSUT, (CA and CS MOS's) 100 percent of the DS requirements/authorizations will be from the CMF being trained. In OSUT, (CSS MOS's) will have a DS mix of 67 percent CMF and 33 percent CA DSs, with at least 50 percent of CA mix being infantry. This further breaks down to four CA DSs and eight CMF DSs per company. That is one CA DS per platoon, two female CMF DSs per company and six non-gender specific CMF DSs per company. When the Army provides a CMF/MOS to females, installations

can document their TDA female positions with any available MOS until such time that females with the specific CMF/MOS become available for DS duty.

d. Army Training Center commanders will determine the DS CMF structure within (FTUs) and reception battalions, using MOS authorized at their installation and the approved TRADOC staffing guidance for Reception Battalions/FTU.

e. Code the Personnel Identification (PERS Column "I" (interchangeable)) on the authorization document for all non-CA MOS.

TR 350-18, para 3-25.

3-25. Enrollment and attachment.

a. The soldier's unit commander will ensure all soldiers, including walk-ons, enrolled in institutional training meet course prerequisites. Soldiers reporting for training must have in their possession a completed and properly signed pre-execution checklist. The purpose of the pre-execution checklist is to assist the unit in preparing soldiers for school attendance, while providing one single document, with appropriate attachments, for the training institutions. This checklist will be completed by appropriate unit personnel and verified and signed by the unit commander. Soldiers reporting for training without the checklist, signed by the soldier and unit commander, will be given 72 hours from the report date to provide the checklist with appropriate attachments. Soldiers attending IDT courses will be given until Saturday of the second multiple unit training assembly (MUTA)-4. After this time, soldiers will be returned to their unit. The pre-execution checklist is a pre-enrollment requirement for all TASS courses/institutions except OCS, CCC, CGSOC, and the resident sergeant major (SGM) course. The pre-execution checklist will be used to verify routine prerequisites such as line scores, physical capacity or stamina, upper extremities, lower extremities, hearing, ears, psychiatric (PULHES), and DA Form 1059. The unit commander can further certify the completion of prerequisite testing/evaluation (i.e., typing test). Documentary evidence of security clearance, physical profile and other non-routine prerequisites are required in addition to the pre-execution checklist. The unit commander's signature on the pre-execution checklist will suffice as certification that the soldier meets routine course prerequisites (as stated above) IAW all requirements of the course as listed in DA Pam 351-4, and the ATRRS prerequisite screen. The pre execution checklist is found at appendix H.

b. When a commander releases a student to attend TASS battalion classes, the student will be required to attend all scheduled training. Commanders at all levels will ensure that students meet all course prerequisites and are not removed from training for other duties.

c. Students will be attached, for training only, to the TASS training battalion during IDT/AT. Enrollment for TPU/man-day soldiers is accomplished by the submission of the AATAS through command channels.

d. The commanders will forward AATAS enrollment applications to the appropriate quota manager for soldiers who desire to attend TASS training battalion classes during IDT/AT.

e. Army officers serving in an active status, to include ADT for 179 days or more, may attend TASS training battalion phases of CGSOC in a TDY status.

(1) AC officers should apply for attendance using DA Form 4187 through normal AC channels to the appropriate quota issuing authority (NGB or USARC). The quota will be issued to the approving command responsible for orders. The installation assigned logistical support for the area is responsible for funding. Funds are allocated from P81 (8127861) account.

(2) USAR AGR officers will submit requests for quotas on DA Form 4187 to the USARC (AFRC-OPT-I). The USARC will forward requests to Commander, AR-PERSCOM, ATTN: ARPC-OPM-PD, 9700 Page Avenue, St. Louis, MO 63132-5200, which will issue quotas and provide fund cites to the MUSARC for publication of orders.

f. All IRR/IMA soldiers' requests for ADT phases of TASS training battalion courses and TPU officers' requests for AT/ADT phases of CCC and CGSOC will be forwarded to Commander, AR-PERSCOM, ATTN: ARPC-OPM-PD, 9700 Page Blvd., St. Louis, MO 63132-5200.

g. For IRR officers enrolling in CGSOC, TASS CGSOC battalions will assist applicant to initiate a DA Form 4651-R, IAW AR 140-10. After the form is completed by the officer, the TASS CGSOC Battalion will sign and mail the form to Commander, AR-PERSCOM: ATTN: ARPC-OPM-O, 9700 Page Blvd, St. Louis, MO 63132-5200.

h. Correspondence course students who are academically eligible and meet course prerequisites may apply through appropriate channels to attend TASS AT/ADT phases of CGSOC.

TR 350-10, Ch 2.

Chapter 2
Leader Training and Education Guidelines

2-1. General. This chapter contains general policies and administrative procedures for officer (to include precommission), warrant officer (to include preappointment), NCO, and civilian leader training and education.

2-2. Institutional training.

a. Institutional leader training and education goals. Leader development goals and leader duties, missions, and responsibilities at specific organizational levels form the basis of learning objectives designed to—

(1) Produce leaders who have the ability to execute doctrine and strategy.

(2) Develop leaders capable of planning and executing worldwide peace and wartime missions in a wide range of operational environments.

(a) Plan and execute independent operations within commander's intent, show initiative, take calculated risks, and exploit opportunities.

(b) Develop and implement flexible operational plans, readily understood by all, which provide purpose, direction, and motivation.

(c) Effectively integrate advanced technology with the human dimension to demonstrate tactical and technical competence in building cohesive teams.

(3) Provide progressive and sequential training that prepares leaders for future operational assignments.

(4) Incorporate doctrine and strategy changes, as they occur.

(5) Provide vertically and horizontally aligned training products for institutional, unit, and self-development training.

b. Course content. Course content is based on leader training goals and objectives, as well as duties, responsibilities, and missions to which graduates will be assigned.

(1) Tasks. Course tasks are the individual leadership, technical, and tactical tasks leaders must perform to successfully accomplish specific duty position requirements. Individual tasks will not be trained in isolation, but will be combined with other tasks to reflect the reality of operational environments.

(2) Conditions. Tasks will be trained and evaluated under conditions approximating operational environments for projected peacetime and wartime missions. During training, students will be exposed to frequently changing and progressively more difficult conditions. Small group leaders (SGLs)/instructors will insert realistic situational challenges which require progressively higher performance levels.

(3) Standards. Performance standards will equal or exceed requirements for successfully performing tasks or related missions in an operational wartime environment. Standards will include requirements for students to rapidly grasp changes in situations and conditions. Standards will also require students to exercise initiative by

independently planning and/or executing doctrine-based actions within commander intent that steadily focus on the assigned mission.

c. Functional courses. Functional training provides skills required for operational assignments. Award of a skill identifier, additional skill identifier (ASI), or special qualification identifier (SQI) code usually recognizes functional course completion.

d. The Army Training System (TATS) Course. All components will use TATS courseware developed per TRADOC Reg 350-70.

2-3. Selection. Commanders will adhere to the requirements found in ARs 140-158 and 350-1 for the selection process and criteria for attendance at each course. Prerequisites for each course will be published in each school's appropriate Army Training Requirements and Resource System (ATRRS) catalog. Insuring soldiers meet established course qualifications and prerequisites is an individual and unit commander responsibility. Commanders will use the automated preinspection checklist posted in ATRRS, which is the Army's system of record to be used to validate a soldier's training qualification status. Soldiers arriving at schools not meeting these requirements will be denied enrollment and returned to their unit.

2-4. Student orientation. Commandants and/or TASS training commanders will post their student orientation information under their respective school codes to the school header (SH) screen in ATRRS. Information will be kept current at all times. Units and students may now access the student orientation material on the ATRRS homepage. (Note: DA Pam 351-4 is no longer current in many cases). If ATRRS access is not available, student information will be mailed to the student's unit no later than (NLT) 45 days prior to the course start date. Student orientation materials will be provided attendees in sufficient time to acquire materials and items required to bring to school when reporting for training. These materials should also be available on the school web site. Upon arrival, commandants will conduct a formal orientation with each class during in-processing. This orientation must include—

a. Course scope/overview and enrollment prerequisites.

b. An explanation of the student's course evaluation plan they will be issued.

c. Providing student orientation materials for students who did not receive their orientation materials prior to arrival.

d. Billeting, mess, financial, and support information.

e. Clothing, equipment, documents, and other items required for course attendance and a listing of prohibited items.

f. Installation and local community information including appropriate e-mail address and telephone numbers.

2-5. Billeting. Installation commanders will make every effort to billet students on post. Students not in a temporary duty (TDY) status will not be required to maintain course-related bachelor officer/enlisted quarters for which the student must pay. NCOES billeting priority is PLDC, BNCOC, and ANCOC. Within local constraints—

a. Students attending PLDC will be billeted at the NCOA the entire course in squad-size bays to keep classes, small groups, and squads together as much as possible.

b. Students attending BNCOC will be billeted in two- to four-person rooms with adequate living and study facilities.

c. Students attending ANCOC will be billeted in one or two-person rooms with adequate living and study facilities. If billeting, as prescribed above, is not available, ANCOC students will be billeted in bachelor enlisted quarters, visiting enlisted quarters, or off post. Note: NCOA commandants may allow locally assigned ANCOC and BNCOC students (those attending who are within a 50 mile radius of their home station) to reside in their local unit or government/

civilian quarters as long as all course leadership roles, performance and academic evaluation requirements/standards can be met.

d. Noncommissioned Officer Education System students will not be billeted with soldiers attending AIT. If billeting in the same building with AIT soldiers is unavoidable, access to respective living areas must be restricted.

e. Adherence to above policy will be reviewed during accreditation visits. Noncompliance will be noted in the initial Quality Assurance (QA) program accreditation report as a higher headquarters issue and documented on the next visit's report as a critical deficiency, if conditions have not improved and no plan has been initiated by the organization to upgrade facilities to meet minimum standards.

2-6. Physical fitness, weight control, and profiles. See ARs 40-501, 350-1, and 600-9, National Guard Regulation (NGR) 40-501 and TRADOC Reg 350-18. All Active Component (AC) and Active Guard Reserve (AGR) officers, warrant officers and NCOs who reach the age of 40 will receive their over 40 physical, to include a cardiovascular medical screening program (CVSP) prior to arrival at OES, WOES, NCOES or functional professional development courses. All other soldiers who have reached the age of 40, whose last periodic physical was within the last 5 years, will receive a CVSP in conjunction with their next periodic physical examination. Per AR 40-501, for over 40 soldiers who **have** had a periodic physical within the last 5 years, there is no need to require a CVSP prior to continuing physical training or participating in APFT. Over 40 soldiers arriving at schools who **have not** had a periodic physical within the last 5 years will be denied enrollment and not be allowed to start the course curriculum. This policy will be included in all proponent developed course management plans per TRADOC Reg 350-70, and included in future editions of the pre-execution checklists found in TRADOC Reg 350-18.

a. School's SGLs/instructors will not be assigned to duty with a profile that precludes them from performing all of their duties (i.e., running, marching, or wearing of required equipment, etc.). Exceptions to this policy are SMC and CSMC SGLs/senior small group leaders (SSGLs), who are not required to conduct student performance or academic evaluations on these tasks as part of the course curriculum requirements.

b. Per DA message R251850Z Jul 01, subject: Clarification and Reinforcement of Army Training Policies, attendees of OES and WOES will pass the Army physical fitness test (APFT) prior to their course graduation date. Noncommissioned Officer Education System and NCO functional course (First Sergeant/Battle Staff Courses) attendees will be administered the standard APFT within the first 72 hours of enrollment. Those who fail this initial test will be given one retest to be administered sometime between academic day 7 and 14. Without exception, students must pass the APFT prior to the end of the course or phase (whichever occurs first) to graduate. BNCOC and ANCOC students must pass the APFT before the end of Phase I (common core). In all cases, soldiers who fail the APFT retest will be dropped/dismissed from the course for failure to meet APFT standards. Soldiers failing the initial APFT and found medically unqualified to retest within the required period of time will receive a medical dismissal, (for non-prejudicial medical reasons), returned to their unit, and allowed to be rescheduled to attend another class when medically capable.

c. Students attending NCOES, NCO functional and NCO level reclassification courses will be weighed-in/taped in accordance with (IAW) AR 600-9 for compliance with Army height and weight standards at the beginning of each course. Soldiers that are TDY en-route will be screened prior to departing their home station/losing command. Their height and weight data will be recorded on their TDY orders (DD Form 1610, block 16) or on their permanent change of station packet. Soldiers exceeding the screening table weight in table 1 will not be allowed to depart until their commander has determined they meet Army body fat composition standards. Students arriving at schools not meeting the standards, will be denied enrollment in the course or phase and returned to their unit.

d. Students with temporary profiles that prohibit full participation in the completion of course requirements will be denied enrollment. Students will not be sent to or enrolled in NCOES courses holding a temporary profile (except for shaving or non-performance deterring profiles), or if they are pregnant, unless the soldier's attending physician provides written documentation that states the soldier can perform/participate in all course physical performance requirements. This includes APFT, marching, and field training exercises. Soldiers will also not be allowed to attend NCOES courses during the recovery period that follows the end date of a temporary profile. Active duty/AGR soldiers holding a permanent P3/P4 profile must arrive for training with a signed copy of their Medical Review Board. Reserve Component (RC) soldiers must possess a complete copy of their DA Form 3349 to be enrolled. Soldiers with a permanent profile will be allowed to attend professional development courses and train within the limits of their profile provided they can otherwise meet all course prerequisites and graduation requirements. The NCOA commandant may dismiss a soldier from a course or refuse to

enroll a soldier in NCOES whenever they determine that due to a soldier's permanent or temporary profile restrictions, the soldier would not be able to complete 100 percent of the course requirements to Army/course minimum standards. (For example, APFT, FTX, lanes training exercise (LTX), wear load bearing equipment, perform evaluated performance tasks, etc.)

e. An APFT is not required for enrollment or graduation at Phase II ANCOC or BNCOC, or at MOS reclassification courses/training. Soldiers will not be required to take an APFT during these courses. Therefore, no APFT entry is required for DA Form 1059 completion purposes for these Phases/courses.

2-7. Conduct of training. Commandants will ensure training is conducted and evaluated per the principles listed in Field Manual (FM) 25-100 in conjunction with FM 25-101 (Note: both manuals to be revised as new "3" series FM publications). Noncommissioned Officer Academy commandants will use the training schedule format outlined in FM 25-101.

a. Prior to enrollment, students must be fully capable of performing supporting individual tasks and the tasks required in the next lower level course. Commandants may evaluate student capabilities through appropriate testing, and if necessary, provide remedial training, recycle to a later class, or return to unit of assignment those students who do not meet course prerequisites or do not have the required minimum skills. Remedial training will be scheduled when applicable on the training schedule, but will not be conducted during normal POI time.

b. Schools will train tasks only at the skill level prescribed for each course.

c. Student training, SGL, SSGL and instructors.

(1) School staffs, faculties, SSGL, and training departments will supervise and support SGL, instructors, and students, and ensure commitment to training, educating, and developing each student.

(2) Trained, qualified, certified, and experienced SGL, SSGL, and instructors will conduct and supervise student training (SSGLs may be used as SGLs as the NCOA commandant deems necessary to accomplish the training mission or as temporary fill-ins when shortages of by-grade SGLs dictate the need to do so). Small group leader-to-student ratios will be sufficient to ensure student control and supervision and facilitate teaching, coaching, mentoring, and developing individual student leadership skills to the level for which training is provided. (See paragraph 2-13.)

(3) Small group leaders, SSGLs, and instructors will provide students with progressive and sequential training, accurate evaluations, and timely feedback via task performance after action reviews.

(4) When applicable, SGLs, SSGLs, and instructors will use mission orders to convey training objectives. Mission orders will clearly articulate the commander's intent. Small group leaders, SSGLs, and instructors will ensure students use mission orders to demonstrate a thorough understanding of the mission and the commander's intent.

d. Training environments must enhance learning, encourage student initiative, require students to attain and sustain high levels of discipline, have defined, publicized, and enforced standards, and focus on preparing the student to lead soldiers through training, maintenance, deployment, and sustained tactical operations in support of unit missions.

e. When possible, students will be given opportunities to gain experience by leading and/or training soldiers in other courses (for example, conduct marksmanship and physical fitness or CTT training for advanced individual training students).

f. Commandants will use proponent-developed end-of-course (Phase II) CPX, FTX, STX, or LTX, virtual or live, in the field or at a job site, as a culminating event designed to evaluate (Go/No-Go) the soldier's ability to perform the terminal learning objectives of the course to graduate. These events will be at least 72 hours in length, be scenario driven and conducted under CONOPS conditions. Leader development course proponents will publish minimum guidelines and evaluation criteria for exercise execution in the course management plan of each course they develop.

g. Student evaluations. Small group leaders and instructors will—

(1) Determine if the student has demonstrated a sufficient level of competency to pass the course IAW the student evaluation plan as prescribed in TRADOC Reg 350-70.

(2) Conduct developmental counseling to provide students information on their strengths and weaknesses, and courses of action to improve performance.

(3) Consolidate and analyze student performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commandant/Course Management Plan (CMP). Small group leaders, SSGLs, and instructors will provide students documented feedback and will use analysis results to determine ratings for completing DA Form 1059 (Service School Academic Evaluation Report (AER)) and course academic records and reports. Records and reports must adequately support appropriate administrative action for students who fail to meet course requirements.

(4) Complete an AER (DA Form 1059) for all students per AR 623-1. Whenever possible, students should receive a copy of their completed AER at graduation. However, although Army policy allows for completion within 60 days after graduation, at a minimum, students will be provided an opportunity to review their draft AER prior to departure. Written comments in block 16 will be tailored for each individual.

h. Training material. Sufficient quantities of the most current training products will be maintained for each class.

(1) Training support package and examination material.

(2) Lesson reference files and course changes.

(3) All training aids and devices referenced in the current lesson plans.

(4) Student issue materials including advance sheets, supplemental readings, compact discs, student handouts, reference books, practical exercises, and solution sheets.

(5) At least one visitor folder will be available in each classroom. See TRADOC Reg 350-18 for visitor's folder contents.

2-8. Student records.

a. The SGL or instructor will create a file for each student containing—

(1) Leadership position evaluations.

(2) Counseling records.

(3) Copy of DA Form 705 (for PLDC, and ANCOC/BNCOC Phase I only).

(4) Test/exam scores. (*Do not file copies of test/exam answer sheets in student records.*)

(5) DA Form 1059.

(6) Copy of student's course attendance pre-execution checklist

(7) Copy of any waivers soldier needed to attend course, signed by first general officer in his/her chain of command.

(8) Other student performance evaluation records and supporting documentation listed in TRADOC Reg 350-18, paragraph 3-28.

b. Commandants will maintain student academic records per AR 25-400-2 (File Number: 351-1f, leaders course evaluations). As an exception for accreditation standards validation, student academic records will be maintained for a minimum of 12 months after course graduation date/phase completion date at the school code location.

c. Test control officers will separately retain test answer sheets and associated student papers until course completion, at which time they will be destroyed. Test answer

sheets of non-graduates and early releases will be retained/secured separately from the graduate student attendance records files for 24 months before destruction.

2-9. Academic test and retest. Criterion-referenced tests, tailored to measure performance abilities, will be used to measure student proficiency per TRADOC Reg 350-70. IAW TRADOC memorandum, ATTG-CD, 6 Oct 01, subject: Student Academic Measurement/Testing PolicyGuidance course proponents will establish the minimum standard (academic score percentage), for written and performance tests, used to determine successful completion of a block of instruction and/or a course. Course proponents must spell out these standards in a written evaluation plan to be issued to each student upon enrollment. Proponents must also include these standards in course management plans and implementing instructions, if course is taught at more than one training location/site. Commandants must test, retest, pass, fail, dismiss, and honor students IAW the policy and procedures in this regulation and the student evaluation plan.

a. After remedial training, commandants may retest one time those students who fail to achieve established minimum written or performance standards on an objective.

b. Retest scores will be annotated in student course records along with counseling and remediation documentation. However, students who require and pass a retest will receive the minimum passing score for that event and will automatically be removed from class honors consideration (except in the case of IMI self-paced instruction). Commandants will dismiss soldiers from the course who fail to meet minimum passing standards or academic score on any performance or written retest.

c. Certain exceptional circumstances may arise during training that might require a second retest (such as the sudden illness or emergency removal of the student during the retest administration, or during the NCOES student's appeal process a disinterested sergeant major determines that another retest is warranted). Based upon a determination and documentation by the commandant that these exceptional circumstances exist, the student is deemed to not have completed the retest and will be retested again. This option must be listed within the student evaluation plan for a course.

d. Commandants will dismiss students from the course who fail to meet performance standards for a graduation requirement, and/or require extraordinary assistance to remain in the course.

e. School commanders and commandants will follow the dismissal and student appeal procedures found in ARs 135-175, 350-1, and 600-8-24.

f. Every effort will be taken to insure that course testing instrument integrity/security is maintained. As a minimum, schools will maintain test materials in a secure location that is inaccessible to students with test instruments and answer keys kept in separate vault/file containers. Test material security procedures will be included in each

school's/NCOA's testing standing operating procedures and other applicable test control publications. Each school's/NCOA's appointed test control officer will maintain records of test instrument destruction.

2-10. Student recognition. See AR 350-1.

2-11. Student dismissal. See ARs 135-175, 350-1, and 600-8-24.

2-12. Student recycle. Academic recycles. After coordination with and approval of the appropriate personnel command and/or individual's unit, commandants may recycle a student once (reenroll a student in a class or phase that follows the class they are in). Coordination for recycling RC students will be through the local RC liaison office. However, academic recycles will be limited to only extraordinary circumstances, that is, a student who (through illness, injury, emergency leave, or other unavoidable circumstances) misses a significant portion (beyond the scope of after-hours make up or remedial training/testing) of evaluated training required for graduation. Commandants must test, retest, pass, fail, dismiss, and honor students IAW the policy and procedures in this regulation and the student evaluation plan.

2-13. Small group instruction. Small group instruction shifts the teaching methodology from "what to think" to "how to think" and places learning responsibility on the student through group participation and assignments as discussion leaders. As an exception, students will not be used as discussion leaders in PLDC.

a. Small group instruction will be used in CGSOC, CCC, WOSSC, WOSC, WOAC, CSMC, SMC, FSC, BSNCOC, ANCOC, BNCOC, and PLDC.

b. As exceptions, use of SGI—

(1) Is not authorized in OBC.

(2) Will be a commandant's choice in OCS, WOBC, WOCS and ROTC. If so, commandants will accomplish with existing resources.

c. An SGL-to-student ratio of 1:12-16 is required in SGI, with the exception of PLDC, which will be 1:6-8. An exception may occur during MOS technical phase(s) when TRADOC Manpower Activity validates a larger or smaller group size because of equipment or facilities restrictions. However, a class will not be conducted above or below these ratios without prior approval of the commandant/CG or his designated representative in the rank of colonel or higher. As an exception, the Commandant, USASMA is approval authority for NCOES common core Phase I regardless if it is taught separately or congruently with MOS technical phase(s).

d. School commandants will man their NCOAs with qualified SSGLs at a minimum ratio of 1:8 (one SSGL to every eight SGL assigned or attached). Exception to this rule is PLDC, where the SSGL-to-SGL ratio at these course-training locations will be

maintained at a ratio of 1:4 (one SSGL for every four SGLs). For NCOES PLDC, BNCOC and/or ANCOC, SSGLs must have had previous field unit platoon sergeant or equivalent level assignment experience to be assigned as a SSGL. ANCOC and/or BNCOC SGLs (as applicable) will be a graduate of both Phase I and Phase II before performing duties as a SGL. Likewise, all SMC/CSMC SSGLs and SGLs must have completed at least one field unit assignment as a sergeant major/Command Sergeant Major (CSM) to be assigned to instructional positions or assume SSGL or SGL duties required for the conduct of these courses.

2-14. Small group leader, senior small group leader and instructor standards. The success of institutional training depends on having experienced SGLs, SSGLs and instructors who are leadership mentors, role models, and teachers. Small group leaders, SSGLs and instructors conduct leadership assessments, counseling, and assist students to identify strengths, weaknesses, and actions to improve performance. They are responsible for student physical conditioning, control, discipline, and administrative requirements; training specified common core tasks in all courses; and training and reinforcing specified branch tasks in branch courses. Minimum SGL, SSGL and instructor training and qualification standards are contained in TRADOC Reg 350-70. Additionally—

a. Commandants or designated representatives—

(1) Will ensure soldiers selected to be SGLs meet the grade, MOS and skill level/assignment experience criteria and physical fitness capabilities of the course they will be assigned to conduct/mentor. SGLs must be of like-MOS (except for PLDC and BNCOC or ANCOC Common Core) and be a graduate of the courses they teach, except as described in paragraph 2-14a(3) below.

(2) For pilot/newly fielded courses, will ensure SGL and instructors complete a train-the-trainer course to meet qualification criteria outlined in the CMP and receive constructive credit as outlined in AR 350-1.

(3) For low-density MOS BNCOC and ANCOC, or when soldier attends the Phase I TASS Common Core at an approved location other than his/her MOS proponent school, commandants may substitute other like-level career progression SGLs in a different MOS when qualified SGLs are not available in the correct MOS. Substitute SGLs must satisfy CMP qualification requirements.

(4) Will provide SGLs, SSGLs and instructors a quarterly written evaluation (except for part-time NCOAs where infrequent class scheduling may only allow evaluations opportunities semi-annually). These evaluations are useful in incentive and recognition programs, as well as for TRADOC-wide competition.

(5) Will maintain file per AR 25-400-2 (File Number: 351b, Instructor information) containing following information—

(a) Documentation of qualification credentials. (Document showing Instructor Training Course and SGI course graduate, meets height/weight standards, and passed last APFT.)

(b) Updated copy of DA Form 2-1 (Personnel Qualification Record, Part II/Enlisted Record Brief) or DA Form 4037 (Officer Record Brief), as appropriate.

(c) Copy of current DA Form 705.

(d) Copy of all written quarterly evaluations for the past 12 months.

Note: See web site www.rmd.belvoir.army.mil/markstit.htm for MARKS file supporting information.

b. Small group leaders, SSGLs and instructors will meet specific grade standards. However, during times when a school is short the required number of by-grade SGLs for a course, commandants may use SGLs who are one grade higher than specified. Soldiers not meeting the minimum skill level/grade standards, or more than one grade higher, will not assume SGL, SSGL or instructor duties without prior written approval of the course proponent commandant/CG or their designated representative in the rank of colonel or higher. The following specific course SGL/instructor criteria apply:

(1) Command and General Staff Officer Course—lieutenant colonel or senior major that is CGSOC, or equivalent, graduate.

(2) Captains Career Course—

(a) Branch-specific phase—major or senior captain.

(b) Staff process training phase—lieutenant colonel.

(3) Officer Basic Course (instructor)—captain (command experience preferred).

(4) Warrant Officer Senior Staff Course—Chief Warrant Officer, CW5.

(5) Warrant Officer Staff Course—Chief Warrant Officer, CW4.

(6) Warrant Officer Advanced Course—Chief Warrant Officer, CW3.

(7) Warrant Officer Basic Course—Chief Warrant Officer, CW2.

(8) Warrant Officer Candidate School—Chief Warrant Officer, CW2.

(9) Sergeants Major Course—sergeant major* with prior assignment experience as a sergeant major.

(10) First Sergeant Course—master sergeant with prior first sergeant/detachment sergeant experience.

(11) Battle Staff Noncommissioned Officer Course—master sergeant* with prior unit battle staff assignment experience.

(12) Advanced Noncommissioned Officer Course—sergeant first class* with prior assignment experience in a Skill Level 4 duty position.

(13) Basic Noncommissioned Officer Course—staff sergeant* with prior assignment experience in a Skill Level 3 duty position.

(14) Primary Leadership Development Course—staff sergeant* with prior assignment experience in a Skill Level 3 duty position.

(15) Senior SGL for PLDC, BNCOC, ANCOC–sergeant first class*.

*See DA Pam 611-21, table 11-1. As an exception, a certified PLDC or BNCOC SGL may continue instructor duties for up to 2 years after promotion to sergeant first class (SFC).

c. Noncommissioned Officer Academy commandants who lack sufficient numbers of the minimum grades required are authorized to utilize NCOs no more than one grade higher than specified to conduct the training. Soldiers not meeting the minimum grade and/or more than one grade higher than required will not assume or be assigned NCOES SGL or instructor duties. This accommodation does not change the grade tables in DA Pam 611-21.

2-15. Accreditation. TRADOC Regs 350-18 and 350-70 govern accreditation. TRADOC accreditation evaluation reports, report of corrective actions, and proponent evaluations will be maintained for use during the next accreditation visit.

2-16. Course credit (constructive and equivalent). See AR 350-1.

a. Types of credit.

(1) Constructive credit may be granted in lieu of course attendance based on duty assignment history and past academic experiences. Individual must possess the same skills and qualifications as course graduates.

(2) For OES and WOES, see AR 350-1.

b. Noncommissioned Officer Education System specific course credit.

(1) Soldiers that successfully complete any of the following training may be granted PLDC NCOES course equivalency.

(a) Reserve Component Primary Leadership Course.

(b) Reserve Component Primary Noncommissioned Officer Course.

(c) Reserve Component Primary Leadership Development Course. (Reserve Component soldiers may complete RC PLDC in one of two options, either in full annual training (AT)/active duty training (ADT) mode or via the two-phased combination inactive duty training (IDT) and ADT IAW the proponent course management plan and implementation instructions).

(d) Reserve Component-BNCOC (must have completed Phase I and II) or RC-ANCOC (Phase I).

(e) United States Marine Corps (USMC) NCO Course.

(f) United States Marine Corps Leadership Course or USMC NCO Leadership.

(g) United States Marine Corps NCO Basic Course.

(h) United States Marine Corps Staff NCO Advance Course (taught at Quantico, VA only).

(i) United States Marine Corps Resident Staff NCO Career Course (taught at Quantico, VA only).

(j) The Sergeant Course and Infantry Squad Leader Courses (taught at Camp Pendleton only). NOTE: The Squad Leader Courses taught at Marine Corp Divisions do not meet PLDC POI equivalency requirements.

(k) Officer Candidate School (AC/RC OCS from any service).

(l) Officer Basic Course (OBC from any service).

(m) Officer Advanced Course (from any service).

(n) CAS3 (or equivalent course from any service).

(o) Command and General Staff Officer’s Course (CGSOC or equivalent course from any service).

(p) Reserve Officers Training Corps Advanced Camp (ROTC from any service).

(q) Warrant Officer Candidate School (AC/RC U.S. Army or USMC WOCS).

(2) Currently, no U.S. Air Force, Navy or Marine Corps courses will be recognized for ANCOC or BNCOC Phase I SACC credit.

c. Noncommissioned Officer Education System equivalency documentation.

(1) Soldiers must provide DA Form 1059 (student academic report) or service equivalent documentation to gain equivalency credit.

(2) For equivalency purposes under option two, DA Form 1059 must be provided for both Phase I and Phase II.

(3) The policy outlined above (per TRADOC Message 050523Z May 93) represents the authority for Personnel Service Centers to grant AC-PLDC and other course equivalency for attendance at recognized DA and TRADOC-approved TASS course POIs.

(4) In all cases, an outline of the individual's prior leadership and technical training and experiences, along with supporting documentation, (to include a ATRRS printout on the soldier) will be attached to DA Form 4187 (Personnel Action). Submit this information through command channels and the course proponent for consideration by the appropriate personnel command, as follows:

(a) Active Component. Commander, PERSCOM, ATTN: TAPC-EPT-FN.

(b) United States Army Reserve. Commander, AR-PERCEN, ATTN: ARPC-EP.

(c) Army National Guard of the United States. Chief, National Guard Bureau, ATTN: NGB-ARP-E.

(5) Active and RC soldiers promoted to their current rank prior to 1 October 1992 are considered as NCOES-qualified commensurate with their current rank.

(6) Individuals will be granted equal credit for successfully completing institutional training conducted either at a TASS school battalion or at a proponent resident school when the conditions below are met. Course completion documentation in the individual's records will not differentiate between modes of instruction.

(7) Training is conducted in the schoolhouse, proponent-accredited TASS school battalions, or their functionally aligned teaching sites.

(8) Instructors are proponent-certified.

(9) Proponent developed, certified, and approved TASS courseware is utilized. (Reserve Component soldiers will be credited for successfully completing proponent developed, certified, and approved Reserve Component Configured Courseware course until new TASS courseware is fielded.)

(10) Request for equivalency credit for Phase I ANCOC or BNCOC must be routed to Commandant USASMA, 11291 SGT E Churchill St, Fort Bliss, TX 79918-8002, with

copy furnished Commander TRADOC, 5 Fenwick Road, ATTN: ATTG-ILN, Fort Monroe, VA 23651-1049, for approval.

(11) The proponent MOS school (not HQ TRADOC) must approve request for equivalency credit for ANCOC or BNCOC MOS Phase II

2-17. Risk management (RM).

a. In accordance with FM 100-14, RM is a five-step process integrated into training decisionmaking to identify and eliminate unnecessary risk by—

(1) Identifying potential hazards that may be encountered during mission or task performance.

(2) Assessing hazards.

(3) Making decisions and developing controls.

(4) Implementing appropriate controls to reduce or eliminate hazards.

(5) Supervising mission/task performance to include evaluating performance to adjust as needed and incorporating lessons learned into future actions.

b. Commandants will—

(1) Adhere to TRADOC risk assessment decision authority levels in all training operations, per TRADOC 385-2, paragraph 4-4.

(2) Establish course safety standards and integrate safety/caution statements, RM decisions, and fratricide prevention actions into appropriate training documents.

(3) Ensure leader course graduates possess the skills and knowledge to conduct high-risk training and operations safely and successfully. Risk management must be integrated throughout all training in such a way as to provide realistic, mission-oriented applications. To achieve the desired endstate, RM must be reinforced, practiced, and individual students evaluated. This will occur through practical hands-on application during the training of common core and branch tasks taught under operational conditions.

(4) Include RM and fratricide prevention in course tests.

c. Safety standards. Leader safety training will include progressive and sequential RM and fratricide prevention training.

2-18. Safety and force protection.

a. Force protection must be an integral part of mission planning by including RM in the decisionmaking process. Risk management eliminates unnecessary risk to the force and the mission, minimizes fratricide, and avoids accidental injury to soldiers and damage to equipment. Force protection responsibilities continue around the clock, both on and off duty.

b. Safety in training and training safely are not synonymous. Safe training is achieved by integrating safety in the planning, development, and conduct of training per FMs 25-100 and 25-101. Leaders must commit to accomplishing missions without unnecessarily jeopardizing lives and equipment. They must recognize unsafe behavior while making prudent risk decisions and developing operational processes to minimize hazards.

c. Training safety consists of three interlocking tiers.

(1) Tier 1: Commander validates soundness of training and evaluates plans for safety and resolving safety issues.

(2) Tier 2: First line leader identifies necessary actions by responsible individuals, establishes a system to monitor training safety, and focuses on adherence to standards.

(3) Tier 3: Individual ensures soldiers look after themselves and others and know how to recognize unsafe conditions and acts.

2-19. Environmental protection and stewardship.

a. Leaders are the Army's environmental stewards. They have a professional and personal responsibility to—

(1) Understand and support the environmental program.

(2) Integrate into every mission the Army's vision to be a national leader in environmental and natural resource stewardship for present and future generations.

b. Leaders use the same five-step process defined in paragraph 2-17, above, to identify, eliminate, or reduce environmental risks whenever possible. Detailed procedures are contained in TC 3-34.489, and FM 3-100.4.

2-20. Leadership assessment and development. Schools will use FM 22-100 as a guide to implement a standard leadership assessment process to evaluate student leadership values, attributes, skills and actions (VASA). Information obtained from the process will be the basis for course leadership grades and AER. Minimum program requirements include—

a. Student assessments.

b. Counseling that includes identification of strengths, weaknesses, and developmental needs.

c. Assisting students in identifying courses of action to improve their performance.

2-21. Common core. The TRADOC-approved common core task lists contain the approved common soldier and leadership tasks selected for training, and common to all leaders for each specified skill level, grade and/or organizational level of assignment, regardless of branch or career management field. The common core task lists will be comprised of all approved critical common military and common leader tasks selected for officer (to include precommission), warrant officer (to include preappointment), and NCO professional development leader education and training courses.

a. For horizontal alignment purposes, tasks included in the common core are the sole source of common leader training requirements and are published under the authority of CG, TRADOC. Common core consolidates all common soldier, common leader, and directed/mandated training into a single task or subject list for each officer (to include precommission), warrant officer (to include preappointment), and noncommissioned officer leader training and education courses. The use of terms other than "common core" to describe training of this nature is not authorized.

b. Common core training products will be applied uniformly in the appropriate courses and trained to standard. Training time for each task may differ or be adjusted by the proponent school commandant according to target audience based on the progressive and sequential course designs. The common core task list and TSPs can be found on the Reimer Digital Library for officers and warrant officers, and on the USASMA homepage for NCOES/NCO functional courses. Both sites are linked to the TRADOC homepage.

c. The common core critical task list will be updated/revalidated triennially through Occupational Data, Analysis, Requirements, and Structure soldier job analysis surveys, followed by task selection boards. TRADOC DCSOPS&T will oversee and executive agents will conduct these boards to validate the critical tasks to be trained at each organizational level. Common core executive agents will be represented along with subject matter experts from U.S. Army Forces Command and TRADOC schools. The board will focus on horizontal alignment of tasks to be trained across all three professional development systems (OES, WOES and NCOES). The specific course designers at each executive agent will determine the site, method, and media to be used to deliver the training in order to achieve vertical alignment and sequencing in a progressive and sequential manner per TRADOC Reg 350-70.

d. Recommended changes to the TRADOC approved common core task list will be considered, in coordination with the executive agents, at any time. Recommendations with justification will be forwarded on DA Form 2028, through the chain of command, to Commander, TRADOC, ATTN: ATTG-IL.

2-22. Common Task Test for NCO leaders. Common task test evaluates leader proficiency in the performance of selected common tasks at specific skill levels. The source of CTT tasks for leaders is the TRADOC-approved enlisted common soldier task list, as follows:

a. Primary Leadership Development Course common core tasks for Skill Level 2.

b. Basic Noncommissioned Officer Course common core tasks for Skill Level 3.

c. Advanced Noncommissioned Officer Course common core tasks for Skill Level 4.

2-23. Mobilization training strategy. Mobilization training strategy is contained in TRADOC Mobilization Operations, Planning and Execution System (TMOPES), AR 690-11, and DA Pam 690-47.

TR 350-10, Ch 5.

Chapter 5
The Noncommissioned Officer Education System (NCOES)

Section I
General

5-1. Background.

a. The goal of NCOES and NCO training is to prepare NCOs to lead and train soldiers who work and fight under their supervision and assist their assigned leaders to execute unit missions.

b. The NCOES consists of PLDC, BNCOC, ANCOC, and SMC. Both PLDC and SMC are branch-immaterial courses, while BNCOC and ANCOC include branch-immaterial common core and branch-specific training. Branch immaterial functional courses are BSNCOC, FSC, and CSMC. Common core will be fully incorporated into NCO training IAW the appropriate CMP. Exception to this is the Stand-Alone TASS Phase I USASMA ANCOC and BNCOC Common Cores that are listed in ATRRS separately. Noncommissioned Officer Education System ANCOC/BNCOC technical phase MOS proponents will only list and include Phase I as part of their MOS course administrative data for instructor contact hours purposes as "developed by other – USASMA Common Core." Successful completion of Phase I is a prerequisite for attendance at ANCOC or BNCOC phase II MOS-specific training courses. Exception to this policy is when the Phase II is conducted at Interservice Training Review Organization, Department of Defense (DOD) or a joint service school where scheduling of quotas is not controlled by U.S. Total Army Personnel Command (PERSCOM) or other Army element.

c. The NCOES courses provide NCOs with progressive and sequential leader, technical, and tactical training that is relevant to duties, responsibilities, behaviors and missions they will be required to perform in operational units after graduation. Training builds on existing VASA and experience.

5-2. Selection, administration, and assignments for NCOES. See AR 614-200, NGR 600-200 and AR 350-1.

5-3. Primary Leadership Development Course (PLDC). The PLDC is a branch-immaterial course conducted at NCOA worldwide and TASS school battalions, which provides basic leadership training for soldiers selected for promotion to sergeant. Primary Leadership Development Course provides an opportunity to acquire the leader VASA and knowledge needed to lead a team-size unit, and serves as the foundation for further training and development. Graduates of PLDC are recognized by MEL code X IAW Enlisted Distribution and Assignment System (EDAS) input into Standard Installation Division Personnel System (SIDPERS). Training focuses on—

a. Self-discipline.

b. Demonstrating professional ethics and values.

c. Leading, disciplining, and developing soldiers.

d. Soldier performance-oriented counseling.

e. Planning, conducting and evaluating individual and team-level performance-oriented training.

f. Caring for soldiers and their families.

g. Establishing the foundation for further training and leader development.

5-4. Basic Noncommissioned Officer Course (BNCOC). The BNCOC provides soldiers selected for promotion to staff sergeant an opportunity to acquire the leader, technical, tactical, VASA and knowledge needed to lead squad-size units. Training builds on experience gained in previous training and operational assignments. Branch schools and selected TASS school battalions conduct this course. Graduates of BNCOC are recognized by MEL code V. Training focuses on—

a. Preparing unit and subordinate elements for peace and wartime missions and contingencies.

b. Planning, supervising, and executing tasks and missions assigned to squad-size units.

c. Leading, supervising, disciplining, training, and developing subordinates.

d. Planning, scheduling, supervising, executing, and assessing the unit's mission-essential training.

e. Planning, initiating, and supervising personnel, administration, and supply actions.

f. Planning, supervising, and assessing the safe use, maintenance, security, storage, and accountability of personal and organizational equipment and material.

g. Caring for subordinates and their families.

h. Active Component soldiers will be scheduled in ATRRS to attend BNCOC Phase I common core and MOS technical training sequentially within the same fiscal year. Active Component soldiers may attend Phase I common core at full resident NCOAs, via video teletraining (VTT), or at the nearest TASS training site.

i. The first general officer in the AC soldier’s chain of command may grant a waiver extension of up to 6 months or until the next Phase II technical MOS course start date, whichever occurs first.

j. Reserve Component BNCOC common core training requires formal school attendance one weekend per month for 6 consecutive months or 2 weeks AT/ADT. Soldiers must begin branch-technical training within 24 months of completing common core training. Request for waiver to the 24-month requirement will be forwarded through command channels for approval by the first general officer in the soldier's chain of command as follows:

(1) An additional 12 months may be granted for cogent reasons by the first general officer in the soldier’s chain of command. However, soldiers must begin BNCOC branch-technical training within 36 months of completing common core Phase I training. Soldiers will report to school with a copy of the approved waiver and the DA Form 1059 indicating successful completion of Phase I.

(2) An additional 12 months (added to the 36 months) may also be granted by the first general officer in the chain of command for a reclassification training requirement incurred following completion of common core training (soldier must start branch-technical training within 48 months of completing common core training). Soldiers will report to school with a copy of the approved waiver and both common core and MOS reclassification training DA Forms 1059.

(3) Any AC/RC soldier that exceeds their maximum waiverable NCOES time line attendance windows, as applicable in paragraphs 5-4 or 5-5, must submit an exception to policy through the first general officer in the soldier’s chain of command, to Commander, TRADOC, ATTN: ATTG-I. This request packet must include the following:

(a) Memorandum requesting exception to policy.

(b) Army Training Requirements and Resource System printout showing soldier's course attendance record and available course start dates.

(c) Any documentation that supports the soldier's claim for the exception requested.

(d) DA Form 1059 for completion of Phase I training.

(e) Name, e-mail address, phone and FAX numbers of soldier's unit POC.

5-5. Advanced Noncommissioned Officer Course (ANCOC). The ANCOC provides soldiers selected for promotion to sergeant first class an opportunity to acquire the leader, technical, tactical VASA and knowledge needed to lead platoon-size units. Training builds on experience gained in previous operational assignments and training. Branch schools and selected TASS school battalions conduct this course in a live-in learning environment. Graduates of ANCOC are recognized by MEL code T. Training focuses on:

a. Preparing unit and subordinate elements for peace and wartime missions and contingencies.

b. Planning, supervising, and executing tasks and missions assigned to platoon-size units.

c. Leading, supervising, disciplining, training, and developing subordinates.

d. Planning, scheduling, supervising, executing, and assessing the unit's mission essential training.

e. Planning, initiating, and supervising personnel, administration, and supply actions.

f. Planning, supervising, and assessing the safe use, maintenance, storage, security, and accountability of personal and organizational equipment and material.

g. Caring for subordinates and their families.

h. Active Component soldiers will be scheduled in ATRRS to attend ANCOC phase I common core and MOS branch technical training sequentially within the same fiscal year. Active Component soldiers may attend Phase I common core at resident, via VTT, or at the nearest TASS training site.

i. Active Component commanders will send ANCOC/SFC promotion selectees to Phase I and II when scheduled by PERSCOM. Commanders must notify PERSCOM NLT 45 days from the scheduled course date if this soldier is physically unable to attend on the date scheduled. In all cases, PERSCOM will be the final approval granting authority on requests for class deferments.

j. Reserve Component soldier attendance at ANCOC common core training requires formal school attendance one weekend per month for 6 consecutive months or 2 weeks AT/ADT. Soldiers must begin branch-technical training within 24 months of completing common core training. Request for waiver to the 24-month requirement will be forwarded through command channels for approval by the first general officer in the soldier's chain of command as follows:

(1) An additional 12 months may be granted for cogent reasons by the first general officer in the soldier's chain of command. However, soldiers must begin ANCOC branch-technical training within 36 months of completing common core Phase I training). Soldiers will report to school with a copy of the approved waiver and the DA Form 1059 indicating successful completion of Phase I (third year).

(2) An additional 12 months (added to the 36 months) may also be granted by the first general officer in the chain of command for a reclassification training requirement incurred following completion of common core training (soldier must start branch-technical training within 48 months of completing common core training). Soldiers will report to school with a copy of the approved waiver and both common core and MOS reclassification training DA Forms 1059.

(3) Any AC/RC soldier that exceeds their maximum waiverable NCOES time line attendance windows, as applicable in paragraphs 5-4 or 5-5, must submit an exception to policy through the first general officer in the soldier's chain of command, to Commander, TRADOC, ATTN: ATTG-I. This request packet must include the following:

(a) Memorandum requesting exception to policy.

(b) Army Training Requirements and Resource System printout showing soldier's course attendance record and available course start dates.

(c) Any documentation that supports the soldier's claim for the exception requested.

(d) DA Form 1059 for completion of Phase I training.

(e) Name, e-mail address, phone and FAX numbers of soldier's unit POC.

5-6. Sergeants Major Course (SMC). The SMC is a branch-immaterial course for master sergeants and first sergeants selected for promotion to sergeant major, and for recently promoted sergeants major. (The DA board may also select non-promotable master sergeants and/or first sergeants for early attendance.) The Sergeants Major Course is a task-based, performance-oriented, scenario-driven course that includes instruction in leadership, combat operations, and sustainment operations. Specific areas of study include team building, communicative skills, national military strategy, training management, force projection, and professional development electives. The course integrates the learning objectives of the battle staff NCO course, and master fitness

training. A corresponding studies program is also available, which consists of resident and non-resident phases. Graduates of SMC are recognized by MEL code S.

5-7. Battle Staff Noncommissioned Officer Course (BSNCOC). The BSNCOC is a two-phase branch-immaterial functional course for staff sergeants through sergeant major selected for staff assignments. Curriculum phases and attendance criteria are as follows:

a. Phase I is the preresident phase (self-study package) including an exam taken via the Internet. Battle staff designees will have 60 days to complete Phase I before attending the resident phase (Phase II) of the course. Phase II can be completed in one of three methods and course lengths. The soldier may complete Phase II via resident attendance either at USASMA (Fort Bliss, TX), at one of the USASMA delivered VTT training sites, located in both CONUS and OCONUS, or at the NCOA at Fort McCoy, WI.

b. Training focuses on managing day-to-day operations of a battalion level or higher command post.

c. The prerequisites for attending the BSNCOC course are:

(1) Be a staff sergeant through sergeants major.

(2) Assigned to a valid ASI coded 2S position IAW DA Pam 611-21.

(3) Meet the height and weight guidelines IAW AR 600-9.

(4) Pass an APFT during Phase II as a graduation requirement.

d. Active Component requests for training should be forwarded through local approval authority (for example, G3, Director of Plans, Training, Mobilization, and Security (DPTMS)) who submits an A1 application to PERSCOM requesting a school seat in ATRRS. Reserve Component requests for training are submitted as follows: Troop Program Units forward requests for training through their MACOM for approval. Active Guard Reserve forwards requests through the Full Time Support Management Division for approval. National Guard Units requests for training should be forwarded through their major subordinate command who submits requests to the state Plans Operations and Training Officer for approval.

e. Graduates of BSNCOC are awarded the ASI 2S.

5-8. First Sergeants Course (FSC). The FSC is a two-phased branch-immaterial functional course for first-time first sergeant designees. Curriculum phases and attendance criteria are as follows:

a. Phase I is the preresident phase (self-study package) including an exam taken via the Internet. First sergeant designees will have 60 days to complete Phase I before attending Phase II. Phase II consists of 15 training days (resident or VTT). All Active Army sites conduct Phase II over a 3-week training period. The Reserve Component Training Institutions will conduct Phase II in 15 consecutive training days.

b. Training focuses on leader, technical, and tactical tasks relevant to missions, duties, and responsibilities assigned to leaders of company-size units. Training expands previously acquired skills, knowledge, and experience by adding company-level functional areas such as personnel, administration, maintenance, training, supply, security, UCMJ, etc.

c. In accordance with AR 614-200, paragraph 8-21, all Active Army first-time first sergeants will attend the FSC prior to assumption of duties.

d. The prerequisites for attending the FSC are:

(1) Be a SFC, SFC(P), or master sergeant.

(2) Be an ANCOC graduate. First sergeant designees in rank of SFC must complete one year of service after graduation from ANCOC prior to attending FSC.

(3) Be a selectee for, or filling a valid first sergeant or detachment sergeant position.

(4) Meet the height and weight guidelines IAW AR 600-9 for Phase II enrollment.

(5) Pass an APFT during Phase II as a graduation requirement.

e. Active Component requests for training should be forwarded through local approval authority (for example, G3, DPTMS) who submits an A1 application to PERSCOM requesting a school seat in ATRRS. Reserve Component requests for training are submitted as follows: Troop Program Units forward requests for training through their major subordinate command for approval. Active Guard Reserve forward requests through the Full Time Support Management Division for approval. National Guard Units requests for training should be forwarded through their major subordinate command who submits requests to the state Plans Operations and Training Officer for approval. Graduates of FSC are recognized by MEL code R.

f. FSC graduates are recognized by SQI "M".

5-9. Command Sergeants Major Course (CSMC). The CSMC is a branch-immaterial course conducted at USASMA for newly appointed CSM. The CSMC prepares individuals for battalion-level CSM assignment and includes a program for spouses.

Section II
Noncommissioned Officer Academies (NCOA)

5-10. Overview.

a. Noncommissioned Officer Academies conduct training in a challenging leadership-intensive environment designed to reinforce leadership and professional skills as part of student academic training and embedded in the daily routine.

b. Branch proponents and selected MACOM and installations establish NCOA per AR 350-1 and this regulation.

5-11. NCOA staffing and organization.

a. The NCOA commandant is a CSM who works under the supervision of a MACOM, installation, or division commander and that commander's CSM.

b. Staffing of NCOA is governed by the Manpower Staffing Standards System (MS3). Noncommissioned Officer Academy manpower is identified by management decision package "TSGT."

c. Commandants will attach and/or assign to the NCOA sufficient numbers of full-time SGLs, by MOS mix, and SSGLs, by CMF mix, required to train their programmed NCOES annual, by course, student loads.

(1) The SGL assigned to conduct each course/class will mentor and evaluate their students from day one through course graduation and complete separate DA Form 1059s on each student enrolled at the end of both common core and MOS technical training. It is the TRADOC Commander's intent that except where prohibited due to safety concerns/constraints, the assigned or attached SGL should teach, coach, mentor, counsel and evaluate their students to the maximum extent possible during the conduct of all NCOES courses.

(2) The SGL MOS will be immaterial for the conduct of Phase I stand-alone ANCOC/BNCOC Common Core. However, for quality mentoring purposes, it is desired that a like CMF/MOS SGL be used to train soldiers who receive Phase I and II of their ANCOC or BNCOC congruently at their MOS proponent NCOA/school.

(3) Proponent NCOES students will not be administratively handed off, released, or turned over to the school's technical training departments at the end of Phase I ANCOC or BNCOC. While the proponent school's technical training departments may be responsible for delivering the MOS-specific curriculum, the NCOA commandant will remain responsible for each student's status. An assigned or attached academy SGL will remain in control of all NCOES attendees until they graduate or are otherwise disenrolled.

(4) Soldiers arriving at proponent schools for Phase II only (having already completed Phase I at another location), will be assigned to an academy like MOS SGL and join a like-MOS group for completion of their technical training.

(5) At ANCOC/BNCOC, no honors certificates or diplomas (other than the DA Form 1059) will be issued until the entire level of training or course (Phase II technical MOS phase/phases of the course) is completed.

Tab 34

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Standard 34 Reference Excerpts

TR 350-18, paras 3-32c&d. *Notice of academic, denied enrollment or withdrawal. The TASS battalion commander/commandant will provide written notice to the first general officer in the student's chain-of-command, company commander, and to the order issuing headquarters, if appropriate, for students who:*

c. Withdraw from the course for any reason.

d. Fail to meet course standards, either academically, physically, or through misconduct.

TR 350-18 para 3-33. Student dismissal. Procedures for student dismissal are outlined in AR 351-1 (AR 351-1 will be superseded by AR 350-1) and AR 623-1.

TR 350-18, para3-33, Student dismissal. Procedures for student dismissal are outlined in AR 351-1 (AR 351-1 will be superseded by AR 350-1) and AR 623-1.

AR 623-1, para 1-13, Referred reports.

a. The following types of reports will be referred to the student by the reviewing official for acknowledgment and comment.

1. Any report with the following ratings:
   a. A "NO" response.
   b. An "UNSAT" rating.
   c. A "marginally achieved course standards" response.
   d. A "Failed to achieve course standards" response. If this block in item 13 is checked, the preparing official should address in item 16, Comments, whether the deficiency reflects on the character/behavior of the student or lack of aptitude in certain areas.

2. Any report with comments that in the opinion of the reviewing official are so derogatory that the report may have an adverse impact on the student's career.

3. Any report with an entry of "FAIL" for the Army Physical Fitness Test (APFT) or "NO" for height and weight indicating noncompliance with AR 600-9.

b. Item 13 will be left blank on AERs for students released from a course of instruction or degree program through no fault of their own (e.g., medical, compassionate reasons), approved retirement, or resignation from the service and the report need not be referred; however, the circumstances must be fully explained in item 16, Comments (DA Form 1059), or item 14 (DA Form 1059-1).

c. *After signing a referred report, the reviewing official will forward the report to the student, via a memorandum, f or acknowledgment and comment.* The reviewer will ensure that the provisions of this regulation have been followed. The student will acknowledge receipt of the referred report and may enclose a comment or statement if

he or she feels that the rating or remarks are incorrect. The student's statement must be factual. The referral memorandum and acknowledgment are forwarded with the report.

1. Comments or statements by the student do not constitute an appeal. Appeals are filed and processed separately as outlined in AR 623-105 for officers, and AR 623-205 for enlisted personnel.

2. If the student has departed the school under circumstances that preclude immediate referral of a report to him or her, forward a copy by certified return mail directly to the student marked "Personal in Nature," or send a copy to the student's commander for acknowledgment and comment. If the enlisted student fails to acknowledge receipt of the report in the time period specified (a reasonable suspense period), the certified mail number will constitute acknowledgment.

AR 351-1, para 1-10, Student dismissal.

On occasion, certain students must be dismissed from courses for other than academic reasons in order that Army training institutions can conduct efficient training.

a. To protect students form unfair or illegal practices, commanders of Army training institutions will establish precise procedures to determine whether students in the following categories should be dismissed from training:

1. Students whose personal conduct is such that their continuation in the course is not appropriate. No formal adjudication of guilt by a military or civilian court or by a commander under Article 15 of the Uniform Code of Military justice (UCMj) is necessary to support dismissal under this paragraph.

2. Students whose academic progress, demonstrated motivation, attitude, or conduct, although not cause for formal disciplinary action, come under one of the following categories:

a. Prejudicial to the interests of other students in the class.

b. Make it extremely unlikely that the student can successfully meet the standards established for graduation.

c. In establishing student dismissal procedures, the following considerations will be addressed:

1. The right of the individual to due process, sufficient to protect his or her interests, recognizing that a board hearing is not necessary in every case.

2. The need of the institution to dismiss students who require so much faculty attention to succeed that other students suffer unreasonably as a result.

3. The needs of the Army to-

a. Safeguard adherence to basic Army policy and standards.

b. Maintain adequate audit trails of important personnel actions.

4. Dismissal of ARNG personnel on full-time training duty (FTTD) and USAR personnel on initial duty for training (IADT), active duty for training (ADT), and Active

Guard/Reserve (AGR) tours to be coordinated with the chief, National Guard Bureau (CNGB) or the Chief, Army Reserve (CAR), as appropriate.

5. The provisions of this regulation apply as well to foreign military students. However, complete written reports will be submitted to HQ, U.S. Army Training and Doctrine Command (TRADOC), Security Assistance Training Field Activity (SATFA), Fort Monroe, VA 23651-5000 when dismissal of a foreign military student is contemplated. Final authority for dismissal of a foreign military student rests with the Commander, TRADOC in accord with AR 12-15.

AR 351-1, para 5-30, Student elimination from NCOES courses.
a. Students may be removed from NCOES courses by the service school or NCOA commandant before course completion for the following:

1. Disciplinary reasons.
2. Lack of motivation.
3. Other valid reasons, such as illness or injury.
4. Academic deficiencies.

b. Commanders and supervisors will initiate stringent enforcement procedures to ensure that all soldiers meet body fat standards before departing for professional military or civilian schooling. Personnel responsible for issuing TDY or PCS orders will include information in the orders that soldiers are responsible for reporting to their next duty station or school in a satisfactory physical condition, able to pass the APFT and meet weight/body &t standards. *Those arriving at schools in an overweight condition will be denied enrollment except for soldiers TDY and return, or TDY en route to a PCS who, in the opinion of the school/commandant, can meet their body fat standard by the end of the course or within 30 days, whichever comes first. Overweight soldiers who do not meet their body fat standard within the probationary period will be disenrolled and will not graduate.* An academic efficiency report (when required) will be annotated to indicate failure to meet body fat standards, and the appropriate career division will be notified for soldiers in a TDY en route to PCS status.

c. Failure of a student to maintain standards during the course may constitute an infraction of the UCMJ or may simply indicate a lack of motivation or aptitude.

1. Students whose actions during the training constitute a violation of the UCMJ may be—

a. Suspended or dismissed from the course.
b. Reported to the commander exercising court-martial authority.

2. Students whose actions demonstrate a probable lack of motivation will be counseled by the following:

a. Training supervisor.
b. Senior NCO (CSM or 1SG) of their parent unit, where possible.

3. If the student is considered for disenrollment for motivational, disciplinary, or academic reasons, and the reasons are adequately documented to sustain elimination action, the following procedures apply.

a. Notify the student in writing of the proposed action, basis for the action, consequences of disenrollment, and right to appeal. (Appeal must be submitted within 2 days after receipt of the written notification.)

b. Obtain from the student an endorsement acknowledging that a counseling session was held and that an elimination notice was received. The endorsement also must indicate the student's intent with regard to appeal.

c. Appeals by PLDC, BNCOC, or ANCOC students will be forwarded to the commandant of the NCOA. The NCOA commandant will refer the appeal for final action to a disinterested sergeant major (E9), appointed by the General Court Martial convening authority, who is not assigned to the NCOA involved. The appeal will be reviewed by a judge advocate prior to final action by the sergeant major. All appellate actions will become part of the student's case file.

d. Appeals for USASMC students (resident and nonresident courses) will be forwarded through the Commandant USASMA to the General Court Martial convening authority for final action.

e. Soldiers who have elected to appeal will remain actively enrolled in the course pending disposition of the appeal. However, as an exception to this policy, soldiers who are disrupting the normal day-to-day operation of the course will be released immediately.

4. Individuals eliminated for disciplinary reasons, lack of motivation, or failure to master tasks at sufficient speed to meet course training objectives will have the matter recorded on their DA Form 1059 under AR 623-1.

a. Soldiers eliminated for cause may, by appropriate authority, be removed from the Army standing promotion list, barred from reenlistment, receive nonjudicial punishment, or be reclassified.

b. Soldiers eliminated from USASMC for other cogent reasons will not be eligible for reentry into the course.

c. Soldiers eliminated from ANCOC for other than academic reasons may request reenrollment after a period of 1 year. Requests will be routed through command channels to Commander, MILPERCEN (DAPC-EPT-FN) 2461 Eisenhower Ave, ALEX VA 22331-0400. The immediate commanders must specifically recommend approval or disapproval and indicate reasons for their recommendation. Commanders in the grade of LTC or above may disapprove requests without forwarding the case to a higher level of command.

d. Soldiers eliminated from PLDC and BNCOC for other than academic reasons will not be eligible for further NCOES training for a period of 6 months.

e. A student eliminated for academic deficiency from NCOES courses (other than the USASMC), may re-enter the course when both the unit commander and the school commandant determine that the student is prepared to successfully complete the course. For those courses where scheduling is accomplished by MILPERCEN, the school commandant will notify the appropriate career management branch of the recommendation that the soldier be rescheduled for training.

f. Personnel eliminated from NCOES course (PLDC/*BNCOC)* who are allowed to attend a second time must start at the beginning of the course upon reenrollment.

g. Students who fail to meet established HQ TRADOC test standards through three separate evaluations (i.e., original test and two retests), each followed by reinforcement training, and reviewed by the NCOA commandant, will be dismissed from training for academic deficiency. These soldiers may be considered by their chain of command for reclassification or retraining in another MOS.

h. Soldiers who pass a retest will be given credit for passing at the minimum HQ TRADOC established passing score regardless of the actual retest grade.

i. Hands-on testing is encouraged and should be used as often as practical. Proponents will determine the best mix hands-on and other type testing.

j. An end-of-course comprehensive test (EOCCT) will be administered in all BNCOCs and ANCOCs. There is no EOCCT in PLDC or the USASMC.

5. Disenrollment for illness, injury, compassionate transfer, or other reasons beyond the control of the individual will be made without prejudice. The NCOA will provide a written statement to the soldier's unit, stating the reason for termination, and the soldier will be eligible for reenrollment as soon as convenient.

6. ARNG soldiers on full-time training duty (title 32, USC) do not fall under the UCMJ. Appropriate disciplinary action should be taken in coordination with the State adjutant general concerned.

d. Individuals may be removed for cause or substandard performance of duty from ANCOC or USASMC selection lists under the following procedures:

1. Removal action may be initiated by any commander in the individual's chain of command.

2. A removal action must contain a statement that the individual has been—

a. Notified in writing of the proposed action.

b. Informed of the consequences of removal.

c. Afforded a reasonable period of time (generally not less than 5 working days) in which to submit matters in rebuttal.

3. A removal action must be approved by an officer exercising general courtmartial authority over the individual.

4. Approved removal actions must be electronically reported to MILPERCEN (DAPC-EPT-FN), 2461 Eisenhower Ave, ALEX VA 22331{)400. The following information will be forwarded:

a. Name.

b. Social security number.

c. Date of removal.

d. Brief synopsis of reasons for removal.

TR 350-6, Ch 3.

Chapter 3
Training Policies, Procedures, and Administration

3-1. Initial Entry Training strategy. Initial Entry Training commanders and commandants will ensure their training programs incorporate the following tenets of TRADOC's IET strategy:

a. The chain-of-command is responsible for training. Commanders must ensure that training meets POI standards and conforms to TRADOC policies on the conduct of training.

b. Drill sergeants will conduct as much of the skill training as possible in BCT and OSUT. When drill sergeants are the primary trainers, the role of the committee group will be to augment cadre instructors, serve as subject matter experts (SME), and advise on the conduct of training.

c. Primarily, SMEs will conduct MOS training; however, to the maximum extent feasible, drill sergeants will be involved in the technical training in AIT. Drill sergeants are the MOS role models. They will assist with MOS skill practice and will, at times, be assigned additional duties as assistant instructors to augment SME instruction. Academic instructors must assist unit cadre in the soldierization effort.

d. Cadre must be proficient in the tasks trained. Initial Entry Training commanders will establish certification programs IAW paragraph 3-6c to ensure that cadre have the competence and skill proficiency to execute and evaluate effective training.

e. Military occupational specialty training must be taught in as realistic an environment as possible. Scenario-driven FTXs are used to achieve this realism. These FTXs should focus on the warfighting application of acquired MOS skills and reinforce basic combat and teamwork skills.

f. Through a system of rigorous evaluations of training and testing, TRADOC, ATC commanders, and school commandants must ensure that training standards are enforced.

3-2. Development of training programs. The proponent school is responsible for POIs. New and revised POIs will be prepared and approved IAW TRADOC Reg 350-70. Commanders will ensure all training periods are initially risk assessed and the risk assessment is updated as factors change.

3-3. Modifications to training programs.
a. The time allotted for subjects in a POI may vary depending on the aptitude and achievement levels of each group of soldiers, the number of soldiers in each cycle or

class, the instructor-to-student ratio, and the availability of facilities. For these reasons, adjustments may be made to the amount of time devoted to a task provided the learning objectives and performance standards are met and the overall course length remains unchanged.

b. Headquarters, TRADOC, ATTN: ATTG-IT, will be informed of temporary changes to IET training programs that do not require a revision to the POI. Information provided will include the purpose and nature of the temporary change or planned pilot, its duration, and the number of students involved. Army training centers will coordinate plans for such pilots with proponent schools. A risk assessment will be conducted in support of temporary changes to identify any new hazards, changes in residual risk, and appropriate hazard controls and/or risk countermeasures necessary to ensure training safety. The supporting safety office will review and validate the risk assessment.

c. Army training center commanders' recommendations are an important part of the continuing POI review and update process. Army training center commanders will submit recommended POI changes to the appropriate schools. The schools will evaluate these recommendations and, if appropriate, revise course materials, individual training plans (ITPs), course administrative data (CADs), and POIs IAW TRADOC Reg 350-70. The proponent school commandants will make the final decision on task selection and training methods.

3-4. Company training starts.
a. Basic Combat Training and OSUT companies must begin the training cycles NLT Friday after the close of the reception week (RW). Advanced Individual Training soldiers must begin training NLT the scheduled start date as established in ATRRS. This is driven by the fact that the U.S. Army Recruiting Command (USAREC) operates on a RW that begins on Tuesday and ends the following Monday. The last soldier to arrive in the RECBN on Monday must be processed and shipped to a training company NLT Friday IAW AR 612-201. The RECBN will complete processing within 4 working days, less weekends and holidays, after the receptee arrives at the TRADOC installation.

b. The standard BCT POI is 9 weeks (54 training days) in duration. BCT companies will graduate after 9 weeks of training and ship soldiers to AIT units on Friday of graduation week in order for graduates to report for AIT on the date indicated in ATRRS.

c. Basic Combat Training installations must ship soldiers on time to ensure they arrive and link with their AIT course. Basic Combat Training installations must also establish a system to identify soldiers with critical AIT Hard-Start dates to ensure that appropriate actions are taken to enable those soldiers to meet their scheduled AIT start dates, provided they have met all graduation requirements.

d. One Station Unit Training units normally ship to the next unit of assignment NLT 1 day following graduation. Exceptions will be made for additional requirements for MOS-specific training, additional skill identifiers, and special requirements (e.g., security clearances).

e. Advanced Individual Training will be conducted based on the approved POI length, starting and graduating on the dates reflected in ATRRS. No additional time for a "zero week" or additional soldierization is authorized.

3-5. Training schedules.
a. The training week is managed through the training schedule. The principles of scheduling are outlined in FM 25-101. Local directives and the following guidelines will govern non-training time:

(1) In garrison, IET soldiers will have the opportunity for 7 hours of continuous sleep per night, unless the soldier is scheduled for duty (i.e.; fire guard or CQ runner). During field training, the length of the training day and time for sleep will vary based on tactical and other training requirements, as established in the appropriate POI. Commanders will ensure that the tactical framework of field training allows sufficient time for rest.

(2) In garrison, soldiers will be given at least 1 hour of preparation time each day to take care of personal needs. During this time, soldiers will not receive training.

(3) Soldiers will be afforded the opportunity to attend a religious service weekly.

b. Unless authorized by the installation commander, POI training will not be conducted on Sundays. Activities required to prepare for the next week's training may be conducted after 1300.

c. Unless authorized by the installation commander, core training requiring post assets will not be conducted on Saturdays or Federal holidays.

3-6. Lesson plans and instructor preparation.
a. The tasks and subjects in a POI form the basis for each period of instruction. Lesson plans will be prepared by the proponent and kept up-to-date for each period of instruction.

b. Each ATC and school will establish a system for monitoring and improving the quality of instruction. Essential to this is a standardization/certification process to ensure that each instructor is fully qualified and current in all aspects of their subject. This certification will be IAW TRADOC Reg 350-70. All IET instructors will accomplish semiannual physical fitness testing.

c. All IET cadre will accomplish semiannual physical fitness testing. All cadre responsible for conducting instruction and/or evaluating training will be certified on all hands-on phase tasks annually. Cadre in BCT/OSUT units will be certified on those phase tasks listed in the BCT POI and will also accomplish annual weapons qualification. Cadre in AIT units will provide reinforcement training on, and reevaluation of, those BCT common skills tasks selected by the commander. Records of all certification or qualification will be maintained at the battalion level.

3-7. Training records.
a. A DA Form 5286-R (Individual Training Record (ITR)) will be initiated and maintained by the soldier's assigned company for every soldier attending IET. The modified DA Form 5286-R, available in the Automated Instructional Management System-Personal Computer (AIMS-PC) database, will be used to document the completion of training requirements in all IET courses. This modified form streamlines the information required and provides a standardized reporting format for all IET sites. Additional guidance and a sample modified DA Form 5286-R is at appendix G.

b. Noncommissioned officers attending MOS producing courses in order to reclassify into another MOS, or prior-service personnel in the grade of E5 or higher enlisting IAW paragraph 2-17, will receive a DA Form 1059 (Service School Academic Evaluation Report) upon completion of their course, regardless of course length.

3-8. Makeup training. All training specified in a TRADOC-approved IET POI, as required for graduation, will be made up if missed. Make-up training for BCT and Phases I-III of OSUT will consist of training that will enable soldiers to meet mandated BCT graduation requirements as outlined in paragraph 1-5c(1). The quality of makeup training will be the same as that of regularly scheduled instruction. The soldier will be required to meet the performance/learning objectives specified in the POI for the instruction missed. Time required for makeup training will be determined locally.

3-9. Concurrent training. Concurrent training will be conducted as prescribed in applicable POIs. If not specifically prescribed by a POI, the training unit commander will schedule and conduct concurrent training. This training should be designed to reinforce critical soldierization skills, common skills, and human relations subjects (i.e., values, traditions, EO/POSH, etc.).

3-10. On-the-job training (OJT). On-the-job training is appropriate for those holdover soldiers who have completed all POI requirements and are retained in the unit for administrative purposes. Commanders and trainers must ensure that clearly stated OJT objectives are being achieved, and that soldiers involved are being employed productively in MOS or MOS-related duties.

3-11. Early arrivals/holds. Soldiers arriving early for a scheduled course, or soldiers in a hold status waiting for a training unit to fill, will be actively engaged in introductory training for the course they are to attend, and will not be used solely for performing details. This introductory training may consist of orientation, in-processing, PFT, and unit-taught subjects selected by the unit commander. These soldiers will be posted in ATRRS on the "HO" display as being in a hold status ("H") awaiting class start ("6"). The hold status for an "H-6" soldier automatically ends when the soldier starts training and is posted in a class in ATRRS with input status of "I."

3-12. TRADOC Pam 600-4 (IET Soldier's Handbook).
a. TRADOC Pam 600-4 will be issued to all soldiers entering BCT and OSUT. The pamphlet provides soldiers with a pocket reference for subjects taught and tested in

BCT, with emphasis on the tasks in the Soldier's Manual of Common Tasks (STP-21-1-SMCT).

b. Commanders will ensure that IET soldiers departing for AIT have a serviceable copy of the TRADOC Pam 600-4 in their possession.

3-13. Body composition standards in IET.
a. Accessions standards for body composition, as stated in AR 40-501 and message, DAPE-MPA, 211255Z SEP 95, Subject: Height, Weight and Body Fat Standards: Accession Versus Retention, apply during the first 6 months of the IET soldier's active duty service. The standards of AR 600-9 are applicable after the initial 6-month period.

b. Reserve component soldiers enrolled in the split-training option must meet accession body composition standards for the successive period of active duty training.

c. Initial entry soldiers will be measured and weighed within 7 days prior to graduation from AIT/OSUT. This information will be entered on the soldier's DA Form 5286-R.

d. Soldiers who exceed 6 months active service and fail to meet the body composition standards IAW AR 600-9 will be enrolled in the Army Body Composition Program and flagged. These soldiers will be shipped to the gaining unit and the documentation, to include the flag (transferable), will be forwarded to the gaining unit.

e. Prior service soldiers are required to meet the body composition standards of AR 600-9 upon reentry on active duty.

f. Reclassified soldiers (those soldiers currently holding a MOS) must meet the requirements of AR 600-9.

(1) Reclassified soldiers with temporary profiles, which prevent completion of the APFT, will not be enrolled in MOS producing courses.

(2) Soldiers in temporary duty (TDY) and return status will not be allowed to attend MOS producing courses if they do not meet the body composition standards as prescribed in AR 600-9. Soldiers not meeting standards will be returned to their home station.

(3) Soldiers in TDY enroute or PCS will not be allowed to attend MOS producing courses if they do not meet the prescribed body composition standards as prescribed in AR 600-9. These soldiers will be attached to the installation pending clarification of assignment instructions for follow-on training. The school commandant will notify U.S. Total Army Personnel Command (PERSCOM) of the soldier's ineligibility for schooling and request clarification of assignment instructions.

3-14. Drill sergeant uniform.
a. The drill sergeant's regular working uniform consists of the campaign/bush hat and battle dress uniform. The Class A uniform with campaign hat, and the Class B uniform with campaign hat, may be worn on appropriate occasions.

b. During periods of training which call for a tactical environment (e.g., tactical road marches, FTXs), unit cadre will be in the same uniform as the IET soldiers. During all other periods of training, the drill sergeant will wear the prescribed drill sergeant uniform.

c. For PFT, the uniform for IET soldiers and cadre will be the Army issue physical fitness uniform (PFU). Installations may use a variety of color-coded road guard vests or reflective equipment to distinguish between IET soldiers and cadre.

3-15. Initial entry soldiers held over for security clearance.
a. Initial entry soldiers who have enlisted for MOS training that requires a security investigation will be processed IAW AR 612-201.

b. Installation security managers are authorized to grant interim collateral security clearances in the name of the Commander, Central Clearance Facility (CCF), Fort Meade, MD, to qualified IET soldiers of all components IAW AR 380-67, so they may enter training. Memorandum, DAMI-CH, Headquarters, Department of the Army (HQDA) ODCSINT, 19 Feb 99, subject: Personnel Security, provides adjudicative guidelines for determining eligibility for access to classified information. The intent is to move all qualified IET soldiers to the AIT location.

c. Installation Security Managers must receive authorization from CCF to ship soldiers who require interim clearances with Sensitive Compartmented Information (SCI) access prior to shipment to AIT locations. Soldiers may depart AIT/OSUT with an interim collateral clearance, provided they have a National Agency Check/Local Area Check investigation favorably pending at the Defense Security Service or Office of Personnel Management.

d. Memorandum, ATBO-BP, HQ TRADOC, 14 Apr 97, subject: Renegotiation of MOS for Holdover Trainees Pending Security Clearances, provides information and guidance on processing trainees in security hold status. Initial entry soldiers holding MOS identified in table 3-1, who have known major derogatory information, will be considered security holdovers at BCT installations until a U.S. Army Central Personnel Security Clearance Facility (USACCF) Letter of Intent is received or a favorable security clearance determination has been made by USACCF. Initial entry soldiers must have an interim clearance by the AIT week listed in table 3-1 to continue training.

e. Initial entry soldiers in MOS 98XL may ship to DLI for language training. Initial entry soldiers in MOS 98G (Heritage Speakers) may ship to Goodfellow Air Force Base, TX for additional language and military subject training.

f. Soldiers reclassifying into another MOS requiring a security clearance may not ship until the appropriate clearance requirements for that MOS have been met.

Table 3-1
MOS security clearance requirements

MOS	KNOWN DEROGATORY INFORMATION	REQUIREMENT TO CONTINUE TRAINING
13C	Security Holdover at BCT	Interim Secret required by Week 3 of AIT
13R	Security Holdover at BCT	Interim Secret required by Week 4 of AIT
14 Series	Security Holdover at BCT	Interim Secret required by Week 2 of AIT
96B	Security Holdover at BCT	Interim Secret required by Week 1 of AIT Interim **TOP SECRET W/SCI** by Week 12 of AIT
96D	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 1 of AIT
96H	Security Holdover at BCT	Interim Secret required by Week 1 of AIT
96R	Security Holdover at BCT	Interim Secret required by Week 5 of AIT
96U	Security Holdover at BCT	Interim Secret required by Week 1 of AIT
97B	Security Holdover at BCT	Interim Secret required by Week 1 of AIT Interim **TOP SECRET W/SCI** by Week 10 of AIT
97E	Security Holdover at BCT	Interim Secret required by Week 5 of AIT
98C	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 1 of AIT
98H	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 5 of AIT
98J	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 1 of AIT
98K	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 1 of AIT

3-16. Competition and awards.
a. In general, soldiers and units are to compete against common standards rather than against each other. Competition should recognize each soldier or unit that meets or exceeds these standards.

b. All levels of command must constantly monitor competitive programs and ensure that competition supports, rather than detracts, from training objectives.

c. A comprehensive award system should be established within each ATC/school. This system should provide recognition for both IET soldiers and cadre personnel.

d. Care will be taken to ensure statistics do not assume major importance and create undue pressure on the IET soldier or the cadre.

3-17. Initial Entry Training soldier details.
a. Use of IET soldiers for details will be held to a minimum. The type and frequency of details to be performed by soldiers will be strictly controlled.

b. As appropriate, consideration will be given to using an entire unit (section, squad, platoon, class, or company) to meet requirements, rather than distributing the requirement over several different units. This will lessen the need for individuals to make up training, and provides additional opportunities for building teamwork.

c. To the maximum extent feasible, IET cadre will supervise IET soldiers when they are performing details. In cases where non-IET cadre are supervising IET soldiers, the supervisor will have attended the SCTC or ISCTC. Maximum effort will be made to utilize this time for reinforcement of soldierization skills.

d. Any civilian employee overseeing IET soldiers on a routine basis will be ISCTC qualified. The duties and responsibilities related to IET soldier management will be included in the civilian's official job description and on their annual performance evaluation.

3-18. Initial Entry Training soldier leaders.
a. Initial entry soldiers may serve as squad, crew, group, or section leaders and platoon guides during any or all phases of IET. Soldiers appointed as IET soldier leaders will be taught the functions, duties, and responsibilities of their positions prior to assuming those duties.

(1) Initial entry soldiers are authorized to wear brassards indicating rank (corporal for squad, crew, group, or section leaders; sergeant for assistant platoon sergeants) as outlined in AR 670-1. They are not to be considered as NCOs, nor accorded the privileges of NCOs.

(2) Initial entry soldiers for reclassification training, or who have prior service, may be appointed to leadership positions identified above.

(a) Reclassified and prior-service soldiers in the grades private through specialist are authorized to hold IET soldier leader positions, but are not to be considered as NCOs. Privileges will be IAW paragraph 2-17c(6).

(b) Noncommissioned officers will wear their authorized rank, and be considered and treated as NCOs. Privileges will be IAW paragraph 2-17c(6).

b. Initial Entry Training soldier leaders will not be assigned responsibility for a mission or function that is normally the responsibility of a permanent party soldier. Initial entry training soldier leaders will be allowed to use their initiative, authority, and to assume

responsibilities commensurate with their position, experience, and ability while under supervision of IET cadre.

c. Initial entry training soldier leaders will not be used as primary instructors during formal instruction. They may be used as assistant instructors, provided such duty or preparation does not keep them from scheduled instruction.

3-19. Medical/dental treatment.
a. Soldiers will be informed of sick call procedures upon arrival in their training units. Key information on sick call and emergency medical/dental procedures will be posted conspicuously. Soldiers will be instructed on the need to seek prompt medical attention regardless of interruptions in their training.

b. Medical treatment facilities will use approved forms to document soldiers' medical problems, treatment received, and prescribed courses of action/treatment.

(1) TRADOC Form 385-2-5-R-E, Record of Injury. In cases of accident or injury, the unit will use this form in place of DD Form 689. Units will ensure that all individuals injured during training or mission sustainment report to troop medical facilities with a completed TRADOC injury form. Section I of this form will be completed by the supervisor (military or civilian) and given to the injured person, or medical transport personnel if the individual is incapacitated. The form will be taken to the medical treatment facility and given to the medical officer or attendant performing medical treatment. Detailed guidance on the use of this form is contained in TRADOC Regulation 385-2. TRADOC Form 385-2-5-R-E is shown at appendix H (fig H-1).

(2) DD Form 689, Individual Sick Slip. The unit uses this form to authorize a soldier's medical and/or dental treatment. The medical treatment facility completes the form and annotates the patient's disposition. The health care provider should include information on activities the soldier can perform, as well as any physical limitations imposed. This form may also be used to record temporary physical profiles of 30 days or less in duration. Detailed guidance on the use of this form is contained in AR 40-501. A DD Form 689 is shown at appendix H (fig H-2).

(3) DA Form 3349, Physical Profile. This form may be used to record both permanent profiles and temporary profiles in excess of 30 days in duration. Temporary profiles written on DA Form 3349 will not exceed 3 months in duration, except in specific circumstances outlined in AR 40-501. A DA Form 3349 is shown at appendix H (fig H-3).

c. Initial entry soldiers who miss three or more consecutive full days of training due to illness or injury will be reported in ATRRS as a "Medical Holdover." Soldiers will remain coded as "Medical Holdovers" until they have recovered from their illness/injury, or for as long as they remain on a profile. Once the profile has expired, the soldier will resume training and be removed as a "Medical Holdover" in ATRRS.

d. Graduates of BCT on temporary profiles will not be shipped to their AIT units.

e. Phase IV and V IET soldiers who are injured and receive permanent profiles prior to graduation will be evaluated to determine if they are fit for retention. Soldiers determined fit for retention will be evaluated against MOS Physical capacity or stamina, Upper extremities, Lower extremities, Hearing and ear, Eyes, Psychiatric (PULHES) minimums. Initial entry soldiers meeting MOS minimums will continue training IAW their profile. Installation Adjutant Generals will contact PERSCOM to negotiate a new MOS for those who fail to meet PULHES minimums. Soldiers determined not fit for retention will be separated.

3-20. Personal health and hygiene.
a. To instill good hygiene habits in all soldiers, each installation will establish a comprehensive personal hygiene program.

b. Each installation will provide soldiers an orientation on proper nutrition; good dietary habits; the adverse effects of alcohol, drugs, and tobacco products; stress management; Human Immunodeficiency Virus prevention education; and the Army Health Promotion Program.

c. Commanders and leaders, in cooperation with installation medical authorities, and as appropriate, safety and fire and emergency services staffs, will implement a comprehensive program to ensure the adequacy of billeting and maintenance of sanitary, healthful conditions.

3-21. Prevention of heat and cold injury.
a. Installation commanders will develop and implement detailed programs for prevention of heat and cold injury. TRADOC Reg 350-29, technical bulletin (TB) medical (MED) 507, and TB MED 81 will be used as the bases for locally developed programs. Commanders should also coordinate with the local Medical Department Activity Preventive Medicine Service for assistance in developing their programs.

b. As a minimum, programs will provide the following:
(1) An acclimatization period for new soldiers at the beginning of all training cycles. Initially low exertion levels that increase gradually will mark activity during this period. All soldiers will receive a mandatory briefing or class on prevention of heat/cold injuries as part of in-processing.
(2) A notification system to ensure that each commander, drill sergeant, and instructional committee member knows the current wet bulb globe temperature (WBGT) indexes and wind chill factors. Ensure that one portable WBGT kit (NSN 6665-00-159-2218) per training company (BCT, OSUT, and AIT) is issued. Cadre members will have the pocket-sized graphic training aid (GTA) 5-8-12, or another suitable locally produced GTA, with them during training.
(3) A specific local policy on training activities that may and may not be conducted during the various WBGT indexes/wind chill factors. Policies should include the statement that during cold weather, use of non-standard portable space heaters is prohibited in field training and operations.

3-22. Severe weather notification. Severe weather notification plans will be developed, coordinated, and periodically tested. These plans will include the requirement for units/activities to acknowledge the receipt of such notification. The organization issuing the warning should maintain a log of the time of notice, receipt of acknowledgement(s), and person(s) acknowledging receipt.

3-23. Hearing conservation program. Exposure to high intensity noise may cause permanent hearing loss, which can affect combat efficiency. Each ATC will follow a hearing conservation program IAW AR 40-5 and DA Pam 40-501. Commanders at all levels will enforce the requirement for all IET soldiers, instructors, and cadre to wear earplugs, or other approved hearing protective devices, when exposed to noise levels (e.g., range firing) that may be hazardous to hearing. Leaders are responsible for ensuring the hearing conservation program is implemented in their units, especially the monitoring and enforcement of wearing hearing protection in noise hazardous areas.

3-24. Safety.

a. Realistic training exercises will be conducted within the bounds of an effective risk management program. Before training, all cadre and IET soldiers will be thoroughly briefed on the risks associated with each specific training event/activity. This will include identification of specific hazards and those controls to be used to reduce the risk of accidents associated with the training event. IET risk assessment will address all applicable safety procedures and potential accident-producing conditions. Unusual vehicle, water, weapons safety considerations, and environmental hazards in training areas will be stressed prior to and during the training. Training cadre will be proactive and aggressive in reducing/preventing training injuries and fatalities.

(1) Each installation will establish standard procedures to ensure that emergency treatment is readily available during training.

(2) TRADOC service schools and major subordinate commands will apply risk management techniques to eliminate or control hazards associated with proponent TSPs IAW guidelines established in TRADOC Regs 350-70 and 385-2. All TSP risk assessments will be reviewed and validated by the safety manager.

(3) Unit commanders will ensure all safety controls identified in the risk management worksheets are implemented prior to the start of training.

(4) The instructor will integrate the appropriate safety/caution statement into each task, and evaluate the performance of the soldiers while they perform the task to the prescribed standard.

(5) All training safety is built on a three-tiered approach (command, leader, individual) to safety.

(a) Tier 1 is commanders' business: validating the structural soundness of the training and evaluation plan for safety, ensuring safety-related matters are addressed, and making risk acceptance decisions.

(b) Tier 2 is first-line leaders' business: considering actions to be taken by responsible individuals, establishing a safety overwatch of training, focusing on adherence to standards, and making risk acceptance decisions within their commander's intent and delegated authority.

(c) Tier 3 is at the individual level - everyone's business: ensuring soldiers look after themselves and others, and know how to recognize unsafe conditions and unsafe acts. Soldiers must meet their individual responsibilities for safety, and be able to recognize and report unsafe acts to leaders.

b. Commanders will also ensure that cadre and IET soldiers are aware of the appropriate procedures for reporting suspicious or adverse incidents during non-training hours. Examples would be (but not limited to) actual or suspected instances of fire, theft, altercations, suicide gestures or attempts, injury, unusual health symptoms, or any other unusual behavior or event.

3-25. EXODUS. Headquarters TRADOC will establish and announce the training policy for EXODUS based on annual guidance published by HQDA for the holiday season. The point of contact (POC) for EXODUS is HQ TRADOC, ATTN: ATOM-O. Local commanders will establish policy for soldier conduct while on EXODUS leave.

3-26. Hometown Recruiter Assistance Program (HRAP) execution.
a. The United States Army Recruiting Command established the HRAP as a way for the Army to interface with local communities. In the program, selected graduates return to their hometowns and work with local recruiters to promote and explain the opportunities available in the Army. Additional information on the program is provided at appendix I.

b. The Army National Guard (ARNG) executes its own HRAP as a way for the Army Guard to interface with local communities. Soldiers approved to participate in the ARNG HRAP will report to and be briefed by the ARNG Liaison NCO at each installation. The ARNG Liaison NCO will work with individual state headquarters for coordination. On an annual basis, National Guard Bureau Strength Maintenance Division (NGB-ASM) will provide additional information on the program.

3-27. Nuclear, Biological, and Chemical (NBC) training.
a. Practical NBC exercises will be integrated in bivouac, weapons firing, MOS tasks, and similar training to increase individual proficiency and confidence. The BCT and OSUT POI proponents will include requirements that enable IET soldiers to progress to wearing mission-oriented protective posture (MOPP) IV equipment for at least 4 consecutive hours.

b. Health and safety considerations pertaining to NBC training are contained in FM 3-100, FM 21-10, and TB MED 507. Weather conditions and WBGT readings may affect MOPP IV wear. The soldier's training records will be annotated to show the number of hours of continuous wear of MOPP IV equipment. During periods of warm weather, training time on MOPP IV may be reduced. FM 3-4 contains performance degradation data that is helpful in making this determination.

3-28. Advanced Individual Training field training exercise (FTX).
a. Each AIT and OSUT course will include a 72-120 hour, scenario-driven, tactical FTX. The FTX will reinforce previously learned MOS and common soldier tasks/skills in a realistic, tactical environment.

b. The FTX should avoid the introduction of new, testable training, but should focus on the application of MOS technical tasks and reinforce soldier survival skills.

c. Field training exercises should be conducted in an austere field environment under all weather conditions, at night as well as day, to replicate the stress, sounds, and conditions of the battlefield.

d. The FTX will be conducted during the final 4 weeks of training. During the FTX, soldiers will undergo a series of events exposing them to the rigors of duty performance during field operations. The intent of the FTX in AIT is to integrate MOS and combat survival skills into a simulated tactical scenario, and give soldiers the opportunity to demonstrate their newly learned skills under realistic conditions. The FTX will be addressed in a separate module in the POI.

e. Exceptions to FTX requirements must be submitted to HQ TRADOC, ATTN: ATTG-IT for approval by the CG, TRADOC.

3-29. Advanced Individual Training feedback system. Advanced Individual Training commanders and other recipients of soldiers from BCT installations will provide direct feedback to BCT commanders on the quality of the soldiers they receive. Some topics for discussion may include morale on arrival, medical condition, common task proficiency, physical condition, DA Form 5286-R completion, completeness of training records, and possession of TRADOC Pam 600-4.

3-30. Phased testing for BCT.
a. Phased testing, prescribed by the BCT POI, will be administered to all BCT soldiers.

b. The U.S. Army Infantry School is responsible for the design and content of phased tests.

c. Training, particularly unit reinforcement training, will emphasize preparing soldiers to correctly perform BCT tasks.

d. General guidance for the conduct of the testing is as follows:
(1) Tests will be scored on a "GO/NO-GO" basis.
(2) Soldiers receiving a "NO-GO" will be counseled and given remedial training on the task(s) not passed.
(3) Soldiers will be retested on the task(s) for which they received a "NO-GO."
(4) An AAR will be conducted at the completion of training.

3-31. Testing procedures for AIT and the MOS portion of OSUT.
a. Proponents will develop within-course tests (end-of-annex/block/module) for MOS-producing courses according to guidance outlined in TRADOC Reg 350-70. The validity of each task being evaluated and its relevance will be continuously assessed and changed or modified as appropriate.

b. Commanders will ensure soldiers are tested IAW the SEP for the course being presented. Guidelines for development of SEPs are outlined in TRADOC Reg 350-70, Chapter VI-7, Student Performance Measurement/Testing. The SEP informs soldiers, instructors, and other personnel of the course graduation requirements. A copy of the SEP must be explained to each IET student at the beginning of each course and prominently posted on the bulletin board.

c. Within-course tests must provide a fair and accurate evaluation of the soldier's ability to perform the tasks presented to established standards.

d. Hands-on, performance-oriented testing will be the norm throughout TRADOC. If situational-based, open-book reference written tests are used, they must require the student to not only extract data, but also to apply the data to specific situations likely to be encountered on-the-job. Closed-book, knowledge-based written tests should be used only if it is necessary to verify the learner's knowledge as a prerequisite for later performance testing where the knowledge must be used (e.g., as a building block to later tests). All testing should be conducted in an environment that would replicate the soldier's duty position in the unit in so far as safety and environmental considerations will allow and IAW test administration instructions.

e. Each test will have at least two versions. All versions may be used concurrently.

f. Tests will be monitored by quality control personnel reporting to the brigade or ATC commander, as determined by the local commander. Unit cadre personnel must be certified IAW TRADOC Regs 350-70 and 350-18 before they are permitted to participate in the testing process.

g. Tests will be scored on a "GO/NO-GO" basis. The passing ("cutoff") score for making the "GO/NO-GO" determination will be determined during test design and validation, and will be documented within the course Student Evaluation Plan.

h. Counseling will be conducted with each soldier to reinforce strengths on tasks accomplished, and to correct weaknesses on tasks missed.

i. The goal should remain 100 percent performance to standard on all tasks by each soldier. Soldiers who are unable to achieve this goal should be considered for remedial training and re-testing prior to graduation, or reassignment to another company in a follow-on cycle.

j. Remedial training is a joint responsibility of students and trainers. As such, students failing to achieve task/course standards must be provided opportunities to review material, and practice skills prior to undergoing retest. Trainers must provide appropriate remedial assistance as necessary.

k. Re-testing will include all tasks failed.

l. In accordance with the Student Evaluation Plan, IET soldiers who fail an end-of-annex/block/module retest are prohibited from progressing further in the course and should be considered for new start to a follow-on class or elimination.

3-32. New Start program.
a. Initial entry soldiers who demonstrate deficiencies in achieving task standards consistent with their time in training, but maintain the motivation to do so, will be considered for reassignment to another company or battalion. Reassignment should be made to a company in a later cycle (i.e., a succeeding class) where the soldier has the opportunity to repeat the phased training. These reassignments made under the New Start Program are intended to give the motivated soldier an additional opportunity to meet the skill standards and become a productive soldier for the Army. The success of the New Start Program is a direct function of the manner in which the soldier is integrated into the new unit.

b. Initial entry soldiers who have missed training due to emergency leave or hospitalization and will not be able to complete their training with their current unit, will be considered for reassignment to a company in the appropriate week of training.

c. Initial entry soldiers may be reassigned under the New Start Program at any point in the training cycle based upon the recommendation of the chain-of-command and approval of the battalion commander. Following the approval to reassign the soldier under the New Start Program, the soldier will be moved to the new company or battalion for further training NLT the following duty day.

d. Commanders will not remove soldiers being considered for new start from training until the decision is made. Initial entry soldiers will not be used as detail soldiers during the new start process. The goal is to get the soldiers back into training within 1 day of the decision to restart them. While there are case-by-case exceptions, the decision during IET is authorized as follows:

(1) When a soldier's performance is unsatisfactory in a certain area, the soldier will be given intensive remedial training and retested in that area. If performance remains unsatisfactory after remedial training and retesting, the soldier may be reassigned to another company or battalion in a follow-on cycle.

(2) New starts for academic retraining to complete AIT/OSUT will be granted IAW AR 612-201.

(3) Individuals who are unable to complete MOS training will be processed IAW AR 612-201.

e. Additional information on MOS retraining/ reclassification procedures is provided at appendix J.

3-33. Remedial training.
a. Soldiers unable to attain training standards will be provided remedial training to enable them to remain in cycle, rather than be given a new start in a follow-on cycle.

b. Soldiers who have not passed an APFT prior to graduation may be retained in the fitness training unit (FTU), or similar holding unit, for remedial training; however, they will continue to be reported as holds in ATRRS using REASON CODE "B: Physical Fitness (Remedial Tng-APFT)."

c. In keeping with the TRADOC investment strategy, a soldier will continue to receive remedial training so long as the chain-of-command determines the soldier has the mental and physical capacity to succeed.

3-34. MOS retraining/reclassification policy.
a. The TRADOC IET retraining policy is as follows:
(1) A soldier unable to qualify for a MOS after the first training assignment may be considered for retention in the Army and qualify for additional skill training in a second MOS only if:
(a) In the judgment of the commander, the soldier possesses those qualities which are considered exceptional; and
(b) The soldier demonstrates the motivation and potential to successfully complete the second MOS training.
(2) In all other cases, soldiers who do not meet academic standards will be properly counseled and processed for separation IAW AR 635-200.

b. This policy was established to enhance efficiency, productivity, and morale in both the training base and the units to which MOSQ soldiers are ultimately assigned. It is designed to allow IET cadre to concentrate on trainable soldiers and to reduce workload associated with IET soldiers whose attitude and performance create an unwarranted administrative burden. The objective is to eliminate disruptive, less productive IET soldiers who have an adverse impact on unit esprit and the training environment.

c. Commanders should use all available assets in handling disruptive and nonproductive soldiers. Unit Ministry Team (UMT) support is provided in each IET battalion. These, along with installation law enforcement and medical personnel, are valuable assets trained to assist IET soldiers, cadre, and senior leadership in resolving problems, and should be used as appropriate.

d. Battalion commanders will determine whether soldiers who are unable to achieve MOS graduation requirements merit a second opportunity, or they should be processed for elimination from the Army. Additional guidance on retraining/reclassification procedures is provided at appendix J.

3-35. Separations.
a. Attainment of Army standards is the gauge for successful completion of IET. New soldiers are to be given reasonable opportunities to demonstrate their potential for continued service. Commanders will exhaust retraining and counseling procedures before making a determination that a soldier's performance and potential worth to the Army justifies a new start or separation from the service. Commanders will not begin any separation actions against a RC soldier prior to the local ARNG/United States Army Reserve (USAR) liaison personnel counseling the soldier.

b. No soldier can be released from training and processed for separation without the approval of the battalion commander. Upon approval, the soldier will be removed from the platoon environment and a separation action processed immediately. Once the proper authority approves the separation packet, the discharged soldier should be out-processed within 3 working days. These soldiers will be reported in ATRRS in a hold status using REASON CODE "T: Trainee Discharge Program."

c. Soldiers in BCT/OSUT (to include soldiers who were assigned to the FTU for 1 to 4 weeks) normally will not be separated for reasons of lack of motivation or aptitude prior to completion of their second week of training. Time spent in the FTU will not be counted toward those 2 weeks. This will provide new soldiers a fair adjustment period, and allows the command an opportunity to evaluate and counsel the soldier. However, commanders will ensure that highly disruptive soldiers are removed from the platoon environment, and the appropriate administrative or disciplinary actions are taken.

3-36. Conscientious objectors.
a. Policy and procedures for processing conscientious objectors is provided in AR 600-43. Soldiers who have submitted applications will be retained in their unit and assigned duties providing minimum practicable conflict with their asserted beliefs, pending final decision on their applications. They will not be required to train in the study, use, or handling of arms or weapons.

b. The soldier is not precluded from taking part in those aspects of training that do not involve the bearing or use of arms, weapons, or munitions. Except for this restriction, conscientious objector applicants are subject to all military orders, discipline, and regulations to include those on training.

3-37. Inspector General (IG) system briefing. Commanders' orientations in BCT/OSUT and AIT units will include a briefing on the IG system. Specifically, this briefing must cover the role of the IG, their function, how soldiers can get appointments to see the IG, and how the IG might help the soldier with a problem.

3-38. Suicide prevention.
a. Commanders' and UMTs' orientations in IET units will include instruction on suicide awareness/identification. Instruction to soldiers will include the appropriate actions to take in the event a fellow soldier talks to them about suicide; specifically, soldiers must

recognize the need to immediately notify the first cadre member available in the chain-of-command.

b. Commanders must comply with the provisions of DOD Directive 6490.1, Mental Health Evaluations of Members of the Armed Forces, before sending soldiers for mental health evaluations. Commanders and cadre must be familiar with this directive to avoid violations of legal statute and public law. Commanders must counsel soldiers reported to have discussed or alluded to suicide. The commander will ensure soldiers in emergency/urgent situations are immediately referred to mental health personnel for counseling and evaluation, and accompanied by a NCO to the appointment until the mental health professional assume control. At no time will soldiers in this category be left alone or unsupervised. Escorts for subsequent appointments are not required to be a NCO. Individuals in routine (non-emergency) situations will be counseled IAW DOD Directive 6490.1 prior to referral/meeting with mental health professionals.

c. Commanders must counsel soldiers who are reported to have discussed or alluded to suicide. The commander will refer any soldiers suspected of contemplating suicide to mental health personnel for evaluation and counseling. The commander will provide an escort of greater rank than the soldier, but at least a NCO, to accompany the soldier until mental health personnel assume control. At no time will the soldier be left alone and unsupervised.

3-39. Retraining and holding units (RHUs).
a. Basic Combat Training/One Station Unit Training installations will establish company-size RHUs to perform two functions:

(1) Process soldiers pending discharge. Retraining and holding units will process IET soldiers identified by the chain-of-command for discharge from the Army under provisions pertaining to administrative entry-level separation.

(2) Retrain selected IET soldiers. Retraining and holding units will provide special training to selected IET soldiers who have the potential to complete training with additional time/assistance.

b. Soldiers in each category will be managed and housed in separate groups.

c. All Reserve Component service members will receive counseling from the Reserve Component Liaison Office prior to assignment to the RHU.

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Chapter 2
Administration

2-1. Entry into the DSP.

a. In accordance with AR 614-200, soldiers may volunteer or be selected by Department of the Army (DA) for DS duty.

b. All drill sergeant candidates must meet the requirements outlined in AR 614-200, paragraphs 8-15 through 8-17.

c. Drill sergeant candidates are noncommissioned officers (NCOs) identified and notified by PERSCOM that they are scheduled to attend DSS and will be assigned against a DS personnel requisition. Candidate status will not begin more than 45 days prior to their class start date.

2-2. Entry into the RC DSP.

a. Qualified RC personnel may enter the program by either volunteering or enlisting for DS vacancies in the RC training divisions. The RC DSC must meet the prerequisites of AR 614-200 to qualify for the program. They will attend either the DSS of the division to which they are assigned or an AC DSS. All candidates will be graduates of the Primary Leadership Development Course prior to attending DSS. Prior service personnel, who were instructor-qualified in the Navy, Marines, or Air Force, must still go to the required AC or RC DSS.

b. All RC personnel, sergeant (SGT) through sergeant first class (SFC), who complete DSS and are assigned to a training unit, will be awarded the SQI "X."

c. Reserve Component candidates in rank SGT through SFC may volunteer and be selected for attendance at an AC DSS. When a RC candidate is selected to attend an AC DSS, direct coordination between the DSS commandants is authorized. Candidates must have the required uniforms and adequate funds to cover expenses during the period of training.

d. Reserve Component may have the following waived:

(1) Basic Noncommissioned Officer Course requirement.

(2) Time-in-service requirement reduced to 3 years.

(3) Rank to corporal (however, to attend AC DSS, soldiers must be appointed as an acting SGT (AR 140-158)).

2-3. Drill Sergeant School Course Program of Instruction.

a. The DSSC POI, which is approved by Commander, TRADOC, is directive in nature. Do not implement deviations from the POI without the written approval of Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, Fort Jackson, SC 29207-5315.

b. Policy. The USATC and Fort Jackson Drill Sergeant Proponent Program will act as the proponent and approval authority for the content and execution of the DSSC. The DSPP is responsible for updating and evaluating the POI.

c. The course will be conducted IAW the DSSC POI, with small group instruction (squads consisting of 8 to 20 assigned candidates). The DS leaders will lead and instruct their squads throughout the course (two DSLs per squad).

d. Drill Sergeant School commandants will monitor the execution of the POI and report candidate attrition during each class using TRADOC Form 350-R (Drill Sergeant Course Performance) (RCS ATTG-35 (R2)). Instructions for completion are on the back of the form. (See app B for additional information.) The DSS commandants will also conduct a complete review of any course with an overall attrition over 12 percent, to determine causes. This review is a tool for quality control and product improvement and is not to be used as an attempt to lower the standards. Forward the analysis, along with TRADOC Form 350-R, to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315, and Commander, TRADOC, ATTN: ATTG-X, 11 Bernard Road, Fort Monroe, VA 23651-1001.

e. Procedures for submitting and recommending changes to DSSC material. Submit all recommendations to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315 for review/approval.

2-4. New-start program (AC and RC).

a. Commandants will not new-start candidates who fail to achieve course standards without prior approval/coordination from Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, Sumter Street, Fort Jackson, SC 29207-5315, and DA PERSCOM, ASTAPC, ATTN: TAPC-EPK-ID, 2461 Eisenhower Avenue, Alexandria, VA 22331-0452. Send the request for new-start through DSPP office to PERSCOM (the approval authority for new-starts). The recommendation to new-start a candidate for failing to achieve course standards will be granted on a **one-time only** basis. If the reassignment is made and the candidate still fails to achieve the standards, the commandant will remove the candidate from the DSSC IAW this regulation and AR 614-200.

b. Complete all new-start reassignments, regardless of circumstances, within 60 training days for AC and 6 months for RC. Soldiers who experience difficulty in one course area, but are otherwise exceptional and maintain motivation, may be new-started on an exception basis. Commandants must decide to new-start a candidate before the candidate is given a one-time only fourth attempt. After using a fourth (final) attempt, no new-starts are permitted. Reassignment will be made to the first available class (AC or RC) where the candidate has the opportunity to continue from the necessary block of training. The intent is to have the candidate back into training as soon as possible from the time the decision is made.

c. Candidates who have missed training due to emergency leave or hospitalization, and will not be able to complete the course with the initial class, will be new-started to the next available class. If this reassignment is not completed within 60 training days for AC and 6 months for RC, the commandant will release the candidate IAW AR 614-200 and this regulation (administrative release).

d. Reserve Component (RC) DSC, who are unable to attend two annual training (AT) periods due to a conflict (e.g., civilian job, civilian school, etc.), can be new-started. However, the DSSC will be completed within 18 months. These circumstances will be handled on a case-by-case basis and must be approved by Commander, USATC and Fort Jackson ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

e. Candidates will not be new-started for failing their final attempt on the Army Physical Fitness Test (APFT).

2-5. Relief of DS candidates from the Drill Sergeant School Course.

a. Drill sergeant candidates may be removed from the DSSC without being removed from the DSP. Candidates removed from the course may be considered for DS duty in the future and may be given a new DSS class date.

b. Drill Sergeant School commandants are designated as the approval authority to remove candidates from the DSSC, provided they are not recommended for removal from the DSP. All adverse academic evaluation reports (AERs) must be referred or forwarded in memorandum with student acknowledgement. The endorsement must indicate the candidate’s intent with regard to appeal.

c. Installation, U.S. Army Training Center, separate brigade and/or appropriate equivalent commanders may remove Active Army soldiers from the DS Program (while in candidate status or while assigned DS duties). Removal authority must be at least colonel level command and may be delegated to subordinate commanders or deputy commanders/commandants in the grade of colonel or higher including commanders/commandants of other Services. Policy governing relief from DS duty for USAR soldiers is contained in AR 140-10. Removal may be for any of the following reasons:

(1) Arriving unqualified to DS school (soldiers that do not meet the course prerequisites, including body composition requirements in AR 600-9).

(2) Failure to pass the APFT. (See AR 350-41.)

(3) Academic failure (DS school).

(4) Temporary medical reasons that will prevent soldier from completing the DSSC in the specified time.

(5) Administrative (emergency leave, etc.).

(6) Failure to maintain high standards of military appearance, military courtesy, bearing, conduct and/or professionalism, including noncompliance with body composition requirements in AR 600-9 and testing positive for drugs.

(7) Infractions of training policies or violations of the Uniform Code of Military Justice (UCMJ).

(8) Lack of proper motivation, provided individual counseling has been unsuccessful, including failure to enter or complete DS school.

(9) Medical reasons, including pregnancy, when condition prevents soldier from performing DS duties.

(10) Hardship or family problems that prevent soldier from performing DS duties.

d. Procedures for removal action:

(1) The DSS commandant will evaluate all candidates recommended for removal from the DSSC (can be delegated to the satellite schools in RC). In cases where the commandant determines that removal is warranted, the following procedures apply:

(a) The DSS commandant will notify the candidate in writing of the proposed action, basis for the action, consequences of disenrollment, and right to appeal. Candidates must submit an appeal within 48 hours for AC and 30 days for RC after receipt of written notification. If RC candidates attend an AC school, the AC rule for appeals applies.

(b) The DSS commandant will receive an endorsement from the candidate that acknowledges a counseling session was held and an elimination notice was received. The endorsement also must indicate the candidate’s intent with regard to appeal.

(c) All adverse AERs must be referred to the student with memo for acknowledgement and comment.

(d) The reviewing authority for cases regarding appeals will be the approval authority for removal from the DSP. The DSS commandant will review all appeals for accuracy and formatting, before sending the removal packet to the approval authority, IAW 614-200. After the appeal packet is completed, the commandant will forward the entire packet to the approval authority. If a DSC is being processed for both removal from the DSSC and the DSP, the commandant will execute the DSC removal and then refer it to the Training Center Commandant with the recommendation that the DSC be removed from the DSP IAW AR 614-200, paragraph 2-6.

(2) Intermediate levels of command will not delay the recommendations from reaching the approval authority. No more than 72 hours will lapse between transmittal of recommendation by the commandant and receipt by the approval authority. Candidates should remain in training until the approval authority notifies the commandant of the final decision. Candidates can be removed from training if they are disruptive and interrupt an environment conducive to learning, or have elected not to appeal the dismissal.

(3) Active Component NCOs, who are removed from the DSSC, will be returned to their unit.

(4) When a RC DS candidate is removed from an AC DSS, the AC DSS commandant will initiate a DA Form 1059 IAW AR 623-1 and notify the candidate's division. When matters of judicial or nonjudicial punishment are involved, the AC commander with jurisdiction should consult with the candidate's commander to coordinate actions being pursued.

(5) The DSS commandant will notify the unit CSM of each candidate's removal from the DSSC/DSP. A letter from the approval authority will specify the reasons for removal.

(6) The commandant will submit a copy of the removal packet for every candidate being removed from the DSSC/DSP to PERSCOM, ATTN: TAPC-EPK-ID, 2461 Eisenhower Avenue, Alexandria, VA 22331 IAW 614-200, paragraph 8-18, and Commander USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

e. Appeals process:

(1) The appeal and reinstatement approval authority for DS removed from the DS program will be no lower than the first general officer in the soldier's chain of command and will always be a general officer higher in grade than the designated removal authority.

(2) Appeals to DS removal actions must be acted upon, and final decision provided to PERSCOM (TAPC-EPK-ID), within 20 calendar days from the date of the soldier's removal from the DS program. An appeal that is not acted upon within the allotted time period must be forwarded to the Commanding General (CG), PERSCOM, for action. Appeals that must be acted upon by the CG, PERSCOM, as indicated in paragraph 8-18j, must be submitted to the CG, PERSCOM, within 20 calendar days of the date the soldier was removed from the DS program.

f. A candidate's failure to complete the DSSC, in 45 academic days, will result in academic removal, IAW the DSSC POI.

g. The RC DSSC must be completed within 18 months. All course requirements must be met by DS scheduled class graduation date.

h. Medical removals will be made in cases of illness, injury, or a medical profile that results in unreasonable delays in training or loss in training time. The DSS commandants will determine if the candidates have the potential to make up the missed training. All course requirements must be met by the scheduled class graduation date.

2-6. Relief of DS candidates from Drill Sergeant Program.

a. Drill sergeant candidates may be removed from the DSP for cause before or during DSS. Candidates removed from the DSP will not be considered for DS duty in the future. Reasons for

removal and report procedures are established in AR 614-200 and this regulation.

b. Army training center/RC training division commanders are designated as the approval authority to remove RC DSC from the DSP. This authority may be delegated to subordinate commanders in the rank of colonel or higher with removal authority.

c. The approval authority will promptly review the circumstances of the case and decide upon the candidate's removal from the program IAW AR 614-200. The entire action, from submittal by the DSS to the disposition by the approval authority, will not exceed 5 training days. Active Component NCOs, who are removed from the DSP, will be returned to their unit.

d. The DSS commandant will notify the unit CSM of each candidate's removal from the DSSC/DSP. The approval authority will make notification through a letter, specifying the reasons for removal.

e. The commandant will submit a copy of the removal packet for every candidate being removed from the DSSC/DSP to PERSCOM, ATTN: TAPC-EPK-ID, 2461 Eisenhower Avenue, Alexandria, VA 22331 IAW 614-200, paragraph 8-18, and Commander USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

f. Urine testing of AC/RC DS candidates. Commandants will administer a 100 percent urinalysis test to DSS candidates. The test will be administered within 3 training days after reporting to the DSS. The specimens will be collected and processed IAW AR 600-85 and U.S. Army Drug and Alcohol Operations Agency standing operating procedure. Soldiers performing DS duties or in DSC status, whose urine test is confirmed positive, will be removed from the DSP IAW AR 614-200.

2-7. **Assignment and use of DS candidates.**

a. Unit commanders are responsible for ensuring that the DSC has no issues that would prevent successful completion of DSS (i.e. personal, financial, or medical). If in the opinion of the unit commander, the DSC is not prepared to attend DSS as scheduled (e.g., prospective APFT failure, a limiting physical profile, overweight, etc.), the

commander will arrange for class deferment with the Post DS Strength Manager. The commander will determine if the candidate should be eliminated from the DSSC/DSP, if the candidate is still not prepared to attend the next available class.

b. Installation commanders have the option to assign a DSC to a training unit. During their assignment, the following requirements will be met:

(1) Drill sergeant candidates, both AC and RC, will be assigned a DS sponsor who will help prepare the candidate for DSS and monitor their activities in the unit. The DSC will spend the maximum amount of time preparing for DSS, closely observe unit training, and participate in as many training activities as time allows. The sponsor will ensure that DSC obtain/attend the appropriate certification requirements applicable to the installation before attending DSS (e.g., driver's safety, range safety, etc.). The sponsor will continually check the candidate's progress while in DSS.

(2) At no time will DSC be placed in positions where they are allowed total control of and/or assume responsibility for initial entry training (IET) soldiers. This includes, but is not limited to, marching soldiers, counseling soldiers, or acting in the capacity of primary instructor. Furthermore, the DSC will not be used in the following capacities; however, the DSC may accompany a drill sergeant (sponsor) in the performance of these duties:

(a) Charge of quarters.

(b) Staff Duty NCO.

(c) Sergeant of the guard.

(d) Commander of the relief.

(e) Kitchen police pusher.

2-8. Relief of drill sergeant from DS duties.

a. Army Training Center commanders/service school commandants, and brigade commanders in the grade of O-6 or higher are authorized to remove DS from DS duties. Specific reasons for removing DS from their duties and the DSP, and withdrawing the SQI "X" are contained in AR 614-200, paragraph 8-18. Army Training Center/Reserve Component training division commanders are designated as the approval authority to remove a RC drill sergeant from the DSP. This authority may be delegated to subordinate commanders in the rank of colonel or higher with removal authority.

b. Drill sergeants removed from the DSP may also lose the award of the "X" identifier if removed for disciplinary reasons. They will be restricted from wearing the DS patch. All appeals will be made to the DSPP and Chief of Staff for Personnel. Appeals will reach the DSPP within 14 days.

c. Drill sergeants removed from DS duties for cause, except for medical reasons to include illness or injury, will be reassigned to other duties that do not include contact with IET soldiers. Further guidance, regarding disposition of DS suspended from DS duties, will be found in AR 614-200, paragraph 8-18.

2-9. Assignment and use of DS.

a. Active Component and RC DSS graduates assigned in DS positions are authorized Special Duty Assignment Pay (SDAP) (to include RC performing DS duties on active duty for training and inactive duty training missions). Drill sergeants on status will be assigned and used only in authorized DS positions. Drill sergeants will not perform major additional duties that divert them from their primary duty of a DS. Additional company duties such as nuclear, biological, chemical NCO, physical security NCO, and equal opportunity representative (EOR) are authorized.

b. If a DS is put in a non-DS position, SDAP will be lost for the length of time spent in the non-DS duty position.

c. If for a period not to exceed 90 days, a unit does not have a first sergeant (1SG) assigned, a DS may be temporarily appointed to act in the 1SG position. However, in order for the DS to continue to receive SDAP, they must maintain their primary position as a DS.

2-10. Annual DS certification. Drill sergeants, assigned to BCT/OSUT units, will be evaluated and certified annually on all hands-on phase tasks listed in Supplement 1 of the BCT POI 21-114. The DS, assigned to AIT units, will be evaluated and certified annually on those common tasks selected for reinforcement training and evaluation in AIT, listed in TRADOC Reg 350-6. In addition, DS will be certified whenever changes are made to the BCT/AIT/OSUT POI. The IET cadre may be used to administer the certification.

2-11. Drill sergeant assignment ratios. TRADOC installations will be resourced DS requirements based on the following:

a. Basic combat training/OSUT. Twelve DS per company (3 per platoon) in order to sustain ratio within range of 1:17-20. Resourcing computations consider course length plus two weeks.

b. Advance individual training. Ratio for AIT is 1:30. Resourcing computations consider course length plus one week. Although the AIT ratio is 1:30, units/companies must maintain as a minimum two DSs per unit/company.

c. Drill Sergeant School. Staffing for DSLs will be IAW the Instructor Manpower Model.

d. Pre-Command Course/Cadre Training Course. Noncommissioned officers, who have come off DS status within one year, should be used for this requirement.

2-12. Reporting requirements. The DSP POC, at each DSP installation, must submit a monthly report to Commander, TRADOC, ATTN: ATBO-BE, 5 North Gate Road, Fort Monroe, VA 23651-1048, using TRADOC Forms 603-R (Active Army Drill Sergeant Report) and 603-1-R (Active Army Drill Sergeant Report by Grade and MOS (RCS ATBO-20 (R4)). See appendixes D and E for information on completing these forms. The ending period of the report will be the last calendar day of each month. The report must arrive at TRADOC HQ no later than (NLT) the 10th of the month, following the ending period date. Negative reports are required.

2-13. Drill Sergeant School organization.

a. All TRADOC schools approved by CG, TRADOC, teaching the approved DSSC POI, and accredited by the Drill Sergeant Program Proponent office, will be titled as a "Drill Sergeant School."

b. The DSS can be part of a Noncommissioned Officer Academy (NCOA), where authorized. Exceptions to this policy must be submitted to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315, for review and approval.

c. The chief instructor (CI) position will be filled by a first sergeant/master sergeant who is DS-qualified. When the DSS is not collocated under an NCOA, a DS-qualified individual will fill the commandant and chief instructor.

d. Female DS authorizations for DSS are shown in table 2-1. Career Management Field for female DSS will be from CMF authorized on the installation.

Table 2-1

Number of Female DS minimum authorizations for DSS

SCHOOL	AUTHORIZATION
Fort Benning	2 each
Fort Jackson	4 each
Fort Leonard Wood	4 each

2-14. Training assistance and support for RC DSS.

a. In the interest of providing continuing support to RC DSS, TRADOC CG has established an affiliation between training division DSS and specific AC DSS. These

affiliations (table 2-2) represent geographical considerations and include capstone mission where possible.

b. Specific benefits of these affiliations include:

(1) Drill sergeant leader training. The RC commandants may request a mobile training team (MTT) to assist in DSL training.

(2) Staff assistance visits. The AC DSS commandants are encouraged to visit RC DSS during their training and provide comments and recommendations to the RC commandants.

Table 2-2

AC/US Army Reserve (USAR) DS Affiliates

AC SUPPORT	RC AFFILIATE	HOME LOCATION	MOB STATION
Fort Benning	95th 9;	**9;** Oklahoma	Fort Sill
	104th	City,OK	Fort Bliss
		Vancouver, WA	
Fort Jackson	80th		Fort Gordon/FLW
	108th	Richmond,	Fort Jackson
		VACharlotte, NC	
Fort Leonard	84th		Fort Benning
Wood	98th	Milwaukee, WI	Fort Leonard Wood
	100th	Rochester, NY	Fort Knox
		Louisville, KY	

c. Send a copy of all MTT After Actions Reports that require USATC and Fort Jackson's assistance, (e.g., shortages of required equipment, personnel, etc.) to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

2-15. Drill sergeant military occupational specialty (MOS) structure. The DS MOS structure and assignment of DSs at TRADOC installations follows (not for reserve):

a. In BCT, 33 percent of DS requirements/authorizations will be from CMF 11; 17 percent will be from other combat arms (CA) MOS; 25 percent will be from combat support (CS) MOS; and 25 percent will be from combat service support (CSS) MOS. Installations that conduct BCT are authorized a minimum of two and up to four female DSs in each training company to include the Fitness Training Unit (FTU) and Reception Battalion.

b. In AIT, 100 percent of the DS requirements/authorizations will be from the CMF being trained. When the Army provides a CMF/MOS to females, installations can document their table of distribution and allowance (TDA) for female positions with any available

MOS until such time that females with the specific CMF/MOS become available for DS duty.

c. In OSUT, (CA and CS MOS's) 100 percent of the DS requirements/authorizations will be from the CMF being trained. In OSUT, (CSS MOS's) will have a DS mix of 67 percent CMF and 33 percent CA DSs, with at least 50 percent of CA mix being infantry. This further breaks down to four CA DSs and eight CMF DSs per company. That is one CA DS per platoon, two female CMF DSs per company and six non-gender specific CMF DSs per company. When the Army provides a CMF/MOS to females, installations can document their TDA female positions with any available MOS until such time that females with the specific CMF/MOS become available for DS duty.

d. Army Training Center commanders will determine the DS CMF structure within (FTUs) and reception battalions, using MOS authorized at their installation and the approved TRADOC staffing guidance for Reception Battalions/FTU.

e. Code the Personnel Identification (PERS Column "I" (interchangeable)) on the authorization document for all non-CA MOS.

TR 350-10, para 2-11.

2-11. Student dismissal. See ARs 135-175, 350-1, and 600-8-24.

Tab 35

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Standard 35 Reference Excerpts

TR 350-18, para 3-2g, Institution SOP. TASS institutions must develop and maintain a unit SOP, which includes, as a minimum, policy and procedures for:
g. Refresher and remedial training.

TR 350-6, para 2-2c(3). c. The following formal counseling requirements will be met for all IET soldiers:
(3) Counseling includes an objective evaluation of the soldier's progress, adherence to Army Values, capability to operate as a team member, and establishment of attainable goals for the next phase of training.

TR 350-6, paras 3-31j&k, Testing procedures for AIT and the MOS portion of OSUT.
The goal should remain 100 percent performance to standard on all tasks by each soldier. Soldiers who are unable to achieve this goal should be considered for remedial training and re-testing prior to graduation, or reassignment to another company in a follow-on cycle.

j. Remedial training is a joint responsibility of students and trainers. As such, students failing to achieve task/course standards must be provided opportunities to review material, and practice skills prior to undergoing retest. Trainers must provide appropriate remedial assistance as necessary.

k. Re-testing will include all tasks failed.

TR 350-6, para 3-33, Remedial training.
a. Soldiers unable to attain training standards will be provided remedial training to enable them to remain in cycle, rather than be given a new start in a follow-on cycle.

b. Soldiers who have not passed an APFT prior to graduation may be retained in the fitness training unit (FTU), or similar holding unit, for remedial training; however, they will continue to be reported as holds in ATRRS using REASON CODE "B: Physical Fitness (Remedial Tng-APFT)."

c. In keeping with the TRADOC investment strategy, a soldier will continue to receive remedial training so long as the chain-of-command determines the soldier has the mental and physical capacity to succeed.

TR 350-6, para 3-34, MOS retraining/reclassification policy.
a. The TRADOC IET retraining policy is as follows:
(1) A soldier unable to qualify for a MOS after the first training assignment may be considered for retention in the Army and qualify for additional skill training in a second MOS only if:

(a) In the judgment of the commander, the soldier possesses those qualities which are considered exceptional; and

(b) The soldier demonstrates the motivation and potential to successfully complete the second MOS training.

(2) In all other cases, soldiers who do not meet academic standards will be properly counseled and processed for separation IAW AR 635-200.

b. This policy was established to enhance efficiency, productivity, and morale in both the training base and the units to which MOSQ soldiers are ultimately assigned. It is designed to allow IET cadre to concentrate on trainable soldiers and to reduce workload associated with IET soldiers whose attitude and performance create an unwarranted administrative burden. The objective is to eliminate disruptive, less productive IET soldiers who have an adverse impact on unit esprit and the training environment.

c. Commanders should use all available assets in handling disruptive and nonproductive soldiers. Unit Ministry Team (UMT) support is provided in each IET battalion. These, along with installation law enforcement and medical personnel, are valuable assets trained to assist IET soldiers, cadre, and senior leadership in resolving problems, and should be used as appropriate.

d. Battalion commanders will determine whether soldiers who are unable to achieve MOS graduation requirements merit a second opportunity, or they should be processed for elimination from the Army. Additional guidance on retraining/reclassification procedures is provided at appendix J.

TR 350-6, para 3-39, Retraining and holding units (RHUs).

a. Basic Combat Training/One Station Unit Training installations will establish company-size RHUs to perform two functions:

(1) Process soldiers pending discharge. Retraining and holding units will process IET soldiers identified by the chain-of-command for discharge from the Army under provisions pertaining to administrative entry-level separation.

(2) Retrain selected IET soldiers. Retraining and holding units will provide special training to selected IET soldiers who have the potential to complete training with additional time/assistance.

b. Soldiers in each category will be managed and housed in separate groups.

c. All Reserve Component service members will receive counseling from the Reserve Component Liaison Office prior to assignment to the RHU.

TR 350-6, Apx J.
Appendix J
Military Occupational Specialty Retraining/Reclassification Procedures

J-1. When an IET soldier has been given all remedial training opportunities and ultimately fails the first attempt at a MOS-producing school or course, the training unit battalion commander has 2 working days to decide on the disposition of the soldier.
a. The battalion commander, based upon input received from cadre familiar with the soldier's reason for failure, can consider the soldier for a new start in another company or battalion.

b. The soldier may also be considered for retraining in another available MOS, if qualified, or the soldier may be recommended for separation.

c. When RC soldiers are not granted a second training opportunity, coordination with the installation's RC liaison NCO is required to present additional evidence on behalf of the soldier to the battalion commander. The battalion commander will consider the liaison's input before making a final decision.

J-2. IET soldiers who are offered a second training opportunity will be sent to the Personnel Service Center (PSC) with all documents relative to their reclassification. The PSC has access to the "TS" display on ATRRS, which is used to reclassify IET individuals.

a. The ATRRS operator will bring up the IET soldier's MOS selection "TS" display in ATRRS. The "TS" display is reviewed and updated to include the reason code for reclassification. This establishes the IET soldier's current qualifications and status in ATRRS. At this point a list will be printed providing MOSs the IET soldier is qualified to select.

b. Using the "RETAVAL" report available in the reports generator section of ATRRS, the ATRRS operator can enter the social security numbers for up to ten different individuals. ATRRS will print out a listing of the training available for each individual based on their qualifications and the available classes scheduled in ATRRS over the next 4 weeks. The IET soldier may use this listing to select a new MOS. If the IET soldier is qualified and a training seat is available, the MOS will be reserved. When the reservation is made, a message is provided to the PSC. This is their authority to publish orders.

c. The PSC will reclassify the IET soldier within 48 hours. To save transportation costs and reduce stress on the soldier, reasonable attempts will be made to match the soldier to a MOS that is taught at the assigned installation.

d. In the case of a RC soldier, the RC Liaison NCO will seek a MOS based on a unit vacancy. If an ARNG accession module does not contain predetermined second and third choices based on unit needs, the ARNG unit and ARNG liaison NCO at the installation will make resolution. Similar coordination will be performed for USAR personnel.

e. If ATRRS is non-operational, manual processing will not result in the forfeiture of any of the above mentioned efforts. The reclassification process should be accomplished within 5 working days.

f. In the event another training opportunity is not offered or available, the commander with separation authority will counsel the soldier and consider separation actions IAW AR 635-200, chapter 2, section II.

J-3. In all cases where reclassification involves a move from one installation or headquarters to another, each installation and reclassifier will ensure the soldier's file/packet includes a memorandum of introduction. The memorandum will verify the training battalion commander has evaluated the soldier as being satisfactory, and the reclassification decision was not the result of any "automatic" process. The soldier will also acknowledge their understanding that a second training failure will result in a non-waiverable separation from service. The memorandum will be signed by the training battalion commander or authorized representative.

J-4. Installation commanders will establish a central POC who has, or is delegated, staff authority for matters pertaining to IET retraining. These POCs will be identified to Commander, TRADOC, ATTN: ATOM-O, 11 Bernard Road, Fort Monroe, VA 23651-1001, by name, office symbol, and telephone extension. Questions or comments pertaining to this policy will be addressed to the above office.

Tab 36

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Standard 36 Reference Excerpts

AR 25-400-2, Table 3-1.

Table 3–1
Questions to aid the IM and FP in establishing recordkeeping requirements

Issue	Questions	Action
Purpose	Will the information support the mission of the FP? Are there multiple purposes and, if so, will there be varying retention requirements?	Identify the prescribing directive(s) the information will support. Relate the prescribing directive(s) to the MARKS number at http://www.rmda.belvoir.army.mil/markstit.htm and on the Army Electronic Library CD–ROM (EM 0001).
Vital records	Is the information in the system a vital record?	Ensure the system has mobility, effectiveness, survivability, continuity of operations and ensure the system capacity during peace, mobilization, and war is identified and documented.
Inputs	What inputs are needed and how long should they be retained? Are they needed for legal or audit purposes?	Ensure that the description under the associated MARKS number includes this input material and that the retention period is consistent with stated legal, audit, or operational requirements of the AIS. Input records have particular audit value which must be determined by the FP. Generally, input records are categorized as feeder reports for versions, cycles, or other time or event dispositions.
On-line retention	How long does the information need to be kept on line? Are on-line retention requirements shown on the unit records or data sets?	Ensure that the proposed retention period is reasonable and consistent with the stated functional or administrative value of the AIS. The assigned retention should reflect a time or event disposition. On-line electronically stored information is directly accessible for immediate processing.
Off-line retention	If the function no longer needs the information on-line, does it need to be retained off-line? For how long?	Based on a defined time or event or combination of both, the record will become inactive and the disposition must state whether the information will be retained permanently or be deleted after a specific length of time.
System design integration	Can requirements for retention and disposition of information be integrated with systems design and operations; for example, with update procedures, regular backup operations, creation of history files, subset files, and public use data sets?	Ensure that this requirement is included in the database specification as part of the applications software capability.
Outputs	What will happen to all the information (reports, tables, charts, graphic displays, catalogs, or correspondence) generated by the sytem?	Ensure that the output products are identified in the appropriate MARKS number, if not, the IM will assist the FP, as required, in identifying this requirement to HQ RMDA, ATTN: TAPC–PDD–R.
Information integrity	Are multiple copies of the information needed? Do all media need to be maintained for the same length of time? What will happen to the different media, and when? How will the integrity and authority of the information be assured?	Ensure that the disposition under the appropriate MARKS number identifies and distinguishes the action and information locations and specifies a deletion, transfer, or retirement period consistent with the functional or administrative value of the record.
Privacy Act	Is the system subject to the provisions of the Privacy Act? Is the system subject to inter-agency sharing under the provisions of the DODD 5400.11–R?	If yes, ensure the appropriate MARKS number reflects a Privacy Act System notice number. If a notice number is not indicated, or, the information is not included in the system notice, the IM will assist the FP in developing or altering an existing system notice according to AR 340–21. If yes, the IM will initiate coordination with the Privacy Act official to ensure the sharing is included in the routine use of the system notice. If the sharing is not identified, the IM will assist the FP in developing an altered system notice.
Documentation	Who is responsible for maintaining up-to-date authoritative documentation of the system and the information in an emergency situation?	Types of required managerial and technical documentation are identified in AR 25–3. Responsibility for preparation of each document type is identified early in the project life cycle. Some document types are the responsibility of the development group; others, the user group; and still others are prepared jointly. While both groups may work together on some document types, one the groups should be identifed as having primary responsiblity.

Table 3–1
Questions to aid the IM and FP in establishing recordkeeping requirements—Continued

Issue	Questions	Action
	Where will the documentation be maintained?	Documentation will be maintained with the AIS throughout its life cycle. Disposition will be the same as the AIS located at http://www.rmda.belvoir.army.mil/markstit.htm and on the Army Electronic Library CD–ROM (EM 0001). Managerial and technical documentation not identified at http://www.rmda.belvoir.army.mil/markstit.htm and on the Army Electronic Library CD–ROM (EM 0001) will be brought to the attention of the FP for further processing.
Long-term storage	Which media containing the record must be preserved for long-term operational needs or for archival purposes?	Some electronic records may be integrated with records of other media during their active stage. When the information becomes inactive or the project is terminated, conversion to a single media; for example, all paper or all electronic, may be feasible. See paragraph 3–11 for additional guidance.

TR 350-6, para 3-7, Training records.
a. A DA Form 5286-R (Individual Training Record (ITR)) will be initiated and maintained by the soldier's assigned company for every soldier attending IET. The modified DA Form 5286-R, available in the Automated Instructional Management System-Personal Computer (AIMS-PC) database, will be used to document the completion of training requirements in all IET courses. This modified form streamlines the information required and provides a standardized reporting format for all IET sites. Additional guidance and a sample modified DA Form 5286-R is at appendix G.

b. Noncommissioned officers attending MOS producing courses in order to reclassify into another MOS, or prior-service personnel in the grade of E5 or higher enlisting IAW paragraph 2-17, will receive a DA Form 1059 (Service School Academic Evaluation Report) upon completion of their course, regardless of course length.

TR 350-6, Apx G.
Training records
G-1. Training records provide gaining unit commanders with an official record of the soldier's completed training, and serve as objective departure points for unit training. The IET soldier's training records packet will contain the following:

a. A DA Form 5286-R (Individual Training Record (ITR)) will be initiated and maintained by the soldier's assigned company for every soldier attending IET. *The modified DA Form 5286-R in the AIMS-PC database will be used to document the completion of training requirements in all IET. This form streamlines the information required and provides a standardized reporting format for all IET sites. A sample modified DA Form 5286-R is at figure G-1.*

b. Enlisted personnel attending MOS producing courses in order to reclassify or reenlist into another MOS, or prior service personnel enlisting IAW paragraph 2-17, will receive

a DA Form 1059 (Service School Academic Evaluation Report) upon completion of their course, regardless of course length.

c. A DA Form 705 (Army Physical Fitness Test Scorecard) will be included in the training records packet.

G-2. Installations must ensure that out-processing is IAW AR 612-201. Losing units will ensure completed training forms are given to each soldier to hand-carry to their next training site or first unit of assignment using DA Form 5287, Training Record Transmittal Jacket. Active Component soldiers will not depart IET without training records. Commanders must instill in their soldiers the importance of safely hand-carrying these records to their next duty station. In accordance with AR 635-200, RC soldiers' training records will be sent to the appropriate TSAG's Office or supporting USAR Command upon completion of training.

G-3. Due to the increasing problem of identity theft, commanders must ensure that critical personal identification information is not included on the outside of the records packet envelope. Packets need to be marked in order to identify the content's owner, but complete names and social security numbers should not be placed on the outside of the envelope. Development of proper records identification systems will be at the commander's discretion.

TR 350-18, para 3-12, Attendance register.
a. Purpose: To track attendance for pay and education/training.

b. ATRRS class roster and attendance record (TRADOC Form 270-R, located at the end of this regulation) will be prepared and maintained for each training site. Under no circumstances will students be permitted to complete/sign out before the end of the day for which the register is maintained.

c. Distribution:
(1) Original to TASS battalion headquarters.
(2) Copy for instructor's records.
(3) Copy in the visitor folder in each classroom.
(4) Copy for individual's unit of assignment.

d. For annual training, the ATRRS class roster will be used in lieu of TRADOC Form 270-R.

TR 350-18, para 3-13, Maintenance of training support records. Training support records will be maintained at each school code site, as required by the proponent school.

TR 350-18, para 3-28, Student academic records.

a. The TASS battalion commander is responsible for ensuring all student input/output data is posted to ATRRS within 10 working days of course start date and completion date.

b. The TASS battalion will maintain individual records for each student for 12 months, containing the following documents:

(1) The enrollment application (AATAS or DA Form 4187 for IDT).

(2) The attachment order, if prepared.

(3) A copy of the pre-execution checklist with appropriate signatures.

(4) All student leadership evaluations.

(5) All test scores.

(6) All counselings, to include initial, performance, leadership, end of course evaluations, and individual developmental action plans.

(7) Copy of course completion, DA Form 1059.

(8) Any other correspondence referencing the soldier, i.e., drop packet.

(9) DA Form 705 (maintained for professional development courses, and selected functional courses).

(10) DA Form 3349 with MMRB results (if applicable).

c. After the 12-month record retention period, the DA Form 1059 will be removed from the individual records and kept on file, IAW AR 25-400-2. Supporting documentation is destroyed.

e. Records for disenrolled students must be maintained for two years IAW AR 25-400-2/TRADOC Reg 351-10.

TR 350-16, para 7-3, Training.

a. The DSL candidate's training will be one complete drill sergeant class. Therefore, the DSS commandant will place the qualified (outgoing) DSL with the DSL candidates, so as to monitor their progress through the program.

b. The DSL certification training will include the following:

(1) An overview of the DSSC POI. The DSL candidates should understand the methodology outlined in the DSSC POI (i.e., counseling, grading standards and procedures, and the small group instruction concept). The CI will counsel the prospective DSL on the overview of the POI.

(2) Evaluation of all performance and written examinations outlined in the DSSC POI for completion by DSL candidates. The senior DSL will conduct these evaluations. DSL candidates must receive a "GO" on all performance examinations. The performance examinations are D04-02, D04-03, E05-03, E05-07, E05-14, F06-02 part II, F06-04, F06-06, F06-08, F06-12, F06-14, F06-18, F06-20, F06-22, G07-07, I09-05,[per Ch1] and I09-11. [Delete per Ch1] and all master fitness performance exams. The DSL candidate must receive at least a 70% on all written exams. The written exams

are B02-08, C03-05, F06-02 part I, F06-10, F06-16, and J10-08. A "NO-GO" will result in the DSL candidate being returned to their unit.

(3) Evaluation in drill and ceremony testing/grading procedures:

(a) The DSL candidate will first observe the testing procedures of their mentor.

(b) The DSL candidate will then simultaneously evaluate a DS candidate with the mentor as the primary grader.

(c) They will conduct three evaluations: talk-thru, by-the-numbers, and step-by-step.

(d) The DSL (mentor) will conduct performance counseling of the DS candidate. The DSL (mentor) will also conduct appropriate counseling of the DSL candidate's grading procedures. Drill sergeant leader candidate (DSLC) will be used as a primary instructor after counseling has been conducted for that MOI.

(4) Evaluation of methods of instruction and the instruction in small group concept. The DSL candidate must complete certification prior to being used as a primary instructor, however, DSLC will be used to present drill and ceremony modules and demonstrations. The CI with all available DSL forming the class will evaluate the DSLC presentation ability on blocks of instruction on Human Relations, Drill Sergeant Leadership, Counseling, Fitness Training (D04-01), and Weapons Training. The CI will select the block of instruction the DSLC will present, providing ample time to prepare for the instruction. All evaluations will be documented by the CI on TRADOC Form 369-R (DSS Cadre Evaluation Sheet) [page 1 and page 2]. Once a DSLC receive a "GO" rating on TRADOC Form 369-R the DSLC may be used as an instructor for that series of instruction. At no time will a DSLC be left in a class instructing without a certified DSL.

(5) Attendance and graduation from the installation Equal Opportunity Representative Course.

c. Chief Instructors or DSL who served as certified DSL will be required to attend an informal sit-in with a DS class on all subjects listed below, and within 24-36 months, pass the APFT with a score of 240 (80 in each event). Chief Instructors (CI) who have never been a certified DSL will be required to complete all requirements of the DSL certification program in paragraph 7-3b, above. The outgoing CI or the DSS commandant will mentor the CI. CI or DSL returning within 24-36 months must be evaluated on the following: one drill and ceremony presentation, APFT (80 per event), and one small group instruction on one of the following:

- *physical training (PT)*
- *basic rifle marksmanship (BRM)*
- *Phase Test*
- *G07-03*

d. The commandant is responsible for:

(1) Ensuring each DSL is qualified and meets the requirement criteria as outlined in this paragraph and paragraph 7-2.

(2) Tracking each DSL's progress beyond the certification program. A progress plotter will be maintained in the DSL's packet.

(3) Requesting DSL candidates certification certificate of training. The commandant will submit a memorandum, with name, rank, social security number (SSN), and start/finish dates of the certification training, to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

(4) Having each DSL evaluated on their classroom small group instruction and techniques a minimum of one per class for AC schools and once each six-month period for RC schools using TRADOC Form 369-R. Place a copy of the evaluation in DSL's files. The chief instructor and platoon sergeant will assist in performing these evaluations (for RC IDT periods the senior DSL may perform these evaluations).

e. Documentation of DSL certification. Each DSS will maintain a file on each DSL to include the following:

(1) Left side:

(a) DSL certificates, EOR and MFT certificates or request memorandums.

(b) DA Form 705 (within 60 days after reporting to the school, DA Form 5500-R, or DA Form 5501-R, if applicable).

(c) Phase counseling (Phase I, II, III, and NO-GO counseling as applicable).

(d) Initial counseling (Commandant (Comdt), CI, senior drill sergeant leader (SDSL)).

(e) Letter of acceptance (from Comdt).

(f) DA Forms 2A/ERB and 2-1.

(2) Right side:

(a) Post certification progress plotter.

(b) TRADOC Form 369-R (post certification).

(c) Certification progress plotter, (Candidate Record of Training).

(d) TRADOC Form 369-R annexes A, B, C, D, E (signed by CI).

(e) Evaluation in testing/grading procedures, talk-thru, step-by-step, by-the-numbers (recorded on DA Form 4856-R).

(f) Performance exams (within test control standards) from certification.

TR 350-10, para 2-8.

2-8. Student records.

a. The SGL or instructor will create a file for each student containing—

(1) Leadership position evaluations.

(2) Counseling records.

(3) Copy of DA Form 705 (for PLDC, and ANCOC/BNCOC Phase I only).

(4) Test/exam scores. (*Do not file copies of test/exam answer sheets in student records.*)

(5) DA Form 1059.

(6) Copy of student's course attendance pre-execution checklist

(7) Copy of any waivers soldier needed to attend course, signed by first general officer in his/her chain of command.

(8) Other student performance evaluation records and supporting documentation listed in TRADOC Reg 350-18, paragraph 3-28.

b. Commandants will maintain student academic records per AR 25-400-2 (File Number: 351-1f, leaders course evaluations). As an exception for accreditation standards validation, student academic records will be maintained for a minimum of 12 months after course graduation date/phase completion date at the school code location.

c. Test control officers will separately retain test answer sheets and associated student papers until course completion, at which time they will be destroyed. Test answer sheets of non-graduates and early releases will be retained/secured separately from the graduate student attendance records files for 24 months before destruction.

TR 350-10, para 5-4j(3)(b).

5-4. Basic Noncommissioned Officer Course (BNCOC). The BNCOC provides soldiers selected for promotion to staff sergeant an opportunity to acquire the leader, technical, tactical, VASA and knowledge needed to lead squad-size units. Training builds on experience gained in previous training and operational assignments. Branch schools and selected TASS school battalions conduct this course. Graduates of BNCOC are recognized by MEL code V. Training focuses on—

a. Preparing unit and subordinate elements for peace and wartime missions and contingencies.

b. Planning, supervising, and executing tasks and missions assigned to squad-size units.

c. Leading, supervising, disciplining, training, and developing subordinates.

d. Planning, scheduling, supervising, executing, and assessing the unit's mission-essential training.

e. Planning, initiating, and supervising personnel, administration, and supply actions.

f. Planning, supervising, and assessing the safe use, maintenance, security, storage, and accountability of personal and organizational equipment and material.

g. Caring for subordinates and their families.

h. Active Component soldiers will be scheduled in ATRRS to attend BNCOC Phase I common core and MOS technical training sequentially within the same fiscal year. Active Component soldiers may attend Phase I common core at full resident NCOAs, via video teletraining (VTT), or at the nearest TASS training site.

i. The first general officer in the AC soldier's chain of command may grant a waiver extension of up to 6 months or until the next Phase II technical MOS course start date, whichever occurs first.

j. Reserve Component BNCOC common core training requires formal school attendance one weekend per month for 6 consecutive months or 2 weeks AT/ADT. Soldiers must begin branch-technical training within 24 months of completing common core training. Request for waiver to the 24-month requirement will be forwarded through command channels for approval by the first general officer in the soldier's chain of command as follows:

(1) An additional 12 months may be granted for cogent reasons by the first general officer in the soldier's chain of command. However, soldiers must begin BNCOC branch-technical training within 36 months of completing common core Phase I training. Soldiers will report to school with a copy of the approved waiver and the DA Form 1059 indicating successful completion of Phase I.

(2) An additional 12 months (added to the 36 months) may also be granted by the first general officer in the chain of command for a reclassification training requirement incurred following completion of common core training (soldier must start branch-technical training within 48 months of completing common core training). Soldiers will report to school with a copy of the approved waiver and both common core and MOS reclassification training DA Forms 1059.

(3) Any AC/RC soldier that exceeds their maximum waiverable NCOES time line attendance windows, as applicable in paragraphs 5-4 or 5-5, must submit an exception to policy through the first general officer in the soldier's chain of command, to Commander, TRADOC, ATTN: ATTG-I. This request packet must include the following:

(a) Memorandum requesting exception to policy.

(b) Army Training Requirements and Resource System printout showing soldier's course attendance record and available course start dates.

(c) Any documentation that supports the soldier's claim for the exception requested.

(d) DA Form 1059 for completion of Phase I training.

(e) Name, e-mail address, phone and FAX numbers of soldier's unit POC.

Tab 37

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Standard 37 Reference Excerpts

TR 350-6, para 3-7, Training records.

a. A DA Form 5286-R (Individual Training Record (ITR)) will be initiated and maintained by the soldier's assigned company for every soldier attending IET. The modified DA Form 5286-R, available in the Automated Instructional Management System-Personal Computer (AIMS-PC) database, will be used to document the completion of training requirements in all IET courses. This modified form streamlines the information required and provides a standardized reporting format for all IET sites. Additional guidance and a sample modified DA Form 5286-R is at appendix G.

b. Noncommissioned officers attending MOS producing courses in order to reclassify into another MOS, or prior-service personnel in the grade of E5 or higher enlisting IAW paragraph 2-17, will receive a DA Form 1059 (Service School Academic Evaluation Report) upon completion of their course, regardless of course length.

TR 350-6, Apx G.
Training records

G-1. Training records provide gaining unit commanders with an official record of the soldier's completed training, and serve as objective departure points for unit training. The IET soldier's training records packet will contain the following:

a. A DA Form 5286-R (Individual Training Record (ITR)) will be initiated and maintained by the soldier's assigned company for every soldier attending IET. The modified DA Form 5286-R in the AIMS-PC database will be used to document the completion of training requirements in all IET. This form streamlines the information required and provides a standardized reporting format for all IET sites. A sample modified DA Form 5286-R is at figure G-1.

b. Enlisted personnel attending MOS producing courses in order to reclassify or reenlist into another MOS, or prior service personnel enlisting IAW paragraph 2-17, will receive a DA Form 1059 (Service School Academic Evaluation Report) upon completion of their course, regardless of course length.

c. A DA Form 705 (Army Physical Fitness Test Scorecard) will be included in the training records packet.

G-2. Installations must ensure that out-processing is IAW AR 612-201. Losing units will ensure completed training forms are given to each soldier to hand-carry to their next training site or first unit of assignment using DA Form 5287, Training Record Transmittal Jacket. Active Component soldiers will not depart IET without training records. Commanders must instill in their soldiers the importance of safely hand-carrying these records to their next duty station. In accordance with AR 635-200, RC soldiers' training records will be sent to the appropriate TSAG's Office or supporting USAR Command upon completion of training.

G-3. Due to the increasing problem of identity theft, commanders must ensure that critical personal identification information is not included on the outside of the records packet envelope. Packets need to be marked in order to identify the content's owner, but complete names and social security numbers should not be placed on the outside of the envelope. Development of proper records identification systems will be at the commander's discretion.

TR 350-10, para 2-8.

2-8. Student records.

a. The SGL or instructor will create a file for each student containing—

(1) Leadership position evaluations.

(2) Counseling records.

(3) Copy of DA Form 705 (for PLDC, and ANCOC/BNCOC Phase I only).

(4) Test/exam scores. (*Do not file copies of test/exam answer sheets in student records.*)

(5) DA Form 1059.

(6) Copy of student's course attendance pre-execution checklist

(7) Copy of any waivers soldier needed to attend course, signed by first general officer in his/her chain of command.

(8) Other student performance evaluation records and supporting documentation listed in TRADOC Reg 350-18, paragraph 3-28.

b. Commandants will maintain student academic records per AR 25-400-2 (File Number: 351-1f, leaders course evaluations). As an exception for accreditation standards validation, student academic records will be maintained for a minimum of 12 months after course graduation date/phase completion date at the school code location.

c. Test control officers will separately retain test answer sheets and associated student papers until course completion, at which time they will be destroyed. Test answer sheets of non-graduates and early releases will be retained/secured separately from the graduate student attendance records files for 24 months before destruction.

TR 350-18, para 3-12, Attendance register.
a. Purpose: To track attendance for pay and education/training.

b. ATRRS class roster and attendance record (TRADOC Form 270-R, located at the end of this regulation) will be prepared and maintained for each training site. Under no circumstances will students be permitted to complete/sign out before the end of the day for which the register is maintained.

c. Distribution:
(1) Original to TASS battalion headquarters.
(2) Copy for instructor's records.
(3) Copy in the visitor folder in each classroom.
(4) Copy for individual's unit of assignment.

d. For annual training, the ATRRS class roster will be used in lieu of TRADOC Form 270-R.

TR 350-18, para 3-13, Maintenance of training support records. Training support records will be maintained at each school code site, as required by the proponent school.

TR 350-18, para 3-28, Student academic records.
a. The TASS battalion commander is responsible for ensuring all student input/output data is posted to ATRRS within 10 working days of course start date and completion date.

b. The TASS battalion will maintain individual records for each student for 12 months, containing the following documents:
(1) The enrollment application (AATAS or DA Form 4187 for IDT).
(2) The attachment order, if prepared.
(3) A copy of the pre-execution checklist with appropriate signatures.
(4) All student leadership evaluations.
(5) All test scores.
(6) All counselings, to include initial, performance, leadership, end of course evaluations, and individual developmental action plans.
(7) Copy of course completion, DA Form 1059.
(8) Any other correspondence referencing the soldier, i.e., drop packet.
(9) DA Form 705 (maintained for professional development courses, and selected functional courses).
(10) DA Form 3349 with MMRB results (if applicable).

c. After the 12-month record retention period, the DA Form 1059 will be removed from the individual records and kept on file, IAW AR 25-400-2. Supporting documentation is destroyed.

d. The TASS battalion may prepare a certificate of training for each student (except AMEDDC&S/OCS courses) upon successful completion of all phase requirements. The certificate of training will include the student's name, course title and phase, and completion date.

e. Records for disenrolled students must be maintained for two years IAW AR 25-400-2/TRADOC Reg 351-10.

TR 350-16, para 7-3, Training.
a. The DSL candidate's training will be one complete drill sergeant class. Therefore, the DSS commandant will place the qualified (outgoing) DSL with the DSL candidates, so as to monitor their progress through the program.

b. The DSL certification training will include the following:

(1) An overview of the DSSC POI. The DSL candidates should understand the methodology outlined in the DSSC POI (i.e., counseling, grading standards and procedures, and the small group instruction concept). The CI will counsel the prospective DSL on the overview of the POI.

(2) Evaluation of all performance and written examinations outlined in the DSSC POI for completion by DSL candidates. The senior DSL will conduct these evaluations. DSL candidates must receive a "GO" on all performance examinations. The performance examinations are D04-02, D04-03, E05-03, E05-07, E05-14, F06-02 part II, F06-04, F06-06, F06-08, F06-12, F06-14, F06-18, F06-20, F06-22, G07-07, I09-05,[per Ch1] and I09-11. [Delete per Ch1] and all master fitness performance exams. The DSL candidate must receive at least a 70% on all written exams. The written exams are B02-08, C03-05, F06-02 part I, F06-10, F06-16, and J10-08. A "NO-GO" will result in the DSL candidate being returned to their unit.

(3) Evaluation in drill and ceremony testing/grading procedures:

(a) The DSL candidate will first observe the testing procedures of their mentor.

(b) The DSL candidate will then simultaneously evaluate a DS candidate with the mentor as the primary grader.

(c) They will conduct three evaluations: talk-thru, by-the-numbers, and step-by-step.

(d) The DSL (mentor) will conduct performance counseling of the DS candidate. The DSL (mentor) will also conduct appropriate counseling of the DSL candidate's grading procedures. Drill sergeant leader candidate (DSLC) will be used as a primary instructor after counseling has been conducted for that MOI.

(4) Evaluation of methods of instruction and the instruction in small group concept. The DSL candidate must complete certification prior to being used as a primary instructor, however, DSLC will be used to present drill and ceremony modules and demonstrations. The CI with all available DSL forming the class will evaluate the DSLC presentation ability on blocks of instruction on Human Relations, Drill Sergeant Leadership, Counseling, Fitness Training (D04-01), and Weapons Training. The CI will select the block of instruction the DSLC will present, providing ample time to prepare for

the instruction. All evaluations will be documented by the CI on TRADOC Form 369-R (DSS Cadre Evaluation Sheet) [page 1 and page 2]. Once a DSLC receive a "GO" rating on TRADOC Form 369-R the DSLC may be used as an instructor for that series of instruction. At no time will a DSLC be left in a class instructing without a certified DSL.

(5) Attendance and graduation from the installation Equal Opportunity Representative Course.

c. Chief Instructors or DSL who served as certified DSL will be required to attend an informal sit-in with a DS class on all subjects listed below, and within 24-36 months, pass the APFT with a score of 240 (80 in each event). Chief Instructors (CI) who have never been a certified DSL will be required to complete all requirements of the DSL certification program in paragraph 7-3b, above. The outgoing CI or the DSS commandant will mentor the CI. CI or DSL returning within 24-36 months must be evaluated on the following: one drill and ceremony presentation, APFT (80 per event), and one small group instruction on one of the following:

- physical training (PT)
- basic rifle marksmanship (BRM)
- Phase Test
- G07-03

d. The commandant is responsible for:

(1) Ensuring each DSL is qualified and meets the requirement criteria as outlined in this paragraph and paragraph 7-2.

(2) Tracking each DSL's progress beyond the certification program. A progress plotter will be maintained in the DSL's packet.

(3) Requesting DSL candidates certification certificate of training. The commandant will submit a memorandum, with name, rank, social security number (SSN), and start/finish dates of the certification training, to Commander, USATC and Fort Jackson, ATTN: ATZJ-PTM-DSPP, 2179 Sumter Street, Fort Jackson, SC 29207-5315.

(4) Having each DSL evaluated on their classroom small group instruction and techniques a minimum of one per class for AC schools and once each six-month period for RC schools using TRADOC Form 369-R. Place a copy of the evaluation in DSL's files. The chief instructor and platoon sergeant will assist in performing these evaluations (for RC IDT periods the senior DSL may perform these evaluations).

e. Documentation of DSL certification. Each DSS will maintain a file on each DSL to include the following:

(1) Left side:

(a) DSL certificates, EOR and MFT certificates or request memorandums.

(b) DA Form 705 (within 60 days after reporting to the school, DA Form 5500-R, or DA Form 5501-R, if applicable).

(c) Phase counseling (Phase I, II, III, and NO-GO counseling as applicable).

(d) Initial counseling (Commandant (Comdt), CI, senior drill sergeant leader (SDSL)).

(e) Letter of acceptance (from Comdt).
(f) DA Forms 2A/ERB and 2-1.
(2) Right side:
(a) Post certification progress plotter.
(b) TRADOC Form 369-R (post certification).
(c) Certification progress plotter, (Candidate Record of Training).
(d) TRADOC Form 369-R annexes A, B, C, D, E (signed by CI).
(e) Evaluation in testing/grading procedures, talk-thru, step-by-step, by-the-numbers (recorded on DA Form 4856-R).
(f) Performance exams (within test control standards) from certification.

Tab 38

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Standard 38 Reference Excerpts

AR 350-41, para 9-8(15), Physical fitness testing procedures.
(15) Individuals will be weighed when they take record Army Physical Fitness Tests or at least every 6 months according to AR 600-9.
TR 350-6 para 3-13. Body composition standards in IET.

a. Accessions standards for body composition, as stated in AR 40-501 and message, DAPE-MPA, 211255Z SEP 95, Subject: Height, Weight and Body Fat Standards: Accession Versus Retention, apply during the first 6 months of the IET soldier's active duty service. The standards of AR 600-9 are applicable after the initial 6-month period.

b. Reserve component soldiers enrolled in the split-training option must meet accession body composition standards for the successive period of active duty training.

c. Initial entry soldiers will be measured and weighed within 7 days prior to graduation from AIT/OSUT. This information will be entered on the soldier's DA Form 5286-R.

d. Soldiers who exceed 6 months active service and fail to meet the body composition standards IAW AR 600-9 will be enrolled in the Army Body Composition Program and flagged. These soldiers will be shipped to the gaining unit and the documentation, to include the flag (transferable), will be forwarded to the gaining unit.

e. Prior service soldiers are required to meet the body composition standards of AR 600-9 upon reentry on active duty.

f. Reclassified soldiers (those soldiers currently holding a MOS) must meet the requirements of AR 600-9.
(1) Reclassified soldiers with temporary profiles, which prevent completion of the APFT, will not be enrolled in MOS producing courses.
(2) Soldiers in temporary duty (TDY) and return status will not be allowed to attend MOS producing courses if they do not meet the body composition standards as prescribed in AR 600-9. Soldiers not meeting standards will be returned to their home station.
(3) Soldiers in TDY enroute or PCS will not be allowed to attend MOS producing courses if they do not meet the prescribed body composition standards as prescribed in AR 600-9. These soldiers will be attached to the installation pending clarification of assignment instructions for follow-on training. The school commandant will notify U.S. Total Army Personnel Command (PERSCOM) of the soldier's ineligibility for schooling and request clarification of assignment instructions.

AR 351-1, para 1-13a, Physical fitness and weight standard.
Soldiers attending professional development courses must meet physical fitness and weight standards outlined in AR 350-41 and AR 600-9. Soldiers over 40 will be administered medical screening at local installations.

AR 351-1, para 5-32, Physical fitness and weight standard.
Soldiers attending NCOES courses must meet the physical fitness and weight standards outlined in AR 350-41 and AR 600-9. Soldiers over 40 must be medically screened before attending an NCOES course and must hand carry the completed medical screen report to the NCOA. Actions to be taken in the event a soldier reports to an NCOES course overweight are covered in paragraph 5-30b.

AR 600-9, para 20a. Commanders and supervisors will monitor all members of their command (officers, warrant officers, and enlisted personnel) to insure that they maintain proper weight, body composition (as explained in the glossary), and personal appearance. At minimum, personnel will be weighted when they take the Army Physical Fitness Test (APFT) or at least every 6 months. Personnel exceeding the screening table weight (shown in table 1) or identified by the commander or supervisor for a special evaluation will have a determination made of percent body fat. Identification and counseling of overweight personnel are required.

AR 600-9, para 20c, (Interim Change 1).
Maximum allowable percent body fat standards are as follows:
AGE GROUP: 17-20/ Male (% body fat): 20 Female (% body fat): 30
AGE GROUP: 21-27/ Male (% body fat): 22 Female (% body fat): 32
AGE GROUP: 28-39/ Male (% body fat): 24 Female (% body fat): 34
AGE GROUP: 40+/ Male (% body fat): 26 Female (% body fat): 36
However, all personnel are encouraged to achieve the more stringent Department Of Defense (DOD) wide goal, which is 20 percent body fat for males and 26 percent body fat for females.

AR 600-9, para 20d, (Interim Change 1). Personnel who are overweight (as explained in the Glossary) (including soldiers who become pregnant while on the weight control program):
1. Are nonpromotable (to the extent such nonpromotion is permitted by law).

2. Will not be assigned to command positions.

3. Are not authorized to attend professional military schooling. All soldiers scheduled for attendance at professional military schooling will be screened prior to departing their home station/losing command. Their height and weight will be recorded on their TDY orders (DD Form 1610, block 16) or on their PCS packet. Soldiers exceeding the screening table weight in table will not be allowed to depart their command until the commander has determined they meet body fat composition standards.

4. Personnel arriving at any DA board select school or those who PCS to a professional military school, who do not meet body composition standards will be processed for disenrollment and if applicable, removal from the DA board select list as follows:

a. The soldier will be notified in writing of the proposed action, the basis for the proposed action, and the consequences of denied enrollment and removal from the selection list.

b. The soldier will be afforded an opportunity to submit matters in rebuttal and a reasonable period of time (not to exceed 5 working days) in which to submit such matters.

c. The approval authority is the soldier's general court-martial convening authority, who will take prompt action consistent with the best interests of the Army after review of all matters submitted. The approval authority must approve enrollment denial and removal from the DA board select list if he finds that, in light of all the facts and circumstances, the soldier's failure to meet body fat standards was the result of a lack of that level of self-discipline expected of a soldier of similar rank and experience.

5. Personnel arriving at professional military schools (other Than DA board select or PCS schools) who do not meet body fat composition standards will be denied enrollment without further process and reassigned IAW paragraph (6) of the Interim Change dated 4 March 1994.

6. When enrollment has been denied IAW paragraph (4) or (5) above, the following policy applies:

a. For active component soldiers denied enrollment:

1. TDY and return. Soldiers will be immediately returned to home station.

2. TDY en route. Soldiers will be attached to the installation pending clarification of assignment instructions for follow-on assignment. The school commandant will notify PERSCOM of the soldier's ineligibility for schooling and request clarification of assignment instructions.

3. PCS. Policy in paragraph 20d(4) is followed. If enrollment is denied; soldiers will be reported immediately as available for assignment and attached to the installation pending assignment instructions from PERSCOM.

b. For the active Army National Guard soldiers denied enrollment:

1. TDY and return. All M-Day, title 32 AGR and title 10 AGR ARNG soldiers will return to home station. For M-Day and title 32 AGR soldiers, the school commandant will forward the memorandum to the Adjutant General of the State concerned. For title 10 AGR soldiers, the school commandant will forward the memorandum to Chief, National guard Bureau, ATTN: NGB-ARZ.

2. TDY en route. Title 32 AGR soldiers will be returned immediately to home station. The memorandum from the school commandant will be forwarded to the Adjutant General of the State concerned. ARNG title 10 soldiers will be sent to their next permanent duty station. The memorandum will be forwarded to Chief, National Guard Bureau, ATTN: NGB-ARZ.

3. PCS. Policy in paragraph 20d(4) is followed. Title 32 soldiers will be returned immediately to home station. ARNG title 10 personnel will be attached to the Office of the Senior ARNG Advisor at the installation pending receipt of permanent assignment instructions from NGB-ARP-CT.

c. U.S. Army Reserve soldiers denied enrollment:

1. TDY and return. All soldiers will return to home station. For USAR title 10 AGR soldiers, forward the memorandum to Commander, ARPERCEN (DARP-AR). For non-AGR soldiers, forward the memorandum to the first general officer the soldier's chain of command.

2. TDY en route. USAR title 10 AGR soldiers will be sent to their permanent duty station. The memorandum will forwarded to Commander, ARPERCEN (DARP-AR). The school commandant will immediately notify the gaining installation.

3. PCS. Policy in paragraph 20d(4) is followed. The school commandant will immediately report the soldier to Commander, ARPERCEN (DARP-AR) as available for assignment. Pending clarification of further instructions, attach the soldier to the Office of the Senior USAR Advisor at the installation.

7. If the schooling for which enrollment has been denied is the result of local selection, the installation commander determine the soldier's eligibility for subsequent attendance the school.

8. If the schooling for which enrollment has been denied is the result of normal career assignment, the soldier is eligible for subsequent attendance at the school providing he/she meets the standards defined in paragraph 20c.

9. Soldiers reporting to a school as a result of a reenlistment option and found not to meet body composition standards will be reassigned IAW the needs of the Army (for active duty soldiers), or returned to home station as indicated above (for ARNG/USAR soldiers). No grounds will exist for the soldier to claim an unfulfilled reenlistment contract.

10. A memorandum will be sent to the first general officer in the sending/losing chain of command that addresses the soldier's failure to maintain standards and the possible failure of the unit commander to identify and enroll the soldier in the weight control program. In addition, for soldiers in a TDY en route or PCS status, the school commandant will notify the gaining installation commander that the soldier reported to the school not meeting body composition standards. The receiving unit commander will screen the soldier upon arrival and enroll the soldier in the weight control program if the body composition standards is not meet.

11. All enrollment denials and approved removal actions must be reported electronically to CDR, PERSCOM, 2461 Eisenhower Ave, ALEX VA 22331-0400. The following information will be forwared:

a. Name
b. Social security number

c. Date of denial and/or removal
d. Brief synopsis of reasons for removal

TR 350-18, para 3-28.

3-28. Student academic records.

a. The TASS battalion commander is responsible for ensuring all student input/output data is posted to ATRRS within 10 working days of course start date and completion date.

b. The TASS battalion will maintain individual records for each student for 12 months, containing the following documents:

(1) The enrollment application (AATAS or DA Form 4187 for IDT).

(2) The attachment order, if prepared.

(3) A copy of the pre-execution checklist with appropriate signatures.

(4) All student leadership evaluations.

(5) All test scores.

(6) All counselings, to include initial, performance, leadership, end of course evaluations, and individual developmental action plans.

(7) Copy of course completion, DA Form 1059.

(8) Any other correspondence referencing the soldier, i.e., drop packet.

(9) DA Form 705 (maintained for professional development courses, and selected functional courses).

(10) DA Form 3349 with MMRB results (if applicable).

c. After the 12-month record retention period, the DA Form 1059 will be removed from the individual records and kept on file, IAW AR 25-400-2. Supporting documentation is destroyed.

d. The TASS battalion may prepare a certificate of training for each student (except AMEDDC&S/OCS courses) upon successful completion of all phase requirements. The certificate of training will include the student's name, course title and phase, and completion date.

e. Records for disenrolled students must be maintained for two years IAW AR 25-400-2/TRADOC Reg 351-10.

TR 350-18, para 3-32.

3-32. Notice of academic, denied enrollment or withdrawal. The TASS battalion commander/commandant will provide written notice to the first general officer in the student's chain-of-command, company commander, and to the order issuing headquarters, if appropriate, for students who:

a. Are denied enrollment due to height/weight, or have profile guidance given in DA message 081650Z Mar 95, subject: APFT and Height/Weight Requirements; and DA message 292030Z Jan 99.

b. Fail to provide adequate documentation of prerequisites to attend the course.

c. Withdraw from the course for any reason.

d. Fail to meet course standards, either academically, physically, or through misconduct.

DA MESSAGE
R 081650Z MAR 95 ZOC ZEO T ALL US ARMY REPS AND ACTIVITIES
FM DA WASHINGTON DC//DAMO-TR//
TO ALARACT
AIG 7300
BT
UNCLAS ALARACT 011/95 SECTION 01 OF 02

SUBJECT: APFT AND HEIGHT/WEIGHT REQUIREMENTS

A. AR 350-41, TRAINING IN UNITS, CHAPTER 9, PHYSICAL FITNESS, 19 MARCH 1993.

B. FM 21-20, PHYSICAL FITNESS TRAINING, 30 SEPTEMBER 1992.

C. MESSAGE, HQDA, DAMO-TR, 031936Z MAY 1990, SUBJECT, ARMY PHYSICAL FITNESS TESTING (APFT) DURING NONCOMMISSIONED OFFICER EDUCATION SYSTEM (NCOES) COURSES.

D. MESSAGE, TRADOC, ATTG-ZA, 160157Z MARCH 1993, ARMY PHYSICAL FITNESS TESTING (APFT) DURING PROFESSIONAL DEVELOPMENT COURSES.

1. QUALITY IS THE FUNDAMENTAL IMPERATIVE OF THE ARMY INTO THE NEXT CENTURY. AS OUR ARMY DOWNSIZES AND CHANGES TO MEET THE CHALLENGES OF THE 21ST CENTURY, IT IS CRITICAL THAT SOLDIERS, PARTICULARLY THOSE BEING TRAINED TO LEAD AMERICA'S ARMY, MEET THE HIGHEST PROFESSIONAL STANDARDS.

2. THE PURPOSE OF THIS MESSAGE IS TO ANNOUNCE POLICY CHANGES PERTAINING TO PHYSICAL FITNESS STANDARDS AND ENFORCEMENT OF THESE
STANDARDS DURING INSTITUTIONAL TRAINING. THIS MESSAGE WILL RESCIND REFERENCE C AND D. THE FOLLOWING CHANGES ARE EFFECTIVE 1 APRIL 1995 FOR AC SCHOOLS AND 1 JUNE 1995 FOR RC SCHOOLS. THESE CHANGES HAVE BEEN APPROVED BY THE SECRETARY OF THE ARMY. THIS MESSAGE CHANGE WILL BE FOLLOWED BY OFFICIAL CHANGES IN AR 350-41 AND AR 351-1. THIS MESSAGE DOES NOT CHANGE ARMY POLICY ON PREGNANT SOLDIERS AS CONTAINED IN ARMY REGULATION 40-501.

A. SOLDIERS ATTENDING INSTITUTIONAL TRAINING COURSES MUST MEET WEIGHT AND PHYSICAL FITNESS STANDARDS LISTED IN AR 600-9 AND AR 350-41. EXCEPT AS DESCRIBED IN PARAGRAPH 2H, PERSONNEL NOT MEETING WEIGHT AND PHYSICAL FITNESS STANDARDS IN COURSES IDENTIFIED IN PARAGRAPH B BELOW WILL BE DENIED ENROLLMENT AND A MEMORANDUM ADDRESSING THEIR FAILURE TO MAINTAIN STANDARDS WILL BE FORWARDED BY THE COMMANDANT TO THE FIRST GENERAL OFFICER IN THEIR CHAIN OF COMMAND. ADDITIONAL REQUIREMENTS FOR ENROLLMENT DENIAL ARE AT PARAGRAPH 3.

B. BEFORE STARTING THE CLASS, AS AN ENROLLMENT REQUIREMENT, SOLDIERS MUST TAKE AND PASS AN APFT (STANDARD OR APPROVED ALTERNATE) ADMINISTERED AT THE SCHOOL FOR THE FOLLOWING FUNCTIONAL AND PROFESSIONAL DEVELOPMENT COURSES: PLDC, BNCOC, ANCOC (FOR RC BNCOC/ANCOC PHASE I COMMON LEADER TRAINING ONLY), BATTLE STAFF NCO COURSE, FIRST SERGEANT COURSE, CSMC, WOCS, WOAC, WOSC, OCS, (ALTERNATE APFT IS NOT APPLICABLE TO OCS AND WOCS).

C. SOLDIERS REPORTING TO AIRBORNE AND RANGER COURSES, SPECIAL FORCES ASSESSMENT AND SELECTION, MUST PASS A SPECIAL APFT PRIOR TO ENROLLMENT. THOSE WHO FAIL WILL BE DENIED ENROLLMENT AND RETURNED TO UNIT OF ASSIGNMENT.

D. SOLDIERS ATTENDING OTHER PROFESSIONAL DEVELOPMENT COURSES NOT MENTIONED ABOVE, IN EITHER A PCS OR TDY STATUS, FOR EXAMPLE (SMC, SMC (NON RESIDENT COURSE), OAC, CGSC, AWC), AND ANY OTHER RESIDENT COURSE EIGHT WEEKS OR LONGER, MUST PASS THE APFT TO GRADUATE (THIS INCLUDES RC IN AT, ADT AND/OR IDT STATUS). THOSE WHO FAIL TO PASS THE APFT (STANDARD OR APPROVED ALTERNATE) WILL NOT GRADUATE. WITH THE EXCEPTION OF PARAGRAPH 2B, THIS MESSAGE WILL NOT AFFECT PREGNANT SOLDIERS. AR 40-501, STANDARDS OF MEDICAL FITNESS, CHAPTER 7, PHYSICAL PROFILING, PARAGRAPH 7-9, PROFILING

PREGNANT SERVICEWOMEN WILL GOVERN POLICIES REGARDING PREGNANT SOLDIERS. THE ACADEMIC EVALUATION REPORT (DA FORM 1059, 1059-1, OR 1059-2) WILL INDICATE THAT THE SOLDIER IS A NON GRADUATE BECAUSE OF A FAILURE TO MEET PHYSICAL FITNESS STANDARDS (THE REQUIREMENTS OUTLINED IN PARA B AND D ABOVE DO NOT APPLY TO SCHOOLS CONDUCTING MOS RECLASSIFICATION COURSE OR TRAINING. POLICIES GOVERNING THOSE COURSES REMAIN IN PLACE).

E. SERVICE MEMBERS OF OTHER SERVICES WILL ADHERE TO ARMY POLICY AS PRESCRIBED IN THIS MESSAGE WHEN ATTENDING AN ARMY COURSE OF INSTRUCTION.

F. PHYSICAL FITNESS AND WEIGHT STANDARDS DO NOT APPLY TO FOREIGN STUDENTS. THESE STUDENTS MAY PARTICIPATE IN PHYSICAL FITNESS ON A VOLUNTARY BASIS. FAILURE TO ACHIEVE THE MINIMUM PASSING SCORE ON THE PHYSICAL FITNESS TEST WILL NOT BE NOTED ON THE ACADEMIC REPORT, BUT VOLUNTARY PARTICIPATION AND PASSING TEST SCORES MAY BE NOTED.

G. PERSONNEL WHO DO NOT MEET WEIGHT STANDARDS ARE NOT AUTHORIZED TO ATTEND PROFESSIONAL DEVELOPMENT SCHOOLS AND SOLDIERS WHO DO NOT MEET FITNESS STANDARDS ARE NOT ELIGIBLE TO ATTEND COURSES IDENTIFIED IN PARAGRAPH B. ALL SOLDIERS SCHEDULED FOR ATTENDANCE AT PROFESSIONAL DEVELOPMENT SCHOOLS WILL BE SCREENED PRIOR TO DEPARTING THEIR HOME STATIONS/LOSING COMMAND. THEIR HEIGHT, WEIGHT (AND THE WORD “PASS” IF THEY ARE WITHIN STANDARDS) AND DATE OF LAST SUCCESSFUL APFT, WILL BE RECORDED ON THEIR TDY ORDERS (DD FORM 1610, BLOCK 16) OR ON THEIR PCS PACKET. SOLDIERS WHO EXCEED ESTABLISHED SCREENING WEIGHT OR WHO FAILED TO ACHIEVE MINIMUM PASSING STANDARDS ON LAST APFT, WILL NOT BE ALLOWED TO DEPART THEIR COMMAND UNTIL THE UNIT COMMANDER HAS DETERMINED THEY MEET HEIGHT/WEIGHT AND PHYSICAL FITNESS STANDARDS.

H. TRADOC/FORSCOM SCHOOL COMMANDANTS AND COMMANDANTS/COMMANDERS OF ARNG-CONDUCTED SCHOOLS (REGIONAL NCO ACADEMIES AND/OR STATE MILITARY ACADEMIES) U.S. ARMY RESERVE FORCES SCHOOLS, USARC NCO ACADEMIES AND/OR THE ARMY RESERVE READINESS TRAINING CENTER, WILL WEIGH, AND FOR COURSES IDENTIFIED IN PARAGRAPH B, TEST STUDENTS PRIOR TO COURSE ENROLLMENT. STUDENTS WHO EXCEED ESTABLISHED WEIGHT AND/OR BODY FAT STANDARDS WILL BE DENIED ENROLLMENT AND WILL BE PROCESSED IN ACCORDANCE WITH AR 600-9 OR PARAGRAPH 3 BELOW. SOLDIERS WHO FAIL TO MEET MINIMUM APFT STANDARDS WILL NOT BE ENROLLED AND WILL BE PROCESSED IN ACCORDANCE WITH AR 350-41 OR PARAGRAPH 3 BELOW, UNLESS THE SCHOOL COMMANDANT DETERMINES THAT UNUSUAL CIRCUMSTANCES EXISTED THAT INTERFERED WITH THE SOLDIER’S ABILITY TO PASS THE APFT. IN SUCH CASES, THE SOLDIER WILL BE ENROLLED AND GIVEN A REASONABLE PERIOD OF TIME IN WHICH TO COMPLETE A SECOND APFT. IF THE SOLDIER AGAIN FAILS TO MEET THE MINIMUM APFT

STANDARDS, HE OR SHE WILL BE DISENROLLED AND PROCESSED IN ACCORDANCE WITH AR 350-41 OR PARAGRAPH 3 BELOW. COMMANDANTS MUST ENSURE GUIDANCE OUTLINED IN FM 21-20, CHAPTER 14, PAGE 14-8 (SUPERVISION) IS ADHERED TO DURING TESTING.

3. ENROLLMENT DENIALS. COMMANDANTS WILL TAKE THE FOLLOWING ACTIONS FOR STUDENTS DENIED ENROLLMENT FOR FAILING TO MEET APFT AND/OR WEIGHT STANDARDS:

A. ACTIVE COMPONENT SOLDIERS DENIED ENROLLMENT:

(1) TDY AND RETURN. SOLDIERS WILL BE RETURNED IMMEDIATELY TO UNIT OF ASSIGNMENT. COMMANDANTS WILL IMMEDIATELY SEND MEMORANDUM TO SOLDIER'S UNIT COMMANDER, WHICH ADDRESSES SOLDIER'S DENIED ENROLLMENT. UNIT COMMANDER IS RESPONSIBLE FOR INITIATING ACTIONS TO INCLUDE FLAGGING AND REMOVING SOLDIER FROM DA SELECTION LIST AND LOCAL OML AS APPLICABLE. THE COMMAND MAY BE HELD RESPONSIBLE FOR REIMBURSING THE TRAINING OPEN ALLOTMENT FOR ALL TRAVEL RELATED COSTS.

(2) TDY ENROUTE. SOLDIER WILL BE ATTACHED TO THE INSTALLATION PENDING CLARIFICATION OF ASSIGNMENT INSTRUCTIONS FOR FOLLOW-ON ASSIGNMENT. THE SCHOOL COMMANDANT WILL NOTIFY PERSCOM OF THE SOLDIER'S INELIGIBILITY FOR SCHOOLING AND REQUEST CLARIFICATION OF ASSIGNMENT INSTRUCTIONS. GAINING UNIT COMMANDER IS RESPONSIBLE BT

TR 350-10, para 2-6.

2-6. Physical fitness, weight control, and profiles. See ARs 40-501, 350-1, and 600-9, National Guard Regulation (NGR) 40-501 and TRADOC Reg 350-18. All Active Component (AC) and Active Guard Reserve (AGR) officers, warrant officers and NCOs who reach the age of 40 will receive their over 40 physical, to include a cardiovascular medical screening program (CVSP) prior to arrival at OES, WOES, NCOES or functional professional development courses. All other soldiers who have reached the age of 40, whose last periodic physical was within the last 5 years, will receive a CVSP in conjunction with their next periodic physical examination. Per AR 40-501, for over 40 soldiers who **have** had a periodic physical within the last 5 years, there is no need to require a CVSP prior to continuing physical training or participating in APFT. Over 40 soldiers arriving at schools who **have not** had a periodic physical within the last 5 years will be denied enrollment and not be allowed to start the course curriculum. This policy will be included in all proponent developed course management plans per TRADOC Reg 350-70, and included in future editions of the pre-execution checklists found in TRADOC Reg 350-18.

a. School's SGLs/instructors will not be assigned to duty with a profile that precludes them from performing all of their duties (i.e., running, marching, or wearing of required equipment, etc.). Exceptions to this policy are SMC and CSMC SGLs/senior small

group leaders (SSGLs), who are not required to conduct student performance or academic evaluations on these tasks as part of the course curriculum requirements.

b. Per DA message R251850Z Jul 01, subject: Clarification and Reinforcement of Army Training Policies, attendees of OES and WOES will pass the Army physical fitness test (APFT) prior to their course graduation date. Noncommissioned Officer Education System and NCO functional course (First Sergeant/Battle Staff Courses) attendees will be administered the standard APFT within the first 72 hours of enrollment. Those who fail this initial test will be given one retest to be administered sometime between academic day 7 and 14. Without exception, students must pass the APFT prior to the end of the course or phase (whichever occurs first) to graduate. BNCOC and ANCOC students must pass the APFT before the end of Phase I (common core). In all cases, soldiers who fail the APFT retest will be dropped/dismissed from the course for failure to meet APFT standards. Soldiers failing the initial APFT and found medically unqualified to retest within the required period of time will receive a medical dismissal, (for non-prejudicial medical reasons), returned to their unit, and allowed to be rescheduled to attend another class when medically capable.

c. Students attending NCOES, NCO functional and NCO level reclassification courses will be weighed-in/taped in accordance with (IAW) AR 600-9 for compliance with Army height and weight standards at the beginning of each course. Soldiers that are TDY en-route will be screened prior to departing their home station/losing command. Their height and weight data will be recorded on their TDY orders (DD Form 1610, block 16) or on their permanent change of station packet. Soldiers exceeding the screening table weight in table 1 will not be allowed to depart until their commander has determined they meet Army body fat composition standards. Students arriving at schools not meeting the standards, will be denied enrollment in the course or phase and returned to their unit.

d. Students with temporary profiles that prohibit full participation in the completion of course requirements will be denied enrollment. Students will not be sent to or enrolled in NCOES courses holding a temporary profile (except for shaving or non-performance deterring profiles), or if they are pregnant, unless the soldier's attending physician provides written documentation that states the soldier can perform/participate in all course physical performance requirements. This includes APFT, marching, and field training exercises. Soldiers will also not be allowed to attend NCOES courses during the recovery period that follows the end date of a temporary profile. Active duty/AGR soldiers holding a permanent P3/P4 profile must arrive for training with a signed copy of their Medical Review Board. Reserve Component (RC) soldiers must possess a complete copy of their DA Form 3349 to be enrolled. Soldiers with a permanent profile will be allowed to attend professional development courses and train within the limits of their profile provided they can otherwise meet all course prerequisites and graduation requirements. The NCOA commandant may dismiss a soldier from a course or refuse to enroll a soldier in NCOES whenever they determine that due to a soldier's permanent or temporary profile restrictions, the soldier would not be able to complete 100 percent of the course requirements to Army/course minimum standards. (For example, APFT,

FTX, lanes training exercise (LTX), wear load bearing equipment, perform evaluated performance tasks, etc.)

e. An APFT is not required for enrollment or graduation at Phase II ANCOC or BNCOC, or at MOS reclassification courses/training. Soldiers will not be required to take an APFT during these courses. Therefore, no APFT entry is required for DA Form 1059 completion purposes for these Phases/courses.

TR 350-6, Ch 3.

Chapter 3
Training Policies, Procedures, and Administration
3-1. Initial Entry Training strategy. Initial Entry Training commanders and commandants will ensure their training programs incorporate the following tenets of TRADOC's IET strategy:
a. The chain-of-command is responsible for training. Commanders must ensure that training meets POI standards and conforms to TRADOC policies on the conduct of training.

b. Drill sergeants will conduct as much of the skill training as possible in BCT and OSUT. When drill sergeants are the primary trainers, the role of the committee group will be to augment cadre instructors, serve as subject matter experts (SME), and advise on the conduct of training.

c. Primarily, SMEs will conduct MOS training; however, to the maximum extent feasible, drill sergeants will be involved in the technical training in AIT. Drill sergeants are the MOS role models. They will assist with MOS skill practice and will, at times, be assigned additional duties as assistant instructors to augment SME instruction. Academic instructors must assist unit cadre in the soldierization effort.

d. Cadre must be proficient in the tasks trained. Initial Entry Training commanders will establish certification programs IAW paragraph 3-6c to ensure that cadre have the competence and skill proficiency to execute and evaluate effective training.

e. Military occupational specialty training must be taught in as realistic an environment as possible. Scenario-driven FTXs are used to achieve this realism. These FTXs should focus on the warfighting application of acquired MOS skills and reinforce basic combat and teamwork skills.

f. Through a system of rigorous evaluations of training and testing, TRADOC, ATC commanders, and school commandants must ensure that training standards are enforced.

3-2. Development of training programs. The proponent school is responsible for POIs. New and revised POIs will be prepared and approved IAW TRADOC Reg 350-70.

Commanders will ensure all training periods are initially risk assessed and the risk assessment is updated as factors change.

3-3. Modifications to training programs.
a. The time allotted for subjects in a POI may vary depending on the aptitude and achievement levels of each group of soldiers, the number of soldiers in each cycle or class, the instructor-to-student ratio, and the availability of facilities. For these reasons, adjustments may be made to the amount of time devoted to a task provided the learning objectives and performance standards are met and the overall course length remains unchanged.

b. Headquarters, TRADOC, ATTN: ATTG-IT, will be informed of temporary changes to IET training programs that do not require a revision to the POI. Information provided will include the purpose and nature of the temporary change or planned pilot, its duration, and the number of students involved. Army training centers will coordinate plans for such pilots with proponent schools. A risk assessment will be conducted in support of temporary changes to identify any new hazards, changes in residual risk, and appropriate hazard controls and/or risk countermeasures necessary to ensure training safety. The supporting safety office will review and validate the risk assessment.

c. Army training center commanders' recommendations are an important part of the continuing POI review and update process. Army training center commanders will submit recommended POI changes to the appropriate schools. The schools will evaluate these recommendations and, if appropriate, revise course materials, individual training plans (ITPs), course administrative data (CADs), and POIs IAW TRADOC Reg 350-70. The proponent school commandants will make the final decision on task selection and training methods.

3-4. Company training starts.
a. Basic Combat Training and OSUT companies must begin the training cycles NLT Friday after the close of the reception week (RW). Advanced Individual Training soldiers must begin training NLT the scheduled start date as established in ATRRS. This is driven by the fact that the U.S. Army Recruiting Command (USAREC) operates on a RW that begins on Tuesday and ends the following Monday. The last soldier to arrive in the RECBN on Monday must be processed and shipped to a training company NLT Friday IAW AR 612-201. The RECBN will complete processing within 4 working days, less weekends and holidays, after the receptee arrives at the TRADOC installation.

b. The standard BCT POI is 9 weeks (54 training days) in duration. BCT companies will graduate after 9 weeks of training and ship soldiers to AIT units on Friday of graduation week in order for graduates to report for AIT on the date indicated in ATRRS.

c. Basic Combat Training installations must ship soldiers on time to ensure they arrive and link with their AIT course. Basic Combat Training installations must also establish a system to identify soldiers with critical AIT Hard-Start dates to ensure that appropriate

actions are taken to enable those soldiers to meet their scheduled AIT start dates, provided they have met all graduation requirements.

d. One Station Unit Training units normally ship to the next unit of assignment NLT 1 day following graduation. Exceptions will be made for additional requirements for MOS-specific training, additional skill identifiers, and special requirements (e.g., security clearances).

e. Advanced Individual Training will be conducted based on the approved POI length, starting and graduating on the dates reflected in ATRRS. No additional time for a "zero week" or additional soldierization is authorized.

3-5. Training schedules.
a. The training week is managed through the training schedule. The principles of scheduling are outlined in FM 25-101. Local directives and the following guidelines will govern non-training time:

(1) In garrison, IET soldiers will have the opportunity for 7 hours of continuous sleep per night, unless the soldier is scheduled for duty (i.e.; fire guard or CQ runner). During field training, the length of the training day and time for sleep will vary based on tactical and other training requirements, as established in the appropriate POI. Commanders will ensure that the tactical framework of field training allows sufficient time for rest.

(2) In garrison, soldiers will be given at least 1 hour of preparation time each day to take care of personal needs. During this time, soldiers will not receive training.

(3) Soldiers will be afforded the opportunity to attend a religious service weekly.

b. Unless authorized by the installation commander, POI training will not be conducted on Sundays. Activities required to prepare for the next week's training may be conducted after 1300.

c. Unless authorized by the installation commander, core training requiring post assets will not be conducted on Saturdays or Federal holidays.

3-6. Lesson plans and instructor preparation.
a. The tasks and subjects in a POI form the basis for each period of instruction. Lesson plans will be prepared by the proponent and kept up-to-date for each period of instruction.

b. Each ATC and school will establish a system for monitoring and improving the quality of instruction. Essential to this is a standardization/certification process to ensure that each instructor is fully qualified and current in all aspects of their subject. This certification will be IAW TRADOC Reg 350-70. All IET instructors will accomplish semiannual physical fitness testing.

c. All IET cadre will accomplish semiannual physical fitness testing. All cadre responsible for conducting instruction and/or evaluating training will be certified on all

hands-on phase tasks annually. Cadre in BCT/OSUT units will be certified on those phase tasks listed in the BCT POI and will also accomplish annual weapons qualification. Cadre in AIT units will provide reinforcement training on, and reevaluation of, those BCT common skills tasks selected by the commander. Records of all certification or qualification will be maintained at the battalion level.

3-7. Training records.
a. A DA Form 5286-R (Individual Training Record (ITR)) will be initiated and maintained by the soldier's assigned company for every soldier attending IET. The modified DA Form 5286-R, available in the Automated Instructional Management System-Personal Computer (AIMS-PC) database, will be used to document the completion of training requirements in all IET courses. This modified form streamlines the information required and provides a standardized reporting format for all IET sites. Additional guidance and a sample modified DA Form 5286-R is at appendix G.

b. Noncommissioned officers attending MOS producing courses in order to reclassify into another MOS, or prior-service personnel in the grade of E5 or higher enlisting IAW paragraph 2-17, will receive a DA Form 1059 (Service School Academic Evaluation Report) upon completion of their course, regardless of course length.

3-8. Makeup training. All training specified in a TRADOC-approved IET POI, as required for graduation, will be made up if missed. Make-up training for BCT and Phases I-III of OSUT will consist of training that will enable soldiers to meet mandated BCT graduation requirements as outlined in paragraph 1-5c(1). The quality of makeup training will be the same as that of regularly scheduled instruction. The soldier will be required to meet the performance/learning objectives specified in the POI for the instruction missed. Time required for makeup training will be determined locally.

3-9. Concurrent training. Concurrent training will be conducted as prescribed in applicable POIs. If not specifically prescribed by a POI, the training unit commander will schedule and conduct concurrent training. This training should be designed to reinforce critical soldierization skills, common skills, and human relations subjects (i.e., values, traditions, EO/POSH, etc.).

3-10. On-the-job training (OJT). On-the-job training is appropriate for those holdover soldiers who have completed all POI requirements and are retained in the unit for administrative purposes. Commanders and trainers must ensure that clearly stated OJT objectives are being achieved, and that soldiers involved are being employed productively in MOS or MOS-related duties.

3-11. Early arrivals/holds. Soldiers arriving early for a scheduled course, or soldiers in a hold status waiting for a training unit to fill, will be actively engaged in introductory training for the course they are to attend, and will not be used solely for performing details. This introductory training may consist of orientation, in-processing, PFT, and unit-taught subjects selected by the unit commander. These soldiers will be posted in ATRRS on the "HO" display as being in a hold status ("H") awaiting class start ("6"). The

hold status for an "H-6" soldier automatically ends when the soldier starts training and is posted in a class in ATRRS with input status of "I."

3-12. TRADOC Pam 600-4 (IET Soldier's Handbook).
a. TRADOC Pam 600-4 will be issued to all soldiers entering BCT and OSUT. The pamphlet provides soldiers with a pocket reference for subjects taught and tested in BCT, with emphasis on the tasks in the Soldier's Manual of Common Tasks (STP-21-1-SMCT).

b. Commanders will ensure that IET soldiers departing for AIT have a serviceable copy of the TRADOC Pam 600-4 in their possession.

3-13. Body composition standards in IET.
a. Accessions standards for body composition, as stated in AR 40-501 and message, DAPE-MPA, 211255Z SEP 95, Subject: Height, Weight and Body Fat Standards: Accession Versus Retention, apply during the first 6 months of the IET soldier's active duty service. The standards of AR 600-9 are applicable after the initial 6-month period.

b. Reserve component soldiers enrolled in the split-training option must meet accession body composition standards for the successive period of active duty training.

c. Initial entry soldiers will be measured and weighed within 7 days prior to graduation from AIT/OSUT. This information will be entered on the soldier's DA Form 5286-R.

d. Soldiers who exceed 6 months active service and fail to meet the body composition standards IAW AR 600-9 will be enrolled in the Army Body Composition Program and flagged. These soldiers will be shipped to the gaining unit and the documentation, to include the flag (transferable), will be forwarded to the gaining unit.

e. Prior service soldiers are required to meet the body composition standards of AR 600-9 upon reentry on active duty.

f. Reclassified soldiers (those soldiers currently holding a MOS) must meet the requirements of AR 600-9.

(1) Reclassified soldiers with temporary profiles, which prevent completion of the APFT, will not be enrolled in MOS producing courses.

(2) Soldiers in temporary duty (TDY) and return status will not be allowed to attend MOS producing courses if they do not meet the body composition standards as prescribed in AR 600-9. Soldiers not meeting standards will be returned to their home station.

(3) Soldiers in TDY enroute or PCS will not be allowed to attend MOS producing courses if they do not meet the prescribed body composition standards as prescribed in AR 600-9. These soldiers will be attached to the installation pending clarification of assignment instructions for follow-on training. The school commandant will notify U.S. Total Army Personnel Command (PERSCOM) of the soldier's ineligibility for schooling and request clarification of assignment instructions.

3-14. Drill sergeant uniform.
a. The drill sergeant's regular working uniform consists of the campaign/bush hat and battle dress uniform. The Class A uniform with campaign hat, and the Class B uniform with campaign hat, may be worn on appropriate occasions.

b. During periods of training which call for a tactical environment (e.g., tactical road marches, FTXs), unit cadre will be in the same uniform as the IET soldiers. During all other periods of training, the drill sergeant will wear the prescribed drill sergeant uniform.

c. For PFT, the uniform for IET soldiers and cadre will be the Army issue physical fitness uniform (PFU). Installations may use a variety of color-coded road guard vests or reflective equipment to distinguish between IET soldiers and cadre.

3-15. Initial entry soldiers held over for security clearance.
a. Initial entry soldiers who have enlisted for MOS training that requires a security investigation will be processed IAW AR 612-201.

b. Installation security managers are authorized to grant interim collateral security clearances in the name of the Commander, Central Clearance Facility (CCF), Fort Meade, MD, to qualified IET soldiers of all components IAW AR 380-67, so they may enter training. Memorandum, DAMI-CH, Headquarters, Department of the Army (HQDA) ODCSINT, 19 Feb 99, subject: Personnel Security, provides adjudicative guidelines for determining eligibility for access to classified information. The intent is to move all qualified IET soldiers to the AIT location.

c. Installation Security Managers must receive authorization from CCF to ship soldiers who require interim clearances with Sensitive Compartmented Information (SCI) access prior to shipment to AIT locations. Soldiers may depart AIT/OSUT with an interim collateral clearance, provided they have a National Agency Check/Local Area Check investigation favorably pending at the Defense Security Service or Office of Personnel Management.

d. Memorandum, ATBO-BP, HQ TRADOC, 14 Apr 97, subject: Renegotiation of MOS for Holdover Trainees Pending Security Clearances, provides information and guidance on processing trainees in security hold status. Initial entry soldiers holding MOS identified in table 3-1, who have known major derogatory information, will be considered security holdovers at BCT installations until a U.S. Army Central Personnel Security Clearance Facility (USACCF) Letter of Intent is received or a favorable security clearance determination has been made by USACCF. Initial entry soldiers must have an interim clearance by the AIT week listed in table 3-1 to continue training.

e. Initial entry soldiers in MOS 98XL may ship to DLI for language training. Initial entry soldiers in MOS 98G (Heritage Speakers) may ship to Goodfellow Air Force Base, TX for additional language and military subject training.

f. Soldiers reclassifying into another MOS requiring a security clearance may not ship until the appropriate clearance requirements for that MOS have been met.

Table 3-1
MOS security clearance requirements

MOS	KNOWN DEROGATORY INFORMATION	REQUIREMENT TO CONTINUE TRAINING
13C	Security Holdover at BCT	Interim Secret required by Week 3 of AIT
13R	Security Holdover at BCT	Interim Secret required by Week 4 of AIT
14 Series	Security Holdover at BCT	Interim Secret required by Week 2 of AIT
96B	Security Holdover at BCT	Interim Secret required by Week 1 of AIT Interim **TOP SECRET W/SCI** by Week 12 of AIT
96D	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 1 of AIT
96H	Security Holdover at BCT	Interim Secret required by Week 1 of AIT
96R	Security Holdover at BCT	Interim Secret required by Week 5 of AIT
96U	Security Holdover at BCT	Interim Secret required by Week 1 of AIT
97B	Security Holdover at BCT	Interim Secret required by Week 1 of AIT Interim **TOP SECRET W/SCI** by Week 10 of AIT
97E	Security Holdover at BCT	Interim Secret required by Week 5 of AIT
98C	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 1 of AIT
98H	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 5 of AIT
98J	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 1 of AIT
98K	Security Holdover at BCT	Interim **TOP SECRET W/SCI** by Week 1 of AIT

3-16. Competition and awards.
a. In general, soldiers and units are to compete against common standards rather than against each other. Competition should recognize each soldier or unit that meets or exceeds these standards.

b. All levels of command must constantly monitor competitive programs and ensure that competition supports, rather than detracts, from training objectives.

c. A comprehensive award system should be established within each ATC/school. This system should provide recognition for both IET soldiers and cadre personnel.

d. Care will be taken to ensure statistics do not assume major importance and create undue pressure on the IET soldier or the cadre.

3-17. Initial Entry Training soldier details.
a. Use of IET soldiers for details will be held to a minimum. The type and frequency of details to be performed by soldiers will be strictly controlled.

b. As appropriate, consideration will be given to using an entire unit (section, squad, platoon, class, or company) to meet requirements, rather than distributing the requirement over several different units. This will lessen the need for individuals to make up training, and provides additional opportunities for building teamwork.

c. To the maximum extent feasible, IET cadre will supervise IET soldiers when they are performing details. In cases where non-IET cadre are supervising IET soldiers, the supervisor will have attended the SCTC or ISCTC. Maximum effort will be made to utilize this time for reinforcement of soldierization skills.

d. Any civilian employee overseeing IET soldiers on a routine basis will be ISCTC qualified. The duties and responsibilities related to IET soldier management will be included in the civilian's official job description and on their annual performance evaluation.

3-18. Initial Entry Training soldier leaders.
a. Initial entry soldiers may serve as squad, crew, group, or section leaders and platoon guides during any or all phases of IET. Soldiers appointed as IET soldier leaders will be taught the functions, duties, and responsibilities of their positions prior to assuming those duties.

(1) Initial entry soldiers are authorized to wear brassards indicating rank (corporal for squad, crew, group, or section leaders; sergeant for assistant platoon sergeants) as outlined in AR 670-1. They are not to be considered as NCOs, nor accorded the privileges of NCOs.

(2) Initial entry soldiers for reclassification training, or who have prior service, may be appointed to leadership positions identified above.

(a) Reclassified and prior-service soldiers in the grades private through specialist are authorized to hold IET soldier leader positions, but are not to be considered as NCOs. Privileges will be IAW paragraph 2-17c(6).

(b) Noncommissioned officers will wear their authorized rank, and be considered and treated as NCOs. Privileges will be IAW paragraph 2-17c(6).

b. Initial Entry Training soldier leaders will not be assigned responsibility for a mission or function that is normally the responsibility of a permanent party soldier. Initial entry training soldier leaders will be allowed to use their initiative, authority, and to assume responsibilities commensurate with their position, experience, and ability while under supervision of IET cadre.

c. Initial entry training soldier leaders will not be used as primary instructors during formal instruction. They may be used as assistant instructors, provided such duty or preparation does not keep them from scheduled instruction.

3-19. Medical/dental treatment.
a. Soldiers will be informed of sick call procedures upon arrival in their training units. Key information on sick call and emergency medical/dental procedures will be posted conspicuously. Soldiers will be instructed on the need to seek prompt medical attention regardless of interruptions in their training.

b. Medical treatment facilities will use approved forms to document soldiers' medical problems, treatment received, and prescribed courses of action/treatment.

(1) TRADOC Form 385-2-5-R-E, Record of Injury. In cases of accident or injury, the unit will use this form in place of DD Form 689. Units will ensure that all individuals injured during training or mission sustainment report to troop medical facilities with a completed TRADOC injury form. Section I of this form will be completed by the supervisor (military or civilian) and given to the injured person, or medical transport personnel if the individual is incapacitated. The form will be taken to the medical treatment facility and given to the medical officer or attendant performing medical treatment. Detailed guidance on the use of this form is contained in TRADOC Regulation 385-2. TRADOC Form 385-2-5-R-E is shown at appendix H (fig H-1).

(2) DD Form 689, Individual Sick Slip. The unit uses this form to authorize a soldier's medical and/or dental treatment. The medical treatment facility completes the form and annotates the patient's disposition. The health care provider should include information on activities the soldier can perform, as well as any physical limitations imposed. This form may also be used to record temporary physical profiles of 30 days or less in duration. Detailed guidance on the use of this form is contained in AR 40-501. A DD Form 689 is shown at appendix H (fig H-2).

(3) DA Form 3349, Physical Profile. This form may be used to record both permanent profiles and temporary profiles in excess of 30 days in duration. Temporary profiles written on DA Form 3349 will not exceed 3 months in duration, except in specific circumstances outlined in AR 40-501. A DA Form 3349 is shown at appendix H (fig H-3).

c. Initial entry soldiers who miss three or more consecutive full days of training due to illness or injury will be reported in ATRRS as a "Medical Holdover." Soldiers will remain coded as "Medical Holdovers" until they have recovered from their illness/injury, or for as long as they remain on a profile. Once the profile has expired, the soldier will resume training and be removed as a "Medical Holdover" in ATRRS.

d. Graduates of BCT on temporary profiles will not be shipped to their AIT units.

e. Phase IV and V IET soldiers who are injured and receive permanent profiles prior to graduation will be evaluated to determine if they are fit for retention. Soldiers determined fit for retention will be evaluated against MOS Physical capacity or stamina, Upper extremities, Lower extremities, Hearing and ear, Eyes, Psychiatric (PULHES) minimums. Initial entry soldiers meeting MOS minimums will continue training IAW their profile. Installation Adjutant Generals will contact PERSCOM to negotiate a new MOS for those who fail to meet PULHES minimums. Soldiers determined not fit for retention will be separated.

3-20. Personal health and hygiene.
a. To instill good hygiene habits in all soldiers, each installation will establish a comprehensive personal hygiene program.

b. Each installation will provide soldiers an orientation on proper nutrition; good dietary habits; the adverse effects of alcohol, drugs, and tobacco products; stress management; Human Immunodeficiency Virus prevention education; and the Army Health Promotion Program.

c. Commanders and leaders, in cooperation with installation medical authorities, and as appropriate, safety and fire and emergency services staffs, will implement a comprehensive program to ensure the adequacy of billeting and maintenance of sanitary, healthful conditions.

3-21. Prevention of heat and cold injury.
a. Installation commanders will develop and implement detailed programs for prevention of heat and cold injury. TRADOC Reg 350-29, technical bulletin (TB) medical (MED) 507, and TB MED 81 will be used as the bases for locally developed programs. Commanders should also coordinate with the local Medical Department Activity Preventive Medicine Service for assistance in developing their programs.

b. As a minimum, programs will provide the following:
(1) An acclimatization period for new soldiers at the beginning of all training cycles. Initially low exertion levels that increase gradually will mark activity during this period. All soldiers will receive a mandatory briefing or class on prevention of heat/cold injuries as part of in-processing.
(2) A notification system to ensure that each commander, drill sergeant, and instructional committee member knows the current wet bulb globe temperature (WBGT) indexes and wind chill factors. Ensure that one portable WBGT kit (NSN 6665-00-159-2218) per training company (BCT, OSUT, and AIT) is issued. Cadre members will have the pocket-sized graphic training aid (GTA) 5-8-12, or another suitable locally produced GTA, with them during training.
(3) A specific local policy on training activities that may and may not be conducted during the various WBGT indexes/wind chill factors. Policies should include

the statement that during cold weather, use of non-standard portable space heaters is prohibited in field training and operations.

3-22. Severe weather notification. Severe weather notification plans will be developed, coordinated, and periodically tested. These plans will include the requirement for units/activities to acknowledge the receipt of such notification. The organization issuing the warning should maintain a log of the time of notice, receipt of acknowledgement(s), and person(s) acknowledging receipt.

3-23. Hearing conservation program. Exposure to high intensity noise may cause permanent hearing loss, which can affect combat efficiency. Each ATC will follow a hearing conservation program IAW AR 40-5 and DA Pam 40-501. Commanders at all levels will enforce the requirement for all IET soldiers, instructors, and cadre to wear earplugs, or other approved hearing protective devices, when exposed to noise levels (e.g., range firing) that may be hazardous to hearing. Leaders are responsible for ensuring the hearing conservation program is implemented in their units, especially the monitoring and enforcement of wearing hearing protection in noise hazardous areas.

3-24. Safety.

a. Realistic training exercises will be conducted within the bounds of an effective risk management program. Before training, all cadre and IET soldiers will be thoroughly briefed on the risks associated with each specific training event/activity. This will include identification of specific hazards and those controls to be used to reduce the risk of accidents associated with the training event. IET risk assessment will address all applicable safety procedures and potential accident-producing conditions. Unusual vehicle, water, weapons safety considerations, and environmental hazards in training areas will be stressed prior to and during the training. Training cadre will be proactive and aggressive in reducing/preventing training injuries and fatalities.

(1) Each installation will establish standard procedures to ensure that emergency treatment is readily available during training.

(2) TRADOC service schools and major subordinate commands will apply risk management techniques to eliminate or control hazards associated with proponent TSPs IAW guidelines established in TRADOC Regs 350-70 and 385-2. All TSP risk assessments will be reviewed and validated by the safety manager.

(3) Unit commanders will ensure all safety controls identified in the risk management worksheets are implemented prior to the start of training.

(4) The instructor will integrate the appropriate safety/caution statement into each task, and evaluate the performance of the soldiers while they perform the task to the prescribed standard.

(5) All training safety is built on a three-tiered approach (command, leader, individual) to safety.

(a) Tier 1 is commanders' business: validating the structural soundness of the training and evaluation plan for safety, ensuring safety-related matters are addressed, and making risk acceptance decisions.

(b) Tier 2 is first-line leaders' business: considering actions to be taken by responsible individuals, establishing a safety overwatch of training, focusing on

adherence to standards, and making risk acceptance decisions within their commander's intent and delegated authority.

(c) Tier 3 is at the individual level - everyone’s business: ensuring soldiers look after themselves and others, and know how to recognize unsafe conditions and unsafe acts. Soldiers must meet their individual responsibilities for safety, and be able to recognize and report unsafe acts to leaders.

b. Commanders will also ensure that cadre and IET soldiers are aware of the appropriate procedures for reporting suspicious or adverse incidents during non-training hours. Examples would be (but not limited to) actual or suspected instances of fire, theft, altercations, suicide gestures or attempts, injury, unusual health symptoms, or any other unusual behavior or event.

3-25. EXODUS. Headquarters TRADOC will establish and announce the training policy for EXODUS based on annual guidance published by HQDA for the holiday season. The point of contact (POC) for EXODUS is HQ TRADOC, ATTN: ATOM-O. Local commanders will establish policy for soldier conduct while on EXODUS leave.

3-26. Hometown Recruiter Assistance Program (HRAP) execution.

a. The United States Army Recruiting Command established the HRAP as a way for the Army to interface with local communities. In the program, selected graduates return to their hometowns and work with local recruiters to promote and explain the opportunities available in the Army. Additional information on the program is provided at appendix I.

b. The Army National Guard (ARNG) executes its own HRAP as a way for the Army Guard to interface with local communities. Soldiers approved to participate in the ARNG HRAP will report to and be briefed by the ARNG Liaison NCO at each installation. The ARNG Liaison NCO will work with individual state headquarters for coordination. On an annual basis, National Guard Bureau Strength Maintenance Division (NGB-ASM) will provide additional information on the program.

3-27. Nuclear, Biological, and Chemical (NBC) training.

a. Practical NBC exercises will be integrated in bivouac, weapons firing, MOS tasks, and similar training to increase individual proficiency and confidence. The BCT and OSUT POI proponents will include requirements that enable IET soldiers to progress to wearing mission-oriented protective posture (MOPP) IV equipment for at least 4 consecutive hours.

b. Health and safety considerations pertaining to NBC training are contained in FM 3-100, FM 21-10, and TB MED 507. Weather conditions and WBGT readings may affect MOPP IV wear. The soldier's training records will be annotated to show the number of hours of continuous wear of MOPP IV equipment. During periods of warm weather, training time on MOPP IV may be reduced. FM 3-4 contains performance degradation data that is helpful in making this determination.

3-28. Advanced Individual Training field training exercise (FTX).
a. Each AIT and OSUT course will include a 72-120 hour, scenario-driven, tactical FTX. The FTX will reinforce previously learned MOS and common soldier tasks/skills in a realistic, tactical environment.

b. The FTX should avoid the introduction of new, testable training, but should focus on the application of MOS technical tasks and reinforce soldier survival skills.

c. Field training exercises should be conducted in an austere field environment under all weather conditions, at night as well as day, to replicate the stress, sounds, and conditions of the battlefield.

d. The FTX will be conducted during the final 4 weeks of training. During the FTX, soldiers will undergo a series of events exposing them to the rigors of duty performance during field operations. The intent of the FTX in AIT is to integrate MOS and combat survival skills into a simulated tactical scenario, and give soldiers the opportunity to demonstrate their newly learned skills under realistic conditions. The FTX will be addressed in a separate module in the POI.

e. Exceptions to FTX requirements must be submitted to HQ TRADOC, ATTN: ATTG-IT for approval by the CG, TRADOC.

3-29. Advanced Individual Training feedback system. Advanced Individual Training commanders and other recipients of soldiers from BCT installations will provide direct feedback to BCT commanders on the quality of the soldiers they receive. Some topics for discussion may include morale on arrival, medical condition, common task proficiency, physical condition, DA Form 5286-R completion, completeness of training records, and possession of TRADOC Pam 600-4.

3-30. Phased testing for BCT.
a. Phased testing, prescribed by the BCT POI, will be administered to all BCT soldiers.

b. The U.S. Army Infantry School is responsible for the design and content of phased tests.

c. Training, particularly unit reinforcement training, will emphasize preparing soldiers to correctly perform BCT tasks.

d. General guidance for the conduct of the testing is as follows:
(1) Tests will be scored on a "GO/NO-GO" basis.
(2) Soldiers receiving a "NO-GO" will be counseled and given remedial training on the task(s) not passed.
(3) Soldiers will be retested on the task(s) for which they received a "NO-GO."
(4) An AAR will be conducted at the completion of training.

3-31. Testing procedures for AIT and the MOS portion of OSUT.
a. Proponents will develop within-course tests (end-of-annex/block/module) for MOS-producing courses according to guidance outlined in TRADOC Reg 350-70. The validity of each task being evaluated and its relevance will be continuously assessed and changed or modified as appropriate.

b. Commanders will ensure soldiers are tested IAW the SEP for the course being presented. Guidelines for development of SEPs are outlined in TRADOC Reg 350-70, Chapter VI-7, Student Performance Measurement/Testing. The SEP informs soldiers, instructors, and other personnel of the course graduation requirements. A copy of the SEP must be explained to each IET student at the beginning of each course and prominently posted on the bulletin board.

c. Within-course tests must provide a fair and accurate evaluation of the soldier's ability to perform the tasks presented to established standards.

d. Hands-on, performance-oriented testing will be the norm throughout TRADOC. If situational-based, open-book reference written tests are used, they must require the student to not only extract data, but also to apply the data to specific situations likely to be encountered on-the-job. Closed-book, knowledge-based written tests should be used only if it is necessary to verify the learner's knowledge as a prerequisite for later performance testing where the knowledge must be used (e.g., as a building block to later tests). All testing should be conducted in an environment that would replicate the soldier's duty position in the unit in so far as safety and environmental considerations will allow and IAW test administration instructions.

e. Each test will have at least two versions. All versions may be used concurrently.

f. Tests will be monitored by quality control personnel reporting to the brigade or ATC commander, as determined by the local commander. Unit cadre personnel must be certified IAW TRADOC Regs 350-70 and 350-18 before they are permitted to participate in the testing process.

g. Tests will be scored on a "GO/NO-GO" basis. The passing ("cutoff") score for making the "GO/NO-GO" determination will be determined during test design and validation, and will be documented within the course Student Evaluation Plan.

h. Counseling will be conducted with each soldier to reinforce strengths on tasks accomplished, and to correct weaknesses on tasks missed.

i. The goal should remain 100 percent performance to standard on all tasks by each soldier. Soldiers who are unable to achieve this goal should be considered for remedial training and re-testing prior to graduation, or reassignment to another company in a follow-on cycle.

j. Remedial training is a joint responsibility of students and trainers. As such, students failing to achieve task/course standards must be provided opportunities to review material, and practice skills prior to undergoing retest. Trainers must provide appropriate remedial assistance as necessary.

k. Re-testing will include all tasks failed.

l. In accordance with the Student Evaluation Plan, IET soldiers who fail an end-of-annex/block/module retest are prohibited from progressing further in the course and should be considered for new start to a follow-on class or elimination.

3-32. New Start program.
a. Initial entry soldiers who demonstrate deficiencies in achieving task standards consistent with their time in training, but maintain the motivation to do so, will be considered for reassignment to another company or battalion. Reassignment should be made to a company in a later cycle (i.e., a succeeding class) where the soldier has the opportunity to repeat the phased training. These reassignments made under the New Start Program are intended to give the motivated soldier an additional opportunity to meet the skill standards and become a productive soldier for the Army. The success of the New Start Program is a direct function of the manner in which the soldier is integrated into the new unit.

b. Initial entry soldiers who have missed training due to emergency leave or hospitalization and will not be able to complete their training with their current unit, will be considered for reassignment to a company in the appropriate week of training.

c. Initial entry soldiers may be reassigned under the New Start Program at any point in the training cycle based upon the recommendation of the chain-of-command and approval of the battalion commander. Following the approval to reassign the soldier under the New Start Program, the soldier will be moved to the new company or battalion for further training NLT the following duty day.

d. Commanders will not remove soldiers being considered for new start from training until the decision is made. Initial entry soldiers will not be used as detail soldiers during the new start process. The goal is to get the soldiers back into training within 1 day of the decision to restart them. While there are case-by-case exceptions, the decision during IET is authorized as follows:

(1) When a soldier's performance is unsatisfactory in a certain area, the soldier will be given intensive remedial training and retested in that area. If performance remains unsatisfactory after remedial training and retesting, the soldier may be reassigned to another company or battalion in a follow-on cycle.

(2) New starts for academic retraining to complete AIT/OSUT will be granted IAW AR 612-201.

(3) Individuals who are unable to complete MOS training will be processed IAW AR 612-201.

e. Additional information on MOS retraining/ reclassification procedures is provided at appendix J.

3-33. Remedial training.
a. Soldiers unable to attain training standards will be provided remedial training to enable them to remain in cycle, rather than be given a new start in a follow-on cycle.

b. Soldiers who have not passed an APFT prior to graduation may be retained in the fitness training unit (FTU), or similar holding unit, for remedial training; however, they will continue to be reported as holds in ATRRS using REASON CODE "B: Physical Fitness (Remedial Tng-APFT)."

c. In keeping with the TRADOC investment strategy, a soldier will continue to receive remedial training so long as the chain-of-command determines the soldier has the mental and physical capacity to succeed.

3-34. MOS retraining/reclassification policy.
a. The TRADOC IET retraining policy is as follows:
(1) A soldier unable to qualify for a MOS after the first training assignment may be considered for retention in the Army and qualify for additional skill training in a second MOS only if:
(a) In the judgment of the commander, the soldier possesses those qualities which are considered exceptional; and
(b) The soldier demonstrates the motivation and potential to successfully complete the second MOS training.
(2) In all other cases, soldiers who do not meet academic standards will be properly counseled and processed for separation IAW AR 635-200.

b. This policy was established to enhance efficiency, productivity, and morale in both the training base and the units to which MOSQ soldiers are ultimately assigned. It is designed to allow IET cadre to concentrate on trainable soldiers and to reduce workload associated with IET soldiers whose attitude and performance create an unwarranted administrative burden. The objective is to eliminate disruptive, less productive IET soldiers who have an adverse impact on unit esprit and the training environment.

c. Commanders should use all available assets in handling disruptive and nonproductive soldiers. Unit Ministry Team (UMT) support is provided in each IET battalion. These, along with installation law enforcement and medical personnel, are valuable assets trained to assist IET soldiers, cadre, and senior leadership in resolving problems, and should be used as appropriate.

d. Battalion commanders will determine whether soldiers who are unable to achieve MOS graduation requirements merit a second opportunity, or they should be processed for elimination from the Army. Additional guidance on retraining/reclassification procedures is provided at appendix J.

3-35. Separations.
a. Attainment of Army standards is the gauge for successful completion of IET. New soldiers are to be given reasonable opportunities to demonstrate their potential for continued service. Commanders will exhaust retraining and counseling procedures before making a determination that a soldier's performance and potential worth to the Army justifies a new start or separation from the service. Commanders will not begin any separation actions against a RC soldier prior to the local ARNG/United States Army Reserve (USAR) liaison personnel counseling the soldier.

b. No soldier can be released from training and processed for separation without the approval of the battalion commander. Upon approval, the soldier will be removed from the platoon environment and a separation action processed immediately. Once the proper authority approves the separation packet, the discharged soldier should be out-processed within 3 working days. These soldiers will be reported in ATRRS in a hold status using REASON CODE "T: Trainee Discharge Program."

c. Soldiers in BCT/OSUT (to include soldiers who were assigned to the FTU for 1 to 4 weeks) normally will not be separated for reasons of lack of motivation or aptitude prior to completion of their second week of training. Time spent in the FTU will not be counted toward those 2 weeks. This will provide new soldiers a fair adjustment period, and allows the command an opportunity to evaluate and counsel the soldier. However, commanders will ensure that highly disruptive soldiers are removed from the platoon environment, and the appropriate administrative or disciplinary actions are taken.

3-36. Conscientious objectors.
a. Policy and procedures for processing conscientious objectors is provided in AR 600-43. Soldiers who have submitted applications will be retained in their unit and assigned duties providing minimum practicable conflict with their asserted beliefs, pending final decision on their applications. They will not be required to train in the study, use, or handling of arms or weapons.

b. The soldier is not precluded from taking part in those aspects of training that do not involve the bearing or use of arms, weapons, or munitions. Except for this restriction, conscientious objector applicants are subject to all military orders, discipline, and regulations to include those on training.

3-37. Inspector General (IG) system briefing. Commanders' orientations in BCT/OSUT and AIT units will include a briefing on the IG system. Specifically, this briefing must cover the role of the IG, their function, how soldiers can get appointments to see the IG, and how the IG might help the soldier with a problem.

3-38. Suicide prevention.
a. Commanders' and UMTs' orientations in IET units will include instruction on suicide awareness/identification. Instruction to soldiers will include the appropriate actions to take in the event a fellow soldier talks to them about suicide; specifically, soldiers must

recognize the need to immediately notify the first cadre member available in the chain-of-command.

b. Commanders must comply with the provisions of DOD Directive 6490.1, Mental Health Evaluations of Members of the Armed Forces, before sending soldiers for mental health evaluations. Commanders and cadre must be familiar with this directive to avoid violations of legal statute and public law. Commanders must counsel soldiers reported to have discussed or alluded to suicide. The commander will ensure soldiers in emergency/urgent situations are immediately referred to mental health personnel for counseling and evaluation, and accompanied by a NCO to the appointment until the mental health professional assume control. At no time will soldiers in this category be left alone or unsupervised. Escorts for subsequent appointments are not required to be a NCO. Individuals in routine (non-emergency) situations will be counseled IAW DOD Directive 6490.1 prior to referral/meeting with mental health professionals.

c. Commanders must counsel soldiers who are reported to have discussed or alluded to suicide. The commander will refer any soldiers suspected of contemplating suicide to mental health personnel for evaluation and counseling. The commander will provide an escort of greater rank than the soldier, but at least a NCO, to accompany the soldier until mental health personnel assume control. At no time will the soldier be left alone and unsupervised.

3-39. Retraining and holding units (RHUs).

a. Basic Combat Training/One Station Unit Training installations will establish company-size RHUs to perform two functions:

(1) Process soldiers pending discharge. Retraining and holding units will process IET soldiers identified by the chain-of-command for discharge from the Army under provisions pertaining to administrative entry-level separation.

(2) Retrain selected IET soldiers. Retraining and holding units will provide special training to selected IET soldiers who have the potential to complete training with additional time/assistance.

b. Soldiers in each category will be managed and housed in separate groups.

c. All Reserve Component service members will receive counseling from the Reserve Component Liaison Office prior to assignment to the RHU.

Tab 39

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Standard 39 Reference Excerpts

TR 350-18, para 3-6, Reclassification training.
(2)All tasks in the approved POI must be taught. In circumstances that preclude a task being taught to published standards, an exception to policy letter must be obtained from the training/TD (task) proponent prior to conduct of training. The TASS training battalion will prepare and distribute a DA Form 1059 (IAW guidance in AR 623-1), DA Form 5286-R, and DA Form 5286-1-R for each student who completes a reclassification course. Copies of these forms for local reproduction are located at the back of AR 351-1 (AR 351-1 will be superseded by AR 350-1) and this regulation. DA Form 5286-1-R will be overprinted to include all POI tasks, and the TASS training battalion will annotate the student's performance (go/no-go/pass/fail/not taught) on each task. A copy of the forms will be provided directly to the student's unit commander and a copy will be retained at the TASS training battalion IAW
AR 25-400-2.

TR 350-18, para 3-29.

3-29. Student evaluations.

a. Instructors/facilitators will measure student performance IAW TRADOC Reg 350-70, chap VI-7, and TD (task) proponent-provided student evaluation plans and tests.

(1) Instructors will conduct developmental counseling IAW FM 22-100.

(2) Designated instructors will consolidate and analyze each student's performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commander. Evaluators will provide students documented feedback at completion of each evaluation or test. Course manager/senior instructors or other school personnel knowledgeable of course requirements will counsel students on consequences for failure on evaluations, IAW course management and student evaluation plans. Evaluators will use results to determine ratings for AER and course academic records and reports.

TR 350-18, para 3-30.

3-30. Academic evaluation report. The TASS battalions (except OCS) will prepare a DA Form 1059 for each student upon successful completion or disenrollment from the course or phase, IAW AR 623-1.

AR 623-1, para 1-13, Referred reports.
a. The following types of reports will be referred to the student by the reviewing official for acknowledgment and comment.
1. Any report with the following ratings:
a. A "NO" response.

b. An "UNSAT" rating.
c. A "marginally achieved course standards" response.
d. A "Failed to achieve course standards" response. If this block in item 13 is checked, the preparing official should address in item 16, Comments, whether the deficiency reflects on the character/behavior of the student or lack of aptitude in certain areas.

2. Any report with comments that in the opinion of the reviewing official are so derogatory that the report may have an adverse impact on the student's career.

3. Any report with an entry of "FAIL" for the Army Physical Fitness Test (APFT) or "NO" for height and weight indicating noncompliance with AR 600-9.

b. Item 13 will be left blank on AERs for students released from a course of instruction or degree program through no fault of their own (e.g., medical, compassionate reasons), approved retirement, or resignation from the service and the report need not be referred; however, the circumstances must be fully explained in item 16, Comments (DA Form 1059), or item 14 (DA Form 1059-1).

c. After signing a referred report, the reviewing official will forward the report to the student, via a memorandum, f or acknowledgment and comment. The reviewer will ensure that the provisions of this regulation have been followed. The student will acknowledge receipt of the referred report and may enclose a comment or statement if he or she feels that the rating or remarks are incorrect. The student's statement must be factual. The referral memorandum and acknowledgment are forwarded with the report.

1. Comments or statements by the student do not constitute an appeal. Appeals are filed and processed separately as outlined in AR 623-105 for officers, and AR 623-205 for enlisted personnel.

2. If the student has departed the school under circumstances that preclude immediate referral of a report to him or her, forward a copy by certified return mail directly to the student marked "Personal in Nature," or send a copy to the student's commander for acknowledgment and comment. If the enlisted student fails to acknowledge receipt of the report in the time period specified (a reasonable suspense period), the certified mail number will constitute acknowledgment.

AR 623-1, para 1-14, Commandant inquiry.

a. A school commandant/head official will make an inquiry when it is brought to his or her attention that a report may be:

1. Illegal.
2. Unjust.
3. Otherwise in violation of this regulation.

b. In making such an inquiry the commandant/head official will adhere to the procedures outlined in AR 623-105, paragraph 5-30 and AR 623-205, paragraph 2-18.

AR 623-1, para 2-2, Disposition of academic reports.
Academic reports will be forwarded and filed as follows:
a. For Active Army officers and warrant officers:

1. Original: Send to Commander, PERSCOM, ATT- TAPC-MSE-R, Alexandria, VA 22332-0445, within 60 days after course completion. In the upper right corner, indicate the AUTOVON number and extension of the office responsible for preparing the report.

2. One copy—Give to the rated officer after it is processed locally. If the rated officer has departed, mail to his or her forwarding address, or retain the copy until an address is obtained. If an address is not obtained within 120 days, the copy will be destroyed.

3. One copy—

a. For ROTC commissioned officers graduating from officer basic course (OBC), send to Commander of the ROTC Region responsible for the school from which the individuals was commissioned. See AR 145-1, appendix B, for region jurisdiction over commissioning institutions.

b. Send to the superintendent, U.S. Military Academy (USMA), for Academy graduates of branch school basic courses.

c. Send to Commandant, U.S. Army infantry School ATTN: ATSH-TP-B5, Ft. Benning, GA 31905-5500 for Branch Immaterial Officer Candidate Course graduates for branch school basic courses.

d. For students whose Reserve appointments are terminated under AR 635-100, chapter 3, section III, add to the Professor of Military Science copy, the year graduated, date, and reason
the Reserve appointment and active duty were terminated.

b. For active duty Army enlisted personnel:

1. Original—

a. For all TDY and PCS courses of less than 20 weeks an for PVT through CPL AERs send to Commander, U.S. Arm Enlisted Records and Evaluation Center, ATTN: PCRE-FS Fort Benjamin Harrison, IN 46249-5301, within 60 days after completion of course.

b. For PCS courses of 20 weeks or more for SGT through CSM send to Commander, U.S. Army Enlisted Records an Evaluation Center, ATTN: PCRE-RE, Fort Benjamin Harrison, IN 46249-5301, within 60 days after completion of course.

2. One copy—Send to PERSCOM, ATTN: TAPC-(appropriate career branch), Alexandria, VA 22331-0400 for SSG through SGM/CSM personnel and for personnel listed in AR 614-200, table 1-1, within 60 days after completion of the course. In the upper right corner, indicate the AUTOVON number and extension of the office responsible for preparing the report.

3. One copy—Send to PERSCOM, ATTN: TAPC-EPZ E, Alexandria, VA 22331{0400, for Sergeants Major Academy graduates.

4. One copy—File in the DA Form 201 (Military Personnel Records Jacket, U.S. Army) (MPRJ) for personnel in grade SGT and below attending primary and basic level NCOES (These reports will be destroyed when the soldier is promoted to SSG.)

5. One copy—Send to unit commander for personnel in the rank of SGT and below attending primary and basic level NCOES.

6. One copy—Give to the rated soldier after it is processed locally. If he or she has departed, mail to his or her forwarding address. If an address is not obtained within 120 days, destroy the copy.

7. One copy—Send to CG, ARPERCEN, ATTN: DARP-SPR-E, 9700 Page Blvd., St. Louis, MO 63132-5200 if soldier is dual component status (holding a USAR commission or warrant status while serving on active duty as Regular Army (RA) (Enlisted). In item number 16 (Remarks Section) type or stamp "Soldier Serving on Dual Component Status."

8. (Rescinded.)

c. ARNG/USAR personnel not on active duty other than to attend the school for which the report was rendered. Send in accordance with paragraph 2-7.

d. U.S. Marine Corps (officer and enlisted) personnel attending resident Army service schools. Two copies of DA Form 1059--Prepare and send to the HQ, U.S. Marine Corps, CMC (MMPE-2), Quantico, VA 22134-0001.

e. U.S.Navy personnel attending resident Army Service Schools.

1. *For U.S. Navy enlisted personnel attending resident Army schools* Refer to Bureau of Naval Personnel Instruction (BUPERS) 1616.9 of May 1991, chapters 4 and 6 for students under instruction. Forward appropriate performance documentation to the student's next command. Contact the Enlisted Evaluations Branch (Pers-322), Washington D.C. 20370-5323, AUTOVON 224-1029/1066 or commercial: (703) 614-1029/ 1066 for more information.

2. *For U.S. Navy officer personnel attending resident Army schools* Refer to BUPERS 1611.1A of 26 March 1990, chapter 8 for students under instruction. Forward appropriate performance documentation to the student's next command. Contact the Officer Fitness Branch (Pers-323), Washington D.C. 20370-5323, AUTOVON: 224-1196/2476 or commercial: (703) 614-1196/2476 for more information.

f. U.S. Air Force officers attending Army service school resident courses. Four copies of Air Force Form 475 (Education/Training Report)--Prepare according to Air Force Regulation 36-10, chapters 6 and 7, and forward to the Air Force officer's servicing Consolidated Base Personnel Office, ATTN: CBPO/DPMQ. Academic reports are not required for enlisted airmen.

AR 623-1, para 2-5, Special instructions for preparing DA Form 1059 for Reserve Component personnel.

a. (Rescinded.)

b. If the student has been attached to the USAR school or training division/brigade for IDT as well as for ADT, complete item 11 according to instructions in section III of this chapter. The following additional entries will be made in item 16.

1. The mailing address of the State AG (for ARNG students).
2. Area commander or CG, U.S. Army Reserve Personnel Center (for USAR students).
3. The student's ARNG or USAR unit or USAR control group of assignment orders as shown on the attachment orders or enrollment application.

c. If the student is assigned to a RC troop program unit, the duplicate DA Form 1059 will be forwarded to the soldier's unit commander.

AR 623-1, para 2-7, Disposition of reports.
Academic reports prepared for ARNG and USAR personnel on ADT or IDT will be processed and forwarded as indicated in a and b below. A copy of the report will be furnished to the students.

a. *ARNG students.*
1. *Officers.* The original will be sent to the Army National Guard Personnel Center, ATTN: NGB-ARP-CA, 4501 Ford Ave., Alexandria, VA 22302-1450. One copy will be sent to the State AG. For ARNG officers completing OBC who were commissioned from Reserve Officer's Training Corps (ROTC), an additional copy will also be sent to the commissioning ROTC Region headquarters utilizing the procedures outlined in paragraph 2-2a(3)(a).
2. Enlisted personnel. Send the original and one copy to the appropriate State AG.

b. USAR students.
1. For officer and warrant officer students assigned to USAR troop program units, the school commandant will forward the academic report to Commander, *ARPERCEN, ATTN: DARP-PRE, 9700 Page Boulevard, St. Louis, MO 63132-5200.*
2. For enlisted students assigned to USAR troop program units, the school commandant will forward—
a. The original of the AER to Commander, ARPERCEN, (l) above.
b. A copy to the appropriate unit commander for inclusion in the member's MPRJ.
3. For officer and enlisted members of the Individual Ready Reserve (IRR), USAR and AGR, the school commandant will forward two copies of the AER along with the member's MPRJ (if available) to Commander, ARPERCEN, (l) above.

AR 623-1, para 2-8, Completion instructions for DA Form 1059.
Item 1. *Name. Last name, first name, middle initial, and any suffixes.*

Item 2. *SSN. Ensure numbers are entered correctly with hyphens.*

Item 3. *Grade. Use 3-character code (AR 680-29). Examples: SGT, MSG, CW2, CPT, COL.*

Item 4. *Branch Use 2-character code (AR 680-29) reflecting basic branch for commissioned officers or management group for warrant officers as shown in item 11, DA Form 2B (Personnel Qualification Record. Part I—Warrant Officer). Leave blank for enlisted soldiers.*

Item 5. *AOC/MOSC. Enter the AOC codes for commissioned officers (example 12/54), see AR 611-101. For warrant officers and enlisted personnel enter the individual's Primary MOS (See Section II, Item 8, DA Form 28 or Section II: item 4, DA Form 2A (Personnel Qualification Record. Part I—Enlisted): AR 611-112 and AR 611-201.*

Item 6. *Course title. Include class number and year. For resident officer career development course, indicate in the space provided the military education code as follows:*

OFF Basic 7
OFF Advance 6
SWO Training B
MWO Training A
All other courses do not require coding.

Item 7. *Name of school, U/C. Self-explanatory.*

Item 8. *Component-Enter RA, ARNG, or USAR.*

Item 9. *Type of report. If resident is checked, an entry in item 10 is required; for nonresident courses, items 10, 11 and 12 will be blank.*

Item 10. *Period of report. Enter the beginning and ending dates of the report: Year, month, day (e.g., 79 01 15). The "From" date in "Period of Report" is the day following the last day of the officer's last OER or AER. For enlisted personnel the "From" date is the date assigned to school. The "Thru" date is the day of departure from the school. For officers, explain in item 12, any difference of 90 calendar days or more between the entry in the "From" date in the "Period of report" and the "From" date in the "Duration of course" (item 11). Give inclusive dates: Year, month, day (e.g., 79 03 15). If additional space is required, use item 16. For nonresident academic evaluation reports, the "From" and "Thr*u" dates are not applicable. PSCs will complete DA Form 2-1, items 6, 17, and 35 in accordance with AR 640-2-1. Either the course completion certificate or DA Form 1059 may be used as the substantiating document for recording this entry.

Item 11. *Duration of course. The "From date" is the first day of the course and the "Thru date" is the date of graduation.*

Item 12. *Explanation of nonrated periods. See item 10 above, AR 640-2-1, AR 623-105, and AR 623-205.*

Item 13. *Performance summary.*

a. This item must be completed for all officer and enlisted courses except for students released from a course for no fault of their own, approved retirement, or resignation from the service, which will be explained in item 16. It is intended to measure the level of performance of each student against the course standards. Identify each student's level of performance by placing an "X" beside the most appropriate entry as described below:

1. "Exceeded course standards" for those students whose overall course achievement is significantly above the standards of the course. The category is restricted to those students who are considered deserving by the commandant but will not exceed 20 percent of the class enrollment.

2. "Achieved course standards"—For those students who achieved the overall acceptable course standards.

3. "Marginally achieved course standards" For those students who achieved with difficulty, the minimum acceptable course standards as identified in the course grading plan.

4. "Failed to achieve course standards" Self-explanatory.

b. Comments where required, ((1), (3), and (4) above) must be in detail to justify the level of performance indicated. Use item 16 for supporting comments. Overstamping with "Distinguished Graduate," "Honor Graduate," "Commandant's List," or any other overstamping or highlighting is prohibited.

c. If MARGINALLY ACHIEVED or FAILED TO Achieve is checked see paragraph 1-13.

***Item 14.** Demonstrated abilities.*

a. This item must be completed for all officer and enlisted courses. Indicate the level of performance by placing an "X" beside the appropriate entry as described below:

1. A "superior" rating indicates the student has demonstrated an ability that is significantly above the standard.

2. A "satisfactory" rating indicates the student has demonstrated an acceptable level of proficiency.

3. "Unsatisfactory" rating-Self-explanatory.

4. "Not evaluated" rating-Self-explanatory.

b. Comments, where required ((1) and (3) above), must be in detail to justify the level of proficiency indicated. Use item 16 for supporting comments. If UNSAT is checked see paragraph 1-13.

***Item 15.** Academic potential.*

a. Indicate the student's potential for selection to the next higher level of schooling/training. If NO is checked see paragraph 1-13. This pertains to the normal career progression/professional development courses:

1. Commissioned officers; advanced, CGSC, and Senior Service College.

2. Warrant officers; Master Warrant Officer Training.

3. Enlisted personnel; basic, advanced, and Sergeants Major Course.

b. The evaluation should assess the student's

1. Ability to apply the knowledge derived from the school.

2. Potential compared to students with similar experiences and motivation.

3. Ability to contribute to group discussions.

***Item 16.** Comments.*

a. Comments are required concerning the capabilities, potential, or limitations of the student to include achievements and awards. Explain entries requiring further description and enter additional comments.

b. In particular, comments should be made if the student—

1. Displayed exceptional potential; demonstrated any exceptional capabilities, aptitudes, or limitations which should be considered in future selection/assignments.

2. Lacked ability or motivation.

3. Demonstrated moral or character deficiencies.

4. Failed to respond to recommendations for improving academic or personal affairs.

5. Was released from student status through no fault of his own (e.g., medical, compassionate) and is recommended for reinstatement in the course.

6. Was released from student status based on an approved retirement or resignation.

7. Was required to appear before an academic board.

8. Is on dual component status (see para 2-2b(7)).

c. If appropriate, comments should also be made if the student has demonstrated the potential to be a service school instructor.

d. For resident reports on U.S. Army personnel attending schools that are 56 days or longer in duration and all NCOES courses regardless of length, the preparing officer will enter the student's verified height and weight data at the bottom right-hand side of the "Comments" section (typed). Also the word "YES" or '.'NO" will be added after the height and weight data to indicate the student's compliance with the height and weight standards contained in AR 600-9. Enlisted personnel in initial training, such as BT, AIT or one station unit training (OSUT), are not subject to the provisions of AR 600-9 until completion of the courses, or until completion of 6 months on active duty whichever occurs first. They fall under the initial procurement weight standards in AR 40-501. Example entries are "72/185 YES" or "68/ .205 NO". Height and weight data will be as of the "thru" date of the report. Comments are mandatory for height and weight entries that contain a "NO" or when the data are not available for entry on the report. Comments should explain reasons for noncompliance, note any medical exception to weight control requirements; and indicate progress or lack of progress in a weight control program. If "NO" is entered see paragraph 1-13. A student who exceeds the weight for height screening table may receive a "YES" only after a body fat measurement has been completed and he or she is found to be within the body fat standard. Comments are required for those students who exceed the weight for height screening table but

receive a "YES" entry. For pregnant students, the preparing officer will enter the following: "Exempt from weight control standards of AR 600-9."
1. The "YES/NO" will not be recorded for those students who exceed I the weight for height screening table (AR 600-9, app A) but have not I completed the body fat medical examination (AR 40-501). However, the preparing officer must explain the circumstances in item 16, Comments.

e. For resident reports on U.S. Army personnel attending schools that are 56 days or longer in duration and all NCOES courses regardless of length, immediately before the height and weight entry, the preparing officer will enter (typed) one of the following APFT entries: "PASS", "FAIL", or "PROFILE" and the year and month of the most recent APFT administered within 12 months of the thru date of the report or, when "PROFILE" is entered, the date the profile was awarded. Sample entries are: "PASS 8206", "FAIL 8206", or "PROFILE 8209". APFT numerical scores will not be entered. Comments are mandatory for APFT entries of "FAIL" or "PROFILE". Comments on a "FAIL" entry should explain the reasons for failure and note any progress toward meeting physical fitness standards (AR 350-15). If "FAIL" is entered see paragraph 1-13. If the APFT has not been taken within 12 months of the report "thru" date, the APFT data entry will be left blank. For students who have not taken the APFT within 12 months of the through date of the report due to pregnancy, convalescent leave, etc., the preparing officer will enter the following: 'Exempt from APFT requirement IAW AR 40-501."

f. For students in Senior Warrant Officer Training Courses, enter as appropriate: "Officer (is) (is not) determined to be tactically and technically certified to serve as a Senior Warrant Officer in MOS9. For students in Master Warrant Officer training courses, enter as appropriate: "Officer (is) (is not) determined to be tactically and technically certified to serve as a Master Warrant Officer in MOS

***Item 17.** Authentication. This block will be prepared and signed by faculty advisors and evaluation advisors. The report must be signed by the preparing officer. The commandant or an authorized representative will review and sign the report.*

***Item 18.** The Service School/NCO academy commandant will—*
a. Enter the student's forwarding address if he or she has departed before receiving a copy of the completed report. (A unit address should be used only when no other forwarding address is available.)

b. Ensure that a copy of DA Form 1059 has been given or mailed to the student. The appropriate entry will be checked and dated. If it is impossible to give or mail a copy of the completed report to the student (for example, absence of a valid forwarding address), retain the student's copy for 120 days. If during the 120 days a request has not been received from the student for the completed report, it will be destroyed. Enter the appropriate PSC code in item 18b prior to sending the report to HQDA.

c. Ensure that a copy DA Form 1059 is given or mailed to the unit commander of soldiers in grades SGT and below who are attending primary and basic level NCOESd. Ensure that a copy of the report is sent for filing in the student's OMPF.

d. Ensure that a copy of the report on dual component personnel is forwarded in accordance with paragraph 2-2b(7).

AR 351-1, para 5-27(d), Recognition of Students.
d. DA Form 1059 will be completed for students in accord with AR 623-1.

AR 351-1, para 5-30c(4). *Individuals eliminated for disciplinary reasons, lack of motivation, or failure to master tasks at sufficient speed to meet course training objectives will have the matter recorded on their DA Form 1059 under AR 623-1.*

a. Soldiers eliminated for cause may, by appropriate authority, be removed from the Army standing promotion list, barred from reenlistment, receive non-judicial punishment, or be reclassified.

b. Soldiers eliminated from USASMC for other cogent reasons will not be eligible for reentry into the course.

c. Soldiers eliminated from ANCOC for other than academic reasons may request reenrollment after a period of 1 year. Requests will be routed through command channels to Commander, MILPERCEN (DAPC-EPT-FN) 2461 Eisenhower Ave, ALEX VA 22331-0400. The immediate commanders must specifically recommend approval or disapproval and indicate reasons for their recommendation. Commanders in the grade of LTC or above may disapprove requests without forwarding the case to a higher level of command.

d. Soldiers eliminated from PLDC and BNCOC for other than academic reasons will not be eligible for further NCOES training for a period of 6 months.

e. A student eliminated for academic deficiency from NCOES courses (other than the USASMC), may re-enter the course when both the unit commander and the school commandant determine that the student is prepared to successfully complete the course. For those courses where scheduling is accomplished by MILPERCEN, the school commandant will notify the appropriate career management branch of the recommendation that the soldier be rescheduled for training.

f. Personnel eliminated from NCOES courses (PLDC/BNCOC) who are allowed to attend a second time must start at the beginning of the course upon reenrollment.

g. Students who fail to meet established HQ TRADOC test standards through three separate evaluations (i.e., original test and two retests), each followed by reinforcement

training, and reviewed by the NCOA commandant, will be dismissed from training for academic deficiency. These soldiers may be considered by their chain of command for reclassification or retraining in another MOS.

h. Soldiers who pass a retest will be given credit for passing at the minimum HQ TRADOC established passing score regardless of the actual retest grade.

i. Hands-on testing is encouraged and should be used as often as practical. Proponents will determine the best mix hands-on and other type testing.

j. An end-of-course comprehensive test (EOCCT) will be administered in all BNCOCs and ANCOCs. There is no EOCCT in PLDC or the USASMC.

5. Disenrollment for illness, injury, compassionate transfer, or other reasons beyond the control of the individual will be made without prejudice. The NCOA will provide a written statement to the soldier's unit, stating the reason for termination, and the soldier will be eligible for reenrollment as soon as convenient.

6. ARNG soldiers on full-time training duty (title 32, USC) do not fall under the UCMJ. Appropriate disciplinary action should be taken in coordination with the State adjutant general concerned.

d. Individuals may be removed for cause or substandard performance of duty from ANCOC or USASMC selection lists under the following procedures:

1. Removal action may be initiated by any commander in the individual's chain of command.

2. A removal action must contain a statement that the individual has been—

a. Notified in writing of the proposed action.

b. Informed of the consequences of removal.

c. Afforded a reasonable period of time (generally not less than 5 working days) in which to submit matters in rebuttal.

3. A removal action must be approved by an officer exercising general court martial authority over the individual.

4. Approved removal actions must be electronically reported to MILPERCEN (DAPC-EPT-FN), 2461 Eisenhower Ave, ALEX VA 22331. The following information will be forwarded:

a. Name.

b. Social security number.

c. Date of removal.

d. Brief synopsis of reasons for removal.

TR 350-6, Apx G,Training records.

G-1. Training records provide gaining unit commanders with an official record of the soldier's completed training, and serve as objective departure points for unit training. The IET soldier's training records packet will contain the following:

a. A DA Form 5286-R (Individual Training Record (ITR)) will be initiated and maintained by the soldier's assigned company for every soldier attending IET. The modified DA Form 5286-R in the AIMS-PC database will be used to document the completion of training requirements in all IET. This form streamlines the information required and provides a standardized reporting format for all IET sites. A sample modified DA Form 5286-R is at figure G-1.

b. Enlisted personnel attending MOS producing courses in order to reclassify or reenlist into another MOS, or prior service personnel enlisting IAW paragraph 2-17, will receive a DA Form 1059 (Service School Academic Evaluation Report) upon completion of their course, regardless of course length.

c. A DA Form 705 (Army Physical Fitness Test Scorecard) will be included in the training records packet.

G-2. Installations must ensure that out-processing is IAW AR 612-201. Losing units will ensure completed training forms are given to each soldier to hand-carry to their next training site or first unit of assignment using DA Form 5287, Training Record Transmittal Jacket. Active Component soldiers will not depart IET without training records. Commanders must instill in their soldiers the importance of safely hand-carrying these records to their next duty station. In accordance with AR 635-200, RC soldiers' training records will be sent to the appropriate TSAG's Office or supporting USAR Command upon completion of training.

G-3. Due to the increasing problem of identity theft, commanders must ensure that critical personal identification information is not included on the outside of the records packet envelope. Packets need to be marked in order to identify the content's owner, but complete names and social security numbers should not be placed on the outside of the envelope. Development of proper records identification systems will be at the commander's discretion.

TR 350-10, para 2-7g(4).

2-7. Conduct of training. Commandants will ensure training is conducted and evaluated per the principles listed in Field Manual (FM) 25-100 in conjunction with FM 25-101 (Note: both manuals to be revised as new "3" series FM publications). Noncommissioned Officer Academy commandants will use the training schedule format outlined in FM 25-101.

a. Prior to enrollment, students must be fully capable of performing supporting individual tasks and the tasks required in the next lower level course. Commandants may evaluate student capabilities through appropriate testing, and if necessary, provide remedial training, recycle to a later class, or return to unit of assignment those students who do not meet course prerequisites or do not have the required minimum skills. Remedial

training will be scheduled when applicable on the training schedule, but will not be conducted during normal POI time.

b. Schools will train tasks only at the skill level prescribed for each course.

c. Student training, SGL, SSGL and instructors.

(1) School staffs, faculties, SSGL, and training departments will supervise and support SGL, instructors, and students, and ensure commitment to training, educating, and developing each student.

(2) Trained, qualified, certified, and experienced SGL, SSGL, and instructors will conduct and supervise student training (SSGLs may be used as SGLs as the NCOA commandant deems necessary to accomplish the training mission or as temporary fill-ins when shortages of by-grade SGLs dictate the need to do so). Small group leader-to-student ratios will be sufficient to ensure student control and supervision and facilitate teaching, coaching, mentoring, and developing individual student leadership skills to the level for which training is provided. (See paragraph 2-13.)

(3) Small group leaders, SSGLs, and instructors will provide students with progressive and sequential training, accurate evaluations, and timely feedback via task performance after action reviews.

(4) When applicable, SGLs, SSGLs, and instructors will use mission orders to convey training objectives. Mission orders will clearly articulate the commander’s intent. Small group leaders, SSGLs, and instructors will ensure students use mission orders to demonstrate a thorough understanding of the mission and the commander’s intent.

d. Training environments must enhance learning, encourage student initiative, require students to attain and sustain high levels of discipline, have defined, publicized, and enforced standards, and focus on preparing the student to lead soldiers through training, maintenance, deployment, and sustained tactical operations in support of unit missions.

e. When possible, students will be given opportunities to gain experience by leading and/or training soldiers in other courses (for example, conduct marksmanship and physical fitness or CTT training for advanced individual training students).

f. Commandants will use proponent-developed end-of-course (Phase II) CPX, FTX, STX, or LTX, virtual or live, in the field or at a job site, as a culminating event designed to evaluate (Go/No-Go) the soldier’s ability to perform the terminal learning objectives of the course to graduate. These events will be at least 72 hours in length, be scenario driven and conducted under CONOPS conditions. Leader development course proponents will publish minimum guidelines and evaluation criteria for exercise execution in the course management plan of each course they develop.

g. Student evaluations. Small group leaders and instructors will—

(1) Determine if the student has demonstrated a sufficient level of competency to pass the course IAW the student evaluation plan as prescribed in TRADOC Reg 350-70.

(2) Conduct developmental counseling to provide students information on their strengths and weaknesses, and courses of action to improve performance.

(3) Consolidate and analyze student performance evaluations near the end of the course and at intervals appropriate to course length as determined by the commandant/Course Management Plan (CMP). Small group leaders, SSGLs, and instructors will provide students documented feedback and will use analysis results to determine ratings for completing DA Form 1059 (Service School Academic Evaluation Report (AER)) and course academic records and reports. Records and reports must adequately support appropriate administrative action for students who fail to meet course requirements.

(4) Complete an AER (DA Form 1059) for all students per AR 623-1. Whenever possible, students should receive a copy of their completed AER at graduation. However, although Army policy allows for completion within 60 days after graduation, at a minimum, students will be provided an opportunity to review their draft AER prior to departure. Written comments in block 16 will be tailored for each individual.

h. Training material. Sufficient quantities of the most current training products will be maintained for each class.

(1) Training support package and examination material.

(2) Lesson reference files and course changes.

(3) All training aids and devices referenced in the current lesson plans.

(4) Student issue materials including advance sheets, supplemental readings, compact discs, student handouts, reference books, practical exercises, and solution sheets.

(5) At least one visitor folder will be available in each classroom. See TRADOC Reg 350-18 for visitor's folder contents.

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Standerd 40 Reference Excerpts

AR 600-20, para 6-2g(11), Commanders at all levels.
(11) Publish and post separate, written command policy statements for EO, the prevention of sexual harassment, and equal opportunity complaint procedures. All statements will be consistent with Army policy. Statements must include an overview of the command's commitment to the EO program and reaffirm that unlawful discrimination and sexual harassment will not be practiced, condoned, or tolerated. The policy statements will explain how and where to file complaints. Additionally, the statements shall include complainant's protection from acts or threats of reprisal. These statements are required for each MACOM, installation, separate unit, agency, and activity down to company/troop/battery or equivalent level. For more information on sexual harassment policy statements, see para 7-2b.

AR 600-20, para7-2b. Chain Of Command Responsibilities
Commanders and supervisors will-
a. Ensure that assigned personnel are familiar with the Army policy on sexual harassment.

b. Publish and post written command policy statements for the prevention of sexual harassment. All statements will be consistent with Army policy. They will include the local command's commitment to the Army's policy against sexual harassment and will reaffirm that sexual harassment will not be tolerated. The statement will explain how and where to file complaints and shall include the fact that all complainants will be protected from acts or threats of reprisal. Each MACOM, installation, separate unit, agency, and activity down to company, troop or battery level will publish a sexual harassment command policy statement. Units should coordinate these policy statements with the servicing staff judge advocate or legal advisor before publishing them.

c. Continually assess and be aware of the climate of command regarding sexual harassment. Identify problems or potential problems. Take prompt, decisive action to investigate all complaints of sexual harassment. Either resolve the problem at the lowest possible level or, if necessary, take formal disciplinary or administrative action. Do not allow soldiers to be retaliated against for filing complaints. Continually monitor the unit and assess sexual harassment prevention policies and programs at all levels within area of responsibility. Ensure all leaders understand that if they witness or otherwise know of incidents of sexual harassment, they are obligated to act. If they do not, they themselves are also guilty of sexual harassment.

TR 350-18, para 3-2j, Institution SOP.
TASS institutions must develop and maintain a unit SOP, which includes, as a minimum, policy and procedures for:
j. Sexual harassment/equal opportunity (EO).

TR 350-6, para 2-6j.
j. Sexual harassment, fraternization, or unprofessional association are explicitly forbidden IAW AR 600-20 and may violate local installation regulations. Such offenses may be punishable under the UCMJ.

TR 350-6, para 2-12h, table2-2.
Soldierization and reinforcement training in AIT/OSUT.
h. In courses greater than 23 weeks in length, commanders have the discretion to modify or adjust the number of subjects taught in the additional quarterly reinforcement training sessions if course completion will occur prior to the end of a full quarter. When determining which subjects should be taught, the commander should base the decision on the number of training weeks included in that quarterly period, and on the particular subjects he/she believes need to be reinforced with his/her soldiers.

Table 2-2
Reinforcement training

Subjects/Hours	IET Weeks 10-17	IET Weeks 18-32	IET Weeks 33-completion
Museums (Branch related)/**2 hours**	**X**		
Branch History/**1 hour**	**X**		
Army Core Values/**1 hour**	**X**	**X**	**Quarterly**
Equal Opportunity (EO)/Prevention of Sexual Harassment (POSH)/4 hours		**X**	**Quarterly**
Comply with Uniform Code of Military Justice (UCMJ)/**1 hour**		**X**	**Quarterly**
Spiritual/Emotional/ Mental Fitness/**1 hour**		**X**	**Quarterly**
Serve as a Member of a Team/**3 hours**		**X**	**Quarterly**
Manage Personal Finances/**2 hours**		**X**	
Rape Prevention/**1 hour**		**X**	

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Standard 41 Reference Excerpts

TR 350-10, para 2-4.

2-4. Student orientation. Commandants and/or TASS training commanders will post their student orientation information under their respective school codes to the school header (SH) screen in ATRRS. Information will be kept current at all times. Units and students may now access the student orientation material on the ATRRS homepage. (Note: DA Pam 351-4 is no longer current in many cases). If ATRRS access is not available, student information will be mailed to the student's unit no later than (NLT) 45 days prior to the course start date. Student orientation materials will be provided attendees in sufficient time to acquire materials and items required to bring to school when reporting for training. These materials should also be available on the school web site. Upon arrival, commandants will conduct a formal orientation with each class during in-processing. This orientation must include—

a. Course scope/overview and enrollment prerequisites.

b. An explanation of the student's course evaluation plan they will be issued.

c. Providing student orientation materials for students who did not receive their orientation materials prior to arrival.

d. Billeting, mess, financial, and support information.

e. Clothing, equipment, documents, and other items required for course attendance and a listing of prohibited items.

f. Installation and local community information including appropriate e-mail address and telephone numbers.

TR 350-10, para 2-5.

2-5. Billeting. Installation commanders will make every effort to billet students on post. Students not in a temporary duty (TDY) status will not be required to maintain course-related bachelor officer/enlisted quarters for which the student must pay. NCOES billeting priority is PLDC, BNCOC, and ANCOC. Within local constraints—

a. Students attending PLDC will be billeted at the NCOA the entire course in squad-size bays to keep classes, small groups, and squads together as much as possible.

b. Students attending BNCOC will be billeted in two- to four-person rooms with adequate living and study facilities.

c. Students attending ANCOC will be billeted in one or two-person rooms with adequate living and study facilities. If billeting, as prescribed above, is not available, ANCOC students will be billeted in bachelor enlisted quarters, visiting enlisted quarters, or off

post. Note: NCOA commandants may allow locally assigned ANCOC and BNCOC students (those attending who are within a 50 mile radius of their home station) to reside in their local unit or government/civilian quarters as long as all course leadership roles, performance and academic evaluation requirements/standards can be met.

d. Noncommissioned Officer Education System students will not be billeted with soldiers attending AIT. If billeting in the same building with AIT soldiers is unavoidable, access to respective living areas must be restricted.

e. Adherence to above policy will be reviewed during accreditation visits. Noncompliance will be noted in the initial Quality Assurance (QA) program accreditation report as a higher headquarters issue and documented on the next visit's report as a critical deficiency, if conditions have not improved and no plan has been initiated by the organization to upgrade facilities to meet minimum standards.

AR 210-50, para 3-40.

3–40. Authority to occupy Army lodging facilities

a. Personnel authorized to occupy UPH(TDY).

(1) The following personnel may occupy UPH(TDY) and receive confirmed reservations:

(a) TDY military and TDY DOD civilians.

(b) PCS military personnel, with or without family members, or family members alone, when GH or permanent housing is not immediately available.

(c) U.S. and foreign guests of the Military Services, and guests of the Armed Forces as determined by the installation commander. Payment of the service charge is required.

(d) USAR, ARNG, and Reserve Officers Training Corps (ROTC)personnel on ADT, ADSW, or performing AT as individuals and scheduled IDT (para 3-32d).

(e) TDY foreign nationals or foreign military trainees engaged in or sponsored by military assistance or similar training programs.

(f) Military family members on medical TDY orders.

(2) When space is available, the following personnel may occupy UPH(TDY):

(a) RC personnel not otherwise addressed in (1) above(including personnel not under orders, paid retirees, and gray area retirees), active duty retirees, military personnel on leave, military personnel granted permissive TDY, family members and guests of military personnel assigned to the installation if GH space is not available.

(b) Nonmilitary uniformed personnel of the U.S. Public Health Service and the National Oceanic and Atmospheric Administration, foreign military personnel, and U.S. Coast Guard, when authorized by the installation commander.

(3) Personnel eligible for UPH(TDY) on a confirmed reservation basis will compete on an equal basis for UPH(TDY).

(4) Personnel eligible for UPH(TDY) on a space available basis will compete on an equal basis for UPH(TDY).

(5) Soldiers in promotable status may be assigned to housing of the next higher grade upon presentation of proof of pending promotion.

(6) Except for active duty military personnel on leave and retired military personnel, at the discretion of the installation commander, personnel who occupy UPH(TDY) on a space available basis will pay the fair market rental rate. However, RC personnel (not addressed in (2)(a) above), who use UPH(TDY) on a space available basis when GH is not available, may be charged a service charge, instead of a rental rate, if their status is the same as other soldiers paying service charges. (MACOM commander may not grant exceptions.)

b. Personnel authorized to occupy GH facilities.

(1) The following personnel may occupy GH facilities and request a confirmed reservation:

(a) PCS soldiers and their family members or family members alone who are temporarily without permanent housing. (When in PCS status and receiving TLA or TLE, personnel must occupy GH facilities, when available. If GH facilities are not available, the soldier's certification is required to support any voucher. Failure to do so could affect TLA or TLE reimbursement.) (See JFTR, paras U5705-B and U9201-B.)

(b) PCS DOD civilian personnel with or without family members or family members alone who are in overseas and foreign locations and are temporarily without permanent housing.

(c) Families, relatives, and guests of hospitalized soldiers or their families.

(d) Active and retired military personnel and family members undergoing outpatient treatment at a medical facility and who must stay overnight.

(e) Official guests of the installation as determined by the installation commander.

(f) Soldiers or their family members when visiting the installation incident to interment of the soldier or family members.

(2) When space is available, the following personnel may occupy GH facilities:

(a) TDY soldiers and TDY DOD civilian personnel when UPH(TDY)facilities are not available.

(b) All RC personnel (including members not under orders, paid retirees, and gray area retirees), not otherwise addressed in b(1)above.

(c) Active duty retirees with or without family members.

(d) Members of U.S. Coast Guard, Public Health Service, and National Oceanic and Atmospheric Administration.

(e) PCS DOD civilians with or without family members in CONUS.

(f) Soldiers on leave not incident to PCS, with or without family members, family members alone, and relatives and guests of soldiers assigned to the installation.

(3) Personnel eligible for GH on a confirmed reservation basis may compete on an equal basis or the installation commander may establish priorities within the categories listed in (1) above to meet the needs of the installation.

(4) Personnel eligible for GH on a space available basis may compete on an equal basis.

(5) RC personnel shall be accommodated in GH on the same basis as soldiers on active duty. MACOMs shall supplement the GH reservation-eligible list if they determine that space available access does not provide "same basis" accommodations.

c. Medal of Honor (MOH) recipients. MOH recipients of all services are authorized Army lodging facilities at the discretion of the installation commander. Active duty, retired, and discharged (without retirement) MOH recipients may receive priority placement

and confirmed reservations in UPH(TDY), or guest house. A DVQ may be assigned regardless of military pay grade. The established service fee applies.

AR 210-50, para 3-43.

3–43. Assignment to UPH(TDY)

a. Unless otherwise prescribed in this chapter, personnel shall not be required to occupy housing that does not meet adequacy standards except for military necessity.

b. Commanders of training activities may determine that TDY students or trainees must reside on the installation to complete training requirements effectively, regardless of adequacy standards.

c. Exceptions to mandatory assignment to adequate UPH(TDY) for civilian and military personnel will be annotated on the traveler's orders in accord with the JFTR or JTR, as appropriate.

d. Travel orders issuing agencies must ensure that TDY travel to an installation is clearly shown on the orders. Travelers may not cause their orders to indicate TDY at a particular city if their TDY is in fact to an installation. Travelers must contact the ACRC or installation Billeting Office prior to securing off-post hotel or motel lodging to obtain a CNA.

e. The assignment of UPH(TDY) for a specific time to an individual in TDY status will normally be all inclusive. Issuance of CNAs for weekends and holidays is not authorized. However, the traveler is authorized to return home or to the home station and receive payment of travel allowances which cannot exceed the cost of remaining at the TDY location. In this instance, the TDY person will check out of housing and no CNA will be issued. If UPH(TDY) is not available upon return to TDY station, a CNA will be issued.

f. Personnel traveling as a team will be housed in the same or nearby facilities when it is necessary to accomplish the TDY mission. If TDY housing is not available for all members of the team, then each member may be issued a CNA. Orders should state that such requirement exists.

g. DOD personnel who are physically disabled shall not be required to occupy Government-owned or -controlled housing at the TDY station if housing will not accommodate their disability.

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Tab 42

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Standard 42 Reference Excerpts

TR 350-6, para 2-15, After Action Reviews (AARs) and sensing sessions.
a. Initial Entry Training commanders will establish a program for the conduct of AARs and sensing sessions for each training cycle (or class in AIT). The AARs are for cadre, and the sensing sessions are for IET soldiers. The purpose is to provide all levels of command an assessment of the training program, to include the strengths and weaknesses of the organization.

b. After Action Reviews will:

(1) At a minimum, be conducted at company and battalion level.

(2) For BCT/OSUT, company level AARs will be held at the end of each phase. Battalion level AARs will be held at the end of each cycle.

(3) For AIT, the senior IET commander will determine the appropriate intervals for conduct of AARs.

(4) The focus of the AARs must be on the quality of the training program, not on company averages or other numerical comparisons.

c. The commander will conduct the AARs and will review, as a minimum, performance in the following areas:

(1) Phase goals and objectives.
(2) Quality of values training.
(3) Quality of teamwork development effort.
(4) Basic rifle marksmanship program.
(5) Individual tactical training periods.
(6) Physical fitness training program.
(7) Field training exercise.
(8) Phase Testing.
(9) Discharges and restarts by type.
(10) Stress identification and management.
(11) Management of the heat/cold injury prevention program.
(12) Training injuries, safety program, and risk management.
(13) Treatment of soldiers by cadre.
(14) Quality of committee group instruction.
(15) Quality of facilities used by soldiers.
(16) Conduct of reinforcement training.
(17) Unit equal opportunity and prevention of sexual harassment programs.
(18) Integration and reception.
(19) Nuclear, biological, and chemical training.

d. Sensing sessions with IET soldiers are an effective means for assessing command climate and provide leadership a forum for identifying and resolving problems.

(1) At a minimum, sensing sessions will be conducted at the company and battalion level.

(2) Sensing sessions will be held at mid-course and at the end of each cycle.

TR 350-6, para 3-6b, Lesson plans and instructor preparation.
b. Each ATC and school will establish a system for monitoring and improving the quality of instruction. Essential to this is a standardization/certification process to ensure that each instructor is fully qualified and current in all aspects of their subject. This certification will be IAW TRADOC Reg 350-70. All IET instructors will accomplish semiannual physical fitness testing.

TR 350-6, para 3-29, Advanced Individual Training feedback system.
Advanced Individual Training commanders and other recipients of soldiers from BCT installations will provide direct feedback to BCT commanders on the quality of the soldiers they receive. Some topics for discussion may include morale on arrival, medical condition, common task proficiency, physical condition, DA Form 5286-R completion, completeness of training records, and possession of TRADOC Pam 600-4.

TR 350-6, para 3-31f 3-31, Testing procedures for AIT and the MOS portion of OSUT.
f. Tests will be monitored by quality control personnel reporting to the brigade or ATC commander, as determined by the local commander. Unit cadre personnel must be certified IAW TRADOC Regs 350-70 and 350-18 before they are permitted to participate in the testing process.

TR 350-70, Part III.

Part III

Evaluation and Quality Assurance

III-0. Part Overview

Purpose a. Part III provides policy governing the Evaluation and Quality Assurance Program of the U.S. Army Training and Doctrine Command (TRADOC). This is TRADOC's application of the quality assurance principles of FM 25-100, Training the Force, and the evaluation function of the Systems Approach to Training (SAT) process. It covers evaluation/quality assurance of the training, products, and institutions that present the training. Also covered is accreditation of training institutions, training product/material validation, and instructor checklists.

Applicability b. Part III of this regulation applies to all Total Army School System (TASS) schools, both Active and Reserve Component.

Part Index c. This part covers the following:

Chapter Number	Content
III-1	Evaluation and Quality Assurance Program Description and Requirements
III-2	Total Army School System Accreditation Program
III-3	Product/Material Validation
III-4	Evaluating Instructor Performance

Note: Throughout Part III, DOES refers to Directorate of Evaluation and Standardization or functionally equivalent organization which implements these measures for the proponent school commandant.

Chapter III-1
Evaluation and Quality Assurance Program Description and Requirements

III-1-1. Chapter Overview

Introduction a. Evaluation is the cornerstone of quality training. Implementation of Army Training XXI (ATXXI) and the return on investment of major resource investments in Total Army Training System (TATS) Courses, the Total Army Distance Learning Program (TADLP), and accreditation of Total Army School System (TASS) training institutions heighten the criticality of having training products that are efficient and effective and in compliance with Department of the Army (DA) and TRADOC policy and guidance. Criticality increases due to outsourcing of much of the training development (TD) workload, especially multimedia development.

Chapter Overview b. This chapter describes the TRADOC Evaluation and Quality Assurance Program and establishes roles, responsibilities, and requirements. The Training Development Analysis Activity (TDAA), ODCST, serves as the Program Manager (PM) for the entire TRADOC Evaluation and QA Program, representing the DCST and CG, TRADOC. The Deputy Chief of Staff for Education (DCSED) is the proponent for the accreditation functional area.

Note 1: The roles, functions, and responsibilities referred to in this chapter for the Directorate of Evaluation and Standardization (DOES) apply to functionally equivalent organizations operating under a different name.

Note 2: This chapter provides policy and guidance for the overarching Evaluation and QA Program. See other chapters for additional guidance in specific functional areas:

- TASS training institution accreditation: Chapter III-2, Total Army School System Accreditation Program
- Product validation: Chapter III-3, Product/Material Validation

- Instructor certification and checklists: Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs; Chapter III-4, Evaluating Instructor Performance.

Chapter Index

c. This chapter covers the following:

Content	Paragraph
Administrative Information	III-1-2
Description and Requirements	III-1-3
DOES Roles	III-1-4
Evaluation Planning and Management	III-1-5
Master Evaluation Plan (MEP) Specifications	III-1-6
Evaluation Functional Areas	III-1-7
Evaluator Training and Qualification	III-1-8

III-1-2. Administrative Information

Purpose

a. The Evaluation and QA Program ---

(1) Ensures implementation of training and TD programs, processes, products, and guidance (to include the TADLP and TASS training materials) required in DA and TRADOC regulations.

(2) Provides support to decision makers at all levels through the collection, analysis, and distribution of user feedback concerning ---

(a) Quality of training and training products.

(b) Training of current doctrine.

(c) Assessment of student learning.

(d) Training impact and effectiveness analyses of emerging/new/displaced equipment/systems as well as training aids, devices, simulators, and simulations (TADSS).

(3) Assesses performance deficiencies and successful initiatives (lessons learned) from the collection and analysis of trend data.

(4) Includes standards and guidance for accrediting Army training institutions, certifying instructors, and qualifying training developers and evaluators.

(5) Enhances the crosswalk between doctrinal, combat, and training development in support of the Requirements Determination and Acquisition Process.

References

b. Required references and internet addresses are as follows:

Regulatory:

(1) AR 5-5, Army Studies and Analyses

(2) Army Reg 351-1, Individual Military Education and Training

(3) Army Reg 600-46, Attitude and Opinion Survey Program

(4) TR 5-3, The U. S. Army Training and Doctrine Command (TRADOC) Study Program

(5) TR 11-8, TRADOC Studies and Analyses

(6) TR 11-13, TRADOC Remedial Action Program (T-RAP)

(7) TR 350-16, Drill Sergeant Program
(8) TR 350-32, The TRADOC Training Effectiveness Analysis (TEA) System
(9) TR 351-10, Institutional Leader Education and Training
(10) TR 351-18, Total Army School System (TASS)
(11) Other chapters, this regulation:
(a) Chapter I-2, Safety and Environment
(b) Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs
(c) Chapter II-8, TRAS
(d) Chapter III-2, Total Army School System Accreditation Program
(e) Chapter III-3, Product/Material Validation
(f) Chapter III-4, Evaluating Instructor Performance
(g) Chapter IV-1, Needs Analysis
(h) Chapter V-8, CTC TD Interface
(i) Chapter VI-7, Student Performance Measurement/Testing.

Note: See **all** other chapters for minimum essential requirements (MERs).

Procedural:

(1) FM 25-100, Training the Force
(2) FM 25-101, Battle Focused Training
(3) CG TRADOC "Black Book" Requirements Determination
(4) TRADOC Pam 71-9, Requirements Determination

Internet:

(1) Army Doctrine and Training Digital Library: http://www.adtdl.army.mil
(2) Center for Army Lessons Learned (CALL) Internet Gateway: http://call.army.mil:1100/call.htm
(3) CALL SIPRNET (classified) Gateway: http://199.123.114.194:1100
(4) TRADOC Technical Media Standards: http://www.atsc.army.mil/dld/standard.htm

Definitions

c. See Glossary for other TD and program-related terms.

Non-resident training. Training presented to students that is not instructor/facilitator-led and does not take place in residence, e.g., it takes place in Army learning centers, distance learning (DL) classrooms, and student residences. Instruction is self-paced.

Resident training. Training presented, managed, and controlled by an on-site instructor or facilitator, small-group leader, or otherwise designated trainer.

TASS Training Battalions. TASS Training Battalions comprise all NCOAs and schools of the Reserve Components and are functionally aligned with the appropriate Training/TD (Task) Proponents.

Total Army School System (TASS). A composite school system comprised of the AC, ARNG, and USAR institutional training systems. The TASS, through the Army's training proponents, provides standard training courses to America's Army, focusing on three main points of effort --- standards, efficiencies, and resources. The TASS is composed of accredited and integrated AC/ARNG/USAR schools that provide standard institutional training and education for the Total Army. The TASS training battalions are arranged in regions and functionally aligned with the Training/TD (Task) Proponents. (TR 351-18)

Responsibilities

d. See Appendix B, Responsibilities, for top-level responsibilities. Evaluation and QA Program-specific responsibilities are as follows:

Note: Each organization has specific responsibilities for providing both generic and branch unique assistance for its programs within the TASS. The Evaluation and QA Program does not modify existing command and control relationships.

Organization	Responsibilities
(1) CG, TRADOC ICW CG, Medical Command and CG, U.S. Army Special Operations Command	(a) Develops policy, standards, and procedural guidance governing the Evaluation and Quality Assurance Program. (b) Conducts Inspector General (IG) studies evaluating the training/TD processes and products to ensure meeting of the MERs in this regulation. (c) Provides funding and manpower for the QA Program.
(2) HQ TRADOC, Deputy Chief of Staff for Training	(a) Serves as the proponent/PM for the TRADOC Evaluation and Quality Assurance Program, representing the DCST and CG, TRADOC. (b) Establishes an Evaluation and Quality Assurance Program office and Program Manager to manage the Evaluation and QA Program to ensure implementation of training and TD programs, processes, and guidance required in DA and TRADOC regulations. Staff oversight involves periodic on-site visits to proponent schools to assess the functional areas and compliance of MERs listed in this regulation. (c) Assigns an Evaluation and QA Program Desk Officer to each proponent school, Army Management Staff College, John F. Kennedy Special Warfare Center, Academy of Health Sciences, Judge Advocate General's School, NGB, FORSCOM, and USARC to assist in

	executing evaluation and QA programs. (d) Manages and coordinates training effectiveness analyses (TEAs) and other special training studies with the Army Science Board, TRADOC Analysis Center (TRAC), Army Research Institute (ARI), Deputy Chief of Staff for Analysis, RAND Arroyo Center, and Training/TD (Task) Proponents as required. (e) Supports and participates as required in IG studies. (f) Establishes qualification requirements for training developers and evaluators. (g) Provides Army representative and chairs the Evaluation Subcommittee of the Interservice Training Review Organization (ITRO) as required; participates in ITRO and Joint reviews as required.
(2) HQ TRADOC, Deputy Chief of Staff for Training (continued)	(h) Analyzes higher HQ, HQ TRADOC, Combat Training Center (CTC), and IG evaluation findings/observations; assigns responsibility for problem resolution to appropriate Training/TD (Task) Proponent, TRADOC directorates, or major commands; tracks problem resolution to completion. (i) Ensures standardization and integration of policy in this regulation throughout other TRADOC/subordinate command regulations, supporting pamphlets, and training/TD-related Staff and Faculty Development Program courses/products. (j) Receives In-Progress Reviews (IPRs) and has final approval of HQ TRADOC-produced trainer/training developer courses/products (including those developed by contractor) to ensure compliance with this regulation.
(3) HQ, FORSCOM; HQ, USAREUR; HQ, USARPAC; EUSA	(a) Ensure --- 1 Administrative and logistical support operations in their respective schools are conducted IAW applicable regulations to provide the best possible support. 2 Corrective action is taken on respective command issues identified in accreditation, IG, and DCST-generated/forwarded reports. (b) Track all issues from Evaluation/QA and IG visits. (c) Provide evaluation feedback to the TD (Task) Proponent.

	(d) Provide troop support for TEAs.
(4) Chief, NGB, Director of Operations; Training Division Commander, USARC	(a)Ensure --- 1 Administrative and logistical support operations in respective ARNG and USARC schools are conducted IAW applicable regulations to provide the best support. 2 Corrective action is taken on ARNG- and USARC-related issues identified in accreditation, IG, and DCST-generated/forwarded reports. (b) Track all issues from Evaluation/QA and IG visits. (c) Provide accreditation support IAW Chapter III-2, Total Army School System Accreditation Program. (d) Provide evaluation feedback to the TD (Task) Proponent.
(5) Commanders/ Commandants, Training/TD (Task) Proponents, AMEDD, and USASOC Service School	(a)Conduct evaluations IAW this regulation to ensure MERs were met, collect and analyze evaluation data, and provide management reports of findings. (b)Establish an independent Evaluation and QA Program office reporting directly to senior leadership (not department heads) to implement the Evaluation and QA Program and all QA/evaluation functional areas thereof IAW this regulation. (c) Perform roles, responsibilities, and conduct of accreditations IAW Chapter III-2, TASS Accreditation Program. (d) Conduct instructor certifications IAW Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs. (e) Ensure evaluator/training developer training/qualification. (f) Ensure validation of all training courses and products. (g) Resolve Training/TD (Task) Proponent-related issues identified in TASS accreditation, IG, and DCST-forwarded reports.
(5) Commanders/ Commandants, Training/TD (Task) Proponents, AMEDD, and USASOC Service School (continued)	(h) Submit TEA requests to the TRADOC Studies Program; participate in TEAs as appropriate. (i) Evaluate compliance with TATS Course analysis, design, development, validation, and implementation requirements IAW TATS Course policy in this regulation. (j) Ensure validation of TADLP processes and products. (k) Evaluate effectiveness and compliance of contractor-

	developed training programs and products with policy and guidance in this regulation and the TADLP. (l) Annually consolidate critical information requirements; submit to Center for Army Lessons Learned (CALL) for consideration during collection efforts at the CTCs and contingency operations. (m) Provide to CALL copies of school lessons learned publications and research materials of permanent interest to the Army as a whole for inclusion in the online CALL database. (n) Retrieve and report to trainers or training developers, as appropriate, any CALL, CTC, or other-reported deficiencies; recommend solutions; and follow up to verify corrections as required by senior leadership. (o) Ensure currency of all training products, courses, and training support packages (TSPs), to include electronic versions in the Army Doctrine and Training Digital Library (ADTDL) and, upon standup, Digital Training Access Centers (DTACs). (p) Ensure conduct of quality control (QC) of each TD process/product in this regulation. (q) Ensure QA of noncommissioned officer academies (NCOAs). (r) Ensure QC of applicable training institutions, e.g., Sergeants Major Academy for their respective NCOAs. (s) Provide input to manpower and budgetary resource acquisition documents. ***Note:*** The above responsibilities need to be shared/divided between CASCOM and its Combat Service Support schools.

III-1-3. Description and Requirements

Description a. Evaluation is one of the five phases of the Army's TD process, i.e., the Systems Approach to Training (SAT). As such, it is a dynamic process that can occur as formal internal and external evaluations or informal feedback between the student and instructor as well as between the field commander or CTC and the proponent school. It ---

(1) Ensures implementation of training and TD programs, processes, and guidance required by law or regulations.

(2) Verifies the use of the SAT process in the analysis, design, and development of training and training products.

(3) Impacts analysis decisions (i.e., whether or not there is a need for training/ training products; who needs the training; and what tasks

are trained) and each of the other SAT phases: design, development, and implementation.
(4) Provides feedback to decision makers on effectiveness and appropriateness of both the product development process as well as the training programs and products.
(5) Identifies training, training product, and training/TD management deficiencies; recommends corrective actions; and follows up to ensure corrections.

Outputs

b. As evaluation is one of the phases in the SAT process, the entire function is a **minimum essential requirement (MER)**. Minimum essential outputs:
(1) Evaluation reports from internal and external evaluations of the functional areas with identified deficiencies and recommended corrective actions. Evaluators must ensure the MERs listed in the "Outputs" paragraph of each chapter of this regulation are met.
(2) Follow-up on identified deficiencies.
(3) Validated training courses/products.
(4) Accredited training institutions.
(5) Certified instructors; qualified evaluators and training developers.
(6) Validated evaluation instruments.
(7) MEP (and supporting TD Project Management Plans as required).

III-1-4. DOES Roles

Roles

a. The DOES (or functionally equivalent organization) is the "evaluator" of the Army's training development process, instructors, training institutions, as well as training and training programs and products. DOES evaluation roles are described below.

Role	Activities
(1) Total Army Distance Learning Program Master Plan (TADLP-MP)	The DOES supports evaluation/quality assurance of the TADLP implementation. Program elements evaluated are as follows: (a) Student management (i.e., tracking of students through resident and DL course modules). (b) Scheduling of facilities, students, courseware, equipment, OPTEMPO, and other resource requirements. (c) Product management: 1 Test management/grading. 2 Appropriateness and effectiveness of courseware/media. 3 Development of products IAW TR 350-70, infrastructure standup, and TRADOC Technical Media Standards. (d) DL training and training management.

(2) Internal Evaluation Program	The DOES conducts internal evaluation of the following functional areas: SAT process, Individual Training and Education Process/ Program, training products, personnel (instructor evaluation/ certification; evaluator and training developer qualification), Training Institutions/facilities, conduct of needs assessments, and unit training. This evaluation --- (a) Ensures that training and training products are developed IAW the SAT process (i.e., as the result of a needs analysis and the training analysis, design, and development requirements in this regulation), which will result in efficient and effective training. (b) Ensures appropriate conduct of training/instruction and training transfer. (c) Involves evaluation of training products to determine their correctness, efficiency, and effectiveness. (d) Involves verification of certified instructors and qualified evaluators and training developers.
(3) External Evaluation (continued)	The DOES manages the school's outreach program to Active and Reserve Component units (i.e., unit evaluation), TASS Training Battalions, as well as non-resident instruction (i.e., non-resident DL). It involves the evaluation of instruction, training transfer, and training products. The prime focus of the program is to obtain feedback concerning the competency of graduates and effectiveness and utility of proponent products. The focus in the future will be on the effectiveness of DL and DL products. The primary modes of gathering information are through observation, structured interviews, and surveys/questionnaires. Resource constraints will require use of “distance evaluation” techniques (e.g., electronic mail, internet, or video teleconferencing) for interviews, surveys, and unit/CTC/CALL feedback.
(4) Major Exercise and CTC Interaction	The DOES serves as a POC for consolidating school/branch proponent areas/topics for observation and comment and for interaction with other proponent schools and major subordinate commands when proponent schools provide SMEs to serve as observers/data collectors during CTC interactions and during TRADOC's participation in major exercises. The DOES: (a) Annually consolidates Training/TD (Task) Proponent’s critical information requirements and submits requirements to CALL for consideration during collection efforts at the CTCs and contingency operations. (b) Retrieves and reports to trainers or training developers, as appropriate, any CALL or CTC-reported deficiencies,

<table>
<tr><td></td><td>followed by verification of deficiency corrections.
Note:See Chapter V-8, CTC TD Interface, for CTC and Training/TD Proponent interface responsibilities/actions.</td></tr>
<tr><td>(5) Standard-ization</td><td>The DOES provides oversight of a school's efforts in support of Army and joint standardization programs, as required.</td></tr>
<tr><td>(6) CALL Interaction/ Lessons Learned Program</td><td>Proponent schools establish points of contact (POCs) to facilitate coordination of lessons learned actions with CALL. CALL and school POCs coordinate for lessons learned collection teams; clarification of proponent branch issues included in CALL collection efforts; staffing of Doctrine, Training, Leader Development, Organization, and Materiel and Soldiers (DTLOMS) implications raised during CALL analysis; and staffing of TRADOC Remedial Action Program (T-RAP) (TRADOC Reg 11-13) issues. The DOES responsibilities relative to CALL are as follows:
(a) Establish POC (name and telephone number) for lessons learned.
(b) Access:
<table>
<tr><th>This internet address…</th><th>For…</th></tr>
<tr><td>CALL Gateway: http://call.army.mil:1100</td><td>Lessons learned, tactics, techniques, and research materials (including consolidated operations and training feedback).</td></tr>
<tr><td>http://call.army.mil:1100/call/ homepage/calldb5.htm</td><td>Unclassified sensitive CALL Database.</td></tr>
<tr><td>SIPRNET: http://199.123.114.194:1100)</td><td>Classified CALL Gateway and Database.</td></tr>
</table>
(c) Provide issue updates to CALL analysts.
(d) Assist CALL analysts in the analysis of lessons learned.</td></tr>
<tr><td>(6) CALL Interaction/ Lessons Learned Program (continued)</td><td>(e) Respond to CALL routine and priority issue taskings.
(f) Task school training and TD activities/directorates for responses to CALL issues; follow up to verify deficiency corrections.
(g) Provide to CALL copies, digital and hard copy, of school lessons learned publications and research materials of permanent interest to the Army as a whole for inclusion in the online CALL database.</td></tr>
<tr><td>(7) TRADOC Studies Program</td><td>The DOES identifies requirements for and serves as sponsor of TEA studies. For new materiel systems or TADSS, TEAs are required (TR 350-32) before each milestone decision review and post-fielding unless waived</td></tr>
</table>

	by DCST. TEAs typically assess training impacts of new equipment systems, estimate or measure training effectiveness and cost effectiveness of alternative training programs, or assess effectiveness of fielded training. The DOES submits TEA study requirements for the next FY in response to the annual HQ TRADOC call for studies (see Chapter II-2, Training Development Workload and Resource Management). Study requirements should be forwarded to HQ TRADOC, DCST (ATTN: ATTG-CF) and should indicate resources required to conduct the study (e.g., travel funds for data collection; assistance from TRAC to carry out the study). The DOES-identified studies are reviewed, prioritized, and programmed for DCST resources. ***Note:*** Training/TD (Task) Proponents also receive post fielding feedback from using units; this feedback can improve training and training support products.
(8) Interservice Course Evaluation	The DOES interacts with other service evaluation directorates on matters pertaining to interservice course evaluation. Each service evaluates its own interservice training courses. The ITRO evaluation subcommittee will not conduct evaluations, surveys, or visits unless requested to do so by a host or participating service through the ITRO steering committee.
(9) TASS Training Institution Assistance/ Accredita-tion	The DOES establishes and maintains direct communication and visitation links with designated TASS Training Battalions. The relationship with the TASS Training Battalions is one of both assistance and evaluation. The DOES schedules accreditation visits to TASS Training Battalions. See Chapter III-2, Total Army School System Accreditation Program, for accreditation policy and guidance and TR 351-18, TASS, for functional alignment and other TASS policy.

III-1-5. Evaluation Planning and Management

Introduction

a. Management of the Evaluation and Quality Assurance Program involves the use of planning documents, the development of data collection documents, evaluation of data analysis, and preparation of reports and back-up data.

Master Evaluation Plan (MEP)

b. The Master Evaluation Plan is the Training/TD (Task) Proponent's overall strategy for accomplishing evaluation/QA functions and providing specific descriptions of programs. All school directorates and departments should participate in development of the Master Evaluation Plan since the plan must serve the feedback needs of all.

Note 1: See Chapter II-2, Training Development Workload and Resource Management, for additional management planning guidance.

Note 2: See Paragraph III-1-6, Master Evaluation Plan Specifications (this chapter), for MEP requirements.

Information Collection

c. Surveys/questionnaires, structured interviews, and on-site observations are means by which evaluators can collect information. The advantages and disadvantages of surveys/ questionnaires and structured interviews are portrayed in the following table:

Source	Advantages	Disadvantages
(1) Survey/ Questionnaire	(a) Efficient for large populations. (b)No field staff required (from the source of the questionnaire). (c) Relatively low in cost. (d) Possible elimination of interviewer bias. (e) Very useful during field visits to units to ensure better control, shorter response time, and increased reliability and validity of data.	1 Slow responses (i.e., data collection). 2 Loss of some control (administration of the survey). 3 Possibility of misinterpretation and biased responses.
(2) Face-to-face Interview (structured interview)	(a)The most flexible data collection technique. (b) Higher assurances of proper identification of respondents. (c) Better response rates.	1 Relatively expensive and time consuming. 2 Interviewer training/ supervision is required. 3 Possible interviewer bias in results.
(3) Observations	(a)High degree of accuracy. (b)Observation of actual performance allows identification of problems, task steps, etc.	Time consuming and resource intensive, especially if TDY is required.

Note 1: Evaluators must be trained to develop and conduct surveys/questionnaires as well as face-to-face interviews.

Note 2: Surveys for participants outside of TRADOC require approval and survey control numbers IAW AR 600-46.

Note 3: The success of structured interviews relies heavily on the skills of the interviewer and the quality of prior question development. The following procedures will help ensure effective interviews:

- Ask questions which seem reasonable to the respondent and directly relevant to the matter under discussion.
- Use language appropriate for the respondent.
- Convey a positive attitude, concern for respondent, and importance of topic.

- Structure content of interviews so important items of inquiry are in writing, although the interviewer should allow adequate time for spontaneous remarks from the respondent.
- Plan, coordinate, and schedule ahead of time to ensure the respondent's availability with as little interruption as possible.
- Provide some form of feedback to respondents expressing appreciation for their input and reflecting on how their input contributes to the overall results of the evaluation.
- Collect only personal data that is relevant to the survey; communicate that relevancy to the respondent.

Evaluation Data Analysis

d. The DOES establishes and maintains an internal capability to perform data analysis services, such as ---

(1) Interacting with statistical data analysis packages.

(2) Establishing a baseline for instructor evaluations, test analysis, end-of-course student critiques, and graduate surveys.

(3) Analyzing data from external feedback sources, such as EXTEV visits, lessons learned observations and issues, field returnee interviews, graduate/supervisor questionnaires, and other feedback sources.

Report Writing and Data Displays

e. The DOES must provide objective information in a form which is useful in making assessments and directing change. It should use computer-generated reports which portray data in tables and graphs to clearly depict the findings for management review.

III-1-6. Master Evaluation Plan (MEP) Specifications

Submission Requirements

a. Reporting and distribution requirements:

(1) Frequency: Annually.

(2) Due date: NLT 1 May of each year for the following fiscal year.

(3) To: Cdr, TRADOC, ATTN: ATTG-CD, Fort Monroe, VA 23651-5000.

(4) Copy furnish: Major subordinate commands, as appropriate.

(5) Contents/Format: (See following paragraph.)

MEP Contents

b. The MEP is the planning document that defines all evaluation requirements for the next FY, to include all evaluation requirements in evaluation project management plans. It will contain the following information (state “None” if resources prohibit conduct of specified evaluations):

(1) Executive summary.

(2) External evaluation plan. Include plans for ---

(a) Assistance visits (for affiliated TASS Training Battalions).

(b) Assessment/accreditation (for affiliated TASS Training Battalions).

(c) AC and RC unit visits.
(d) Assessment of new system training/training product development for compliance with TR 350-70.

. (3) Internal evaluation plan. Include ---
(a) Instructional reviews IAW applicable laws and regulations.
(b) TD process reviews.
(c) Training product reviews.
(d) Personnel (instructor, training developer, and evaluator) certifications and qualifications as appropriate.
(e) Needs assessments and special higher HQ or IG studies conducted.

MEP Supporting Plans

c. TD Project Management Plans (MANPLANs) that support the Master Evaluation Plans may be simple, unwritten (i.e., the project requirements may exist in a database but not as a formal report) or complex, very detailed (they may even include a Memorandum of Understanding). The following outline provides a sample format for evaluation project management plans:

(1) Purpose/Scope.
(2) Objectives.
(3) Background.
(a) Issues.
(b) Impact.
(c) Assumptions.
(d) Limitations.
(4) Essential elements of analysis.
(5) Methodology.
(6) Resource requirements.
(7) Responsibilities and interactions (manpower, TDY, materials, etc).
(8) Schedule of events (timelines and milestones).
(9) Appropriate annexes, appendices, etc.
(10) Reporting requirements:
(a) Timelines and milestones for interim and final reports.
(b) Report format and content.
Note: Include ---
- Identified deficiencies and/or "good" reports.
- Recommended solutions.
- Verified corrections.

(11) Distribution requirements.

III-1-7. Evaluation Functional Areas

Requirements

a. The evaluation function encompasses six major functional areas:
(1) SAT process.
(2) Individual Training and Education Process/Program.
(3) Products.
(4) Personnel.
(5) Training Institutions/Facilities.
(6) Needs Assessment.
‘ (7) Unit Training

SAT Process

b. Evaluation of the SAT process is to ensure that training products and materials are developed in compliance with TR 350-70 for analysis, design, development, format, submission, and fielding. The DOES is responsible for ensuring the commander/ commandant that the SAT process was followed and MERs were accomplished (to include affirmation of needs analysis or training strategy determination of a valid need for training/ training products). As a part of this function, DOES personnel:

(1) Participate as independent team members during the analysis, design, and development of training and training products and as non-voting members on boards and In-Process Reviews (IPRs) to ensure SAT requirements are met.

(2) Verify safety, risk assessment, and environmental protection measures have been considered throughout the TD process and incorporated into training products IAW Chapter I-2, Safety and Environment (this regulation).

Instructional Process/ Program

c. Evaluation of the instructional process/program is critical to determine the effectiveness of courses of instruction for which the school has proponency. It is an independent determination of the quality of training and testing while concentrating on the actual presentation of instruction-presented and self-paced training, competency of instructors and examiners, relevance as well as adherence of course content to the training objectives, management and usability of DL training/training products, and training transfer.

(1) Instruction.

(a) Purpose. The purpose of instruction evaluation is to provide assistance and improve training. DOES evaluation will not impinge on the inherent responsibility of department directors for quality control of instruction. It is not the same as staff and faculty training development follow-up and consultation. The evaluation focus is on whether or not ---

1 DL and student management is effective and efficient.

2 The instructional environment (facilities; equipment; TADSS; ranges; FTX site; etc.) contributes to the learning experience.

3 The instructor demonstrates competence in the tasks being taught and skill in instructional techniques appropriate for the method of instruction.

4 Instructors are aware of and have access to classified (as required) and unclassified sensitive CALL Gateway databases and other research materials, including the consolidated feedback from Army operations and training, to review the latest lessons available; they must also implement new tactics, techniques, and procedures (TTP) as appropriate.

5 Student learning is taking place through opportunities for interaction, such as questions and answers, role playing, student practice, testing, and after-action reviews (AARs), e.g., AARs after field training exercises.

6 A student critique system gives students the opportunity to freely make comments in writing and verbally about instruction and administrative support matters; proponent authorities should follow up on the input.

(b) Evaluation of student testing/performance measurement. Students must perform to standards and conditions prescribed in lesson plans/lessons. The DOES:

1 Students are tested to determine whether or not they can accomplish the Terminal Learning Objectives (TLOs).

Note 1: It is not the intent of this policy to have the QA activity (DOES) conduct testing.

Note 2: See Chapter VI-7, Student Performance Measurement/Testing.

2 Provides a selective, independent assessment of validity and suitability of resident and nonresident tests (e.g., distance learning material, etc).

3 Verifies tests have been reviewed/analyzed for reliability.

4 Verifies and provides comments on the quality of test construction and instructions to testers and students.

5 Determines if tests measure task performance to TLO standards.

6 Maintains statistics on test results to determine trends and provides feedback to departments on adequacy of tests and test items. Automated systems should provide test results, and all directorates, to include DOES, should have access to the data.

(c) Location: Evaluation of instruction may take place in various sites:

1 The Training/TD (Task) Proponent.

2 Army Education Center, Army Training Centers (ATCs) (in coordination with ATC QA elements), and DL classrooms.

3 TASS Training Battalions.

(2) Training transfer. Student success in performance, both during and after instruction/training, substantiates that instruction/training effectively trains the required critical tasks and supporting skills and knowledge. Evaluation of training transfer involves validation of transfer of learning to job/mission. The DOES will provide the Directorate of Training (or functionally equivalent organization) and departments input for their use in assessments of training needs and objectives, such as the difference between actual performance of individuals and units and performance to required standards Input may include ---

(a) Higher HQ, HQ TRADOC, CTC, Call, and IG evaluation findings.

(b) Issues from EXTEVs (survey and interview responses).

Products

d. Training product evaluation includes ---

(1) Evaluation of individual, collective, and self-development training products and literature for currency, usability, efficiency, effectiveness, doctrinal and technical correctness, and compliance with current Army/TRADOC policy and TRADOC Technical Media Standards.

(2) Verification that Training Requirement Analysis System (TRAS) documents meet requirements in Chapter II-8, TRAS (this regulation) as required.

(3) Training courses/instructional materials are of high quality, correctly reflect course design decisions, identify training objectives and performance standards, and appropriately illustrate and describe the material to be taught.

(4) Validation of courses, training products, and materials. Validation differs from evaluation in that validation is the process used by the training developer to determine if a new/revised training product/material accomplishes its intended purpose efficiently and effectively. The training proponent conducts individual and/or group trials, collects and analyzes validation data, and makes any necessary revisions to the training product/material.

Note: See Chapter III-3, Product/Material Validation, for policy and guidance on validation of training courses, products, and materials.

Personnel

e. Evaluation of personnel includes Instructor certification as well as Training Developer and Evaluator qualification. See the following references for respective policy and guidance:

(1) Instructor certification: Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs; and Chapter III-4, Evaluating Instructor Performance.

(2) Evaluator qualification: (See guidance in this chapter.)

(3) Training Developer qualification: Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs.

Training Institutions

f. Evaluation of DL will require assessment of DL classrooms and facilities to verify they meet TRADOC Classroom XXI Master Plan and TADLP-MP requirements to support DL. Also, TASS training institutions are evaluated in order to be accredited. See Chapter III-2, Total Army School System Accreditation Program, for policy and guidance in the accreditation of TASS training institutions.

Note: Some Training/TD (Task) Proponents go through the Council on Occupational Education to be accredited. Proponent accreditation should always be to the same standard as that of the TASS Training Battalions.

Needs Assessment

g. Needs assessment is a process of discovering weaknesses or potential problems for training or job/mission performance. It can be a ---

(1) Very *informal* assessment of training and the identification of a potential training or TD need to be confirmed by needs analysis (IAW Chapter IV-1, Needs Analysis).

(2) *Formal* process for the training impact analyses of emerging/new/displaced systems done as a part of the TEA Program. See appropriate references at the beginning of this chapter for TEA and TRADOC studies policy and guidance.

Unit

h. Unit training evaluation is the process used to identify collective and individual task

Training

performance and product deficiencies in unit training and to obtain recommendations for improvement of training or the products that support training. This evaluation involves both individual and unit training and doctrine products (e.g., soldier training publications [STPs]; mission training plans [MTPs]; drills; training support packages [TSPs]; training aids, devices, simulators, and simulations [TADSS]; field manuals [FMs]; training circulars [TCs]). Unit and training proponent evaluators determine the value, technical accuracy, and efficiency and effectiveness of the training, training programs, and products. The evaluators report deficiencies and recommendations for improvement to the training proponent for conduct of a needs analysis. In effect, the proponent performs an external evaluation to identify deficiencies (and improvement recommendations) for subsequent needs analysis to determine the need to improve, eliminate, or replace the training or training products.

III-1-8. Evaluator Training and Qualification

Evaluator Responsibilities

a. Evaluators are the eyes and ears of the command; they represent command authority whenever they evaluate training inside or outside of the proponent school. Evaluators must be thoroughly trained in every aspect of their evaluation responsibilities. Competent evaluators are just as critical a link in the SAT as are trainers. Accordingly, Training/TD (Task) Proponents will ensure their evaluators are a credit to the command in their bearing, competence, professionalism, and commitment to excellence in training.

Evaluator Training

b. Evaluator training requirements are as follows:

Evaluators will complete ---	Before evaluating ---
(1) Training Evaluator Course ***Note 1:*** The TRADOC Training Evaluator Course is under revision. ***Note 2:*** Evaluators who accredit should also take this course as accreditation involves evaluation of instruction and training institutions.	(a) Processes. (b) Programs. (c) Products, including tests. (d) Personnel. (e) Training Institutions. (f) Needs assessment/Special studies. (g) Development of surveys/ questionnaires and face-to-face interviews.
(2) Systems Approach to Training (SAT) Basic Course	(a) SAT process. (b) Training products.
(3) Total Army Instructor Training Course (TAITC)	Instruction.
(4) Small Group Instructor Training Course (SGITC) in addition to TAITC	Small group instruction.
(5) Video Teletraining Instructor Training Course (VTTITC)	Video Teletraining
(6) Test Writing (TBD) ***Note:*** Prerequisite is the SAT Basic Course	Tests

Note 1: Civilian and military instructors must receive the same or equivalent training.

Note 2: At least one member of the evaluation team should have the technical knowledge of the evaluated areas.

Note 3: See Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs, for a complete list of Staff and Faculty Common Training course requirements.

Evaluator Qualification

c. In addition to formal training, evaluators will be required to perform their evaluation duties under the close supervision of a fully qualified and experienced evaluator until deemed by the Director of Evaluation (or equivalent function) to be fully qualified to represent the proponent school and perform evaluation duties without supervision. To meet minimum evaluator qualification requirements and standards of competency, proponents must ensure evaluators are ---

(1) Imbued with the idea that their mission is to insist on standards being met and to **assist** training institutions to meet those standards. In this sense they are leaders and trainers.

(2) Thoroughly familiar with regulations governing development, administration, operation, logistical support, and conduct of training in Army NCO Academies and TASS training institutions.

(3) Familiar with the format of Training/TATS Course TSPs, Shared/Common Task TSPs, lesson plans, and course management plans (CMPs).

Note: Evaluators should effect a “seek and help” versus a “seek and hit” approach. The intent should be on ensuring the training development function produces the Mission Essential Requirements of each process/product in this regulation, seeking training efficiency and effectiveness, providing guidance to correct deficiencies, and ensuring the viability of ATXXI training programs and products.

Chapter III-2

Total Army School System Accreditation Program

III-2-1. Chapter Overview

Overview

a. Chapter III-2 prescribes the who, what, when, where, and how of the Total Army School System (TASS) Accreditation Program, to include assistance visits. The Office of the Deputy Chief of Staff for Education (DCSED), HQ TRADOC, manages this program for the CG, TRADOC.

Chapter Index

b. This chapter covers the following:

Content	Paragraph
Functional Alignment	III-2-2
Accreditation	III-2-3
Assistance and Accreditation Authority and Responsibilities	III-2-4
Accreditation Evaluation Team	III-2-5
Accreditation Evaluator Qualifications	III-2-6
Conduct of Accreditation Evaluation Requirements	III-2-7
Report Format	III-2-8
Report Routing and Suspense	III-2-9
Corrective Actions	III-2-10

III-2-2. Functional Alignment

Purpose

a. Functional alignment is---
(1) Accomplished by aligning TRADOC proponent service schools with TASS Training Battalions.
(2) The link between the TASS Training Battalion and its associated TRADOC proponent school.
(3) Intended to develop shared responsibility for the quality of TASS Training Battalion graduates.
(4) An attempt to facilitate branch-unique assistance to aligned training institutions.

References

b. Required **regulatory** references are as follows:
(1) Army Regulation 351-1, Individual Military Education and Training
(2) TR 351-18, Total Army School System (TASS)

Requirements

c. Functional alignment policy and guidance are covered in TR 351-18.

III-2-3. Accreditation

Purpose/ Description

a. The CG, TRADOC is the Army's Executive Agent for accreditation and is the accreditation authority for all schools teaching TRADOC courses. The CG, MEDCOM, and CG, USASOC, are the accreditation authorities for their respective courses. The HQ TRADOC, DCSED provides accreditation policy and delegates the responsibility to accredit TASS schools to the appropriate proponent.

(1) The purpose of this program is to ensure that students in Army schools are
learning the right tasks---
(a) To the appropriate standards.
(b) From qualified/certified instructors and mentors.

(c) With all the necessary equipment, supplies, support personnel and facilities.
(d) In an atmosphere conducive to learning and supportive of an appropriate standard of military life.

(2) Accreditation is the formal authority to conduct (or continue to conduct) training. Conduct of Training is the most important function of the institution. How well it trains the soldier is based on the product it graduates. Therefore, institutions should not receive a withhold accredit or non-accredit based solely on their lack of Training Support unless it has a direct impact on the Conduct of Training, safety, health and welfare issues, any compromise of course examinations, discipline and fair treatment of soldiers, or the careers of soldiers.

(3) Accreditation certifies an institution's administration, operations, and logistical support are adequate to support training to course standards. It certifies all training follows the correct training methodology and task sequencing and certifies resources are IAW course requirements. It also certifies, with the assistance of proponent subject matter experts (SMEs), the institution is conducting phase/modules of training IAW the appropriate Training/TD (Task) Proponent's guidance.

(4) If institutions cannot provide quality training based on the POI and regulations due to the higher headquarters' (HQ) inability to provide adequate resources and support, the course or institution can receive a non-accredit due to higher headquarters' issues. The higher headquarters will be required to correct the identified problem in the manner and time frame outlined in Paragraph III-2-7f before the institution can receive an accreditation reinstatement.

Definitions

b. See Glossary for TD and program-related terms. Definition of term specific to this chapter is as follows:

Regional Coordinating Element. The TRADOC office in the Continental U.S. (CONUS) sub-geographical region that facilitates the coordination for Army training instructors, students, training devices, equipment, and facilities for Reserve Component (RC) individual soldier training.

References

c. Required **regulatory** references are as follows:

(1) Army Regulation 351-1, Individual Military Education and Training
(2) FM 25-100, Training the Force
(3) TR 351-18, Total Army School System (TASS), Appendix B, Accreditation Checklist; Appendix C, Sample Accreditation Checklist; and Appendix D, Sample Final Accreditation Report

Output Requirement

d. The **minimum essential requirement** is accreditation of the proponent school and each TASS Training Battalion. Training institutions will be accredited every 3 years in a single training year unless the functional proponent commandant determines a need for more frequent accreditation.

Types

e. There are two types of accreditation: institution and course. Normally, proponents accredit only TASS schools. Some branch-specific proponents (officer education/leadership) also accredit courses. Functionally aligned TASS Training Battalions will undergo institution accreditation and may undergo course accreditation at the discretion of the proponent.

(1) **Institution accreditation** certifies that an institution's Training Support and Conduct of Training are adequate to train to course standards. Institution accreditation includes evaluation of all training being conducted to ensure training methodology, sequencing, and resources are IAW course requirements.

(2) **Course accreditation** certifies that instruction is conducted IAW proponent guidance and that students graduating from the course are trained to the same standard as students graduating from the same course taught at the proponent service school. Only a subject matter expert (SME) designated by the respective proponent service school is authorized to evaluate and recommend accreditation of a course. Additionally, a course cannot be accredited unless the institution is accredited.

III-2-4. Assistance and Accreditation Authority and Responsibilities

Assistance/ Accreditation Authority

a. Commander, TRADOC, delegates accreditation and assistance authority to proponent school commandants for the TASS Training Battalions with which they are functionally aligned.

Assistance/ Accreditation Responsi-bilities

b. Assistance and accreditation responsibilities are outlined in the following table:

Activity	Responsibility
(1) HQ TRADOC, Deputy Chief of Staff for Education (DCSED)	(a) Orchestrates quality assurance (QA) in the TASS and arbitrates QA issues between the U.S. Army Reserve Command (USARC), National Guard Bureau (NGB), and the AC, to include proponent schools. (b) Will assist TRADOC proponent schools which have been delegated specific accreditation authority. (c) Resolves "higher HQ issues" identified during assistance visits or self evaluations and forwarded by Training/TD (Task) Proponent as required.

	(2) Regional Coordinating Elements (RCEs)	(a) Address unresolved issues to the appropriate authority for consideration; track issues for resolution. (b) Consolidate unresolved "higher HQ issues" and forward list to HQ TRADOC, DCSED. (c) Consolidate unresolved issues and forward list to HQ TRADOC, DCSED. (d) Conduct periodic announced and unannounced Training Observation (TO) visits to training site classes in session. (e) Execute TRADOC QA program within the region and arbitrate QA issues between TASS Training Battalions and functionally aligned TRADOC proponent school. (f) Monitor QA within the region, to include corrective action and coordination/conduct of evaluation visits, to ensure a continuing program of interrelated parts; anticipate and take preemptive actions to "de-conflict" potential QA problems within the region.
Responsi-bilities	(2) Regional Coordinating Elements (RCEs) (continued)	(g) Ensure all RCE personnel are trained and qualified as QA evaluators. RCE personnel may serve as composite team members for accreditation evaluations of TASS Training Battalions in other region. (h) Create and maintain a database of issues of regional interest extracted from Institutional Self Evaluation (ISE) reports; HQ TRADOC, DCSED trend reports; waiver requests; and accreditation reports. (i) Collect and review TO reports, ISE reports, accreditation reports, and HQ TRADOC, DCSED trend reports to determine trends of regional significance. RCE makes appropriate recommendations to HQ TRADOC, DCSED; the Adjutant General (TAG); and USAR Training Divisions. (j) Review all requests for waivers of QA requirements; endorse as appropriate; and forward a copy of request and endorsement to HQ TRADOC, DCSED. (k) Disseminate results of QA visits to appropriate commands. (l) Budget for and fund QA travel. Initiate and process travel orders for QA visits and training of evaluators.

(3) Commanders/ Commandants/ Training Proponents and Other Designated Proponents	(a) Establish and maintain a working relationship with functionally aligned regional Training TASS Battalions. (b) Conduct or coordinate accreditation of proponent school. (c) Coordinate and conduct accreditations of TASS Training Battalions as required/coordinated between proponent school and Training TASS Battalions. Proponent school Directorates of Evaluation and Standardization (DOES) or equivalent function evaluate all Training TASS Battalions within a school brigade for accreditation during the same fiscal year. (d) Provide TASS Training Battalions assistance as requested in the self evaluation. (e) Determine the number of persons required to conduct assistance visits based on estimated workload. A tri-component team is not required for assistance visits. (f) Forward to HQ, TRADOC through the appropriate RCE a summary report of unresolved "higher headquarters' issues" identified in the TASS Training Battalion self evaluation and during the assistance visit. For each issue, the report will specify exactly what the problem is, what is causing the problem, impact on training or soldier welfare, actions taken to resolve the problem, and results of those actions. (g) Maintain accreditation standards within proponent schools IAW Checklists in TR 351-18. (h) USASMA is responsible for developing an accreditation SOP for multi-functional regiments/brigades (USASMA). (i) Fund all visits (a proponent school responsibility).

Assistance/ Accreditation Responsi-bilities (continued)

Activity	Responsibility
(3) Commanders/ Commandants/ Training Proponents and Other Designated Proponents (continued)	(j) Accredit as specified below: 1 **Proponents:** evaluate and accredit proponent school and TASS training institutions. ***Note:*** Accreditation of proponent school can be through the Directorate of Evaluation and Standardization (DOES) (or equivalent function) or through an outside agency. 2 **U.S. Army Sergeants Major Academy (USASMA)**: accredit all TASS NCOAs. 3 **U.S. Army Training Center and Fort Jackson**: accredit all Drill Sergeant School Battalions. 4 **U.S. Army Infantry Center and School:** accredit Air Assault and Officer Candidate School (OCS) courses. ***Note:*** OCONUS TASS multifunctional brigades and all TASS NCO academies are functionally aligned with USASMA for accreditation. USASMA assembles a composite evaluation team of subject matter experts who can evaluate courses taught at these training sites at the optimum time, reducing training distraction caused by multiple accreditation visits. Teams will consist of CA, CS, CSS, and others as appropriate. Each team will appoint a team chief and appropriate SMEs. Those sites/courses outside the optimum window will be scheduled for accreditation directly with the appropriate proponent school. A copy of all assistance/ accreditation reports will be provided to USASMA. (k) Coordinate assistance visits directly between the multi-functional brigade and the proponent schools. (l) Forward to HQ TRADOC, DCSED completed accreditation reports, to include summary, checklists, and notes to checklists. (m) Resolve all disputes concerning accreditation evaluations and reports. The decision of the proponent commandant is final. (n) Determine their own tri-component team requirements.
(4) Commanders, TASS Training Battalions	(a) May request assistance visits if they agree to fund the cost of the visit. (b) Prepare for assistance visits by completing a self evaluation based on the accreditation checklist IAW TR 351-18 and the results of any command inspections or training evaluations conducted by their higher headquarters. ***Note:*** The self evaluation will identify specific problems for which proponent assistance is requested and problems which can only be resolved by higher headquarters' action. The latter must be specific about who and what the problem is, impact on training or soldier welfare, and actions the school has taken to resolve the problem. School battalion provides the self evaluation to the aligned proponent NLT 30 days before the scheduled assistance visit. This allows the proponent time to plan for and prepare requested assistance as well as opportunity to discuss "higher headquarters' issues" with appropriate higher headquarters' staffs.

Assistance/ Accreditation Responsi-bilities (continued)

Activity	Responsibility
(4) Commanders, TASS Training Battalions (continued)	(c) Prepare and maintain a Mission Essential Task List (METL) IAW FM 25-100. The purpose of the METL is to provide a foundation against which the institution evaluates itself. The METL and the associated ISE provide the TASS Training Battalion with vehicles to bring attention to training challenges in a non-threatening environment. The focus of the process is to ensure high quality, relevant training courses. When a TASS Training Battalion surfaces challenges, it ensures that those issues are brought to the attention of the training chain of command and the Training/TD (Task) Proponent. (d) Annually prepare an ISE. Purpose of the ISE is to maintain the institution's focus on quality and to establish the Total Army Quality environment of encouraging everyone to contribute to the organization's success. (e) Appoint a team of staff members (including Title XI AC soldiers) and instructors to evaluate the institution in comparison to the METL and accreditation standards. The ISE team--- 1 Meets annually to discuss findings and suggestions. Meeting format is an After Action Review (AAR) of the previous year and projection of the future. 2 Identifies challenges which preclude high quality instruction or ideas/insights which should be analyzed for implementation at all TASS Training Battalions. 3 Prepares a written report of recommendations with appropriate references and explanatory paragraphs and forwards list to school battalion commander. (f) Address issues as appropriate and forward unresolved issues to school brigade commander for record.
(5) Commanders, TASS Training Brigades	Brigade commander consolidates school battalion reports and forwards them, with comment, through Division Institutional Training DIV(IT)s or TAG to the RCE.

III-2-5. Accreditation Evaluation Team

Accreditation Evaluation Team Composition

All accreditation evaluations should be conducted by tri-component teams of Active Army, Army National Guard, and Army Reserve soldiers as determined by the proponent. Tri-component teams ---

a. Are determined by proponents.
b. Can share perspective of uniqueness of operations in one or another component.
c. Are formed from proponent-attached Title XI and RC soldiers.
d. Will include a SME for each Conduct of Training course evaluated.

III-2-6. Accreditation Evaluator Qualifications

Guidance a. Evaluators are the eyes and ears of the accrediting authority; they represent the accrediting authority wherever they evaluate training in Army schools worldwide. Accordingly, proponent service school commandants will ensure their evaluators are a credit to their command in their bearing, competence, professionalism, and commitment to excellence in training. Proponent service school commandants verify and certify the qualifications of accreditation evaluators from that Training/TD (Task) Proponent.

Qualifications b. New accreditation evaluators will be required to perform evaluation duties under the close supervision of a fully qualified and experienced evaluator, until deemed by the Director of Evaluation and Standardization (DOES) (or equivalent functional element) to be fully qualified to represent the proponent and perform evaluation duties without supervision. Specific requirements are as follows:

(1) The **accreditation team chief** must meet all evaluator criteria and be---

(a) Thoroughly familiar with regulations governing Training Support and Conduct of Training in TASS schools.

(b) Able to draw together all the findings and recommendations of accreditation team evaluators into an Accreditation Summary Report which is suitable for general officer review.

(c) Able to resolve any differences which may arise among evaluators or between evaluators and the staff of the school being evaluated.

(d) Able to assist in the resolution of discrepancies in training to standard.

(2) The **accreditation team evaluator** must be---

(a) Thoroughly familiar with the regulations governing Training Support/Conduct of Training in TASS schools.

(b) Familiar with the format of POIs, Course Management Plans (CMPs), lesson plans, and Training Support Packages (TSP) in order to effectively use these materials in evaluating instruction.

(c) Imbued with the idea that their mission is to insist on standards being met and to assist schools in meeting those standards. In this sense, they are leaders and instructors.

(d) A graduate of an Instructor Training Course (ITC) and, if the course under evaluation is taught in the small group method of instruction, must have completed a Small Group Instructor (SGI) Course.

(3) The **subject-matter expert** evaluating Conduct of Training must---

(a) Be a graduate of the course being evaluated.

(b) Hold the CMF of the course being evaluated.

(c) Be a graduate of an ITC and, if the course under evaluation is taught in the small group method of instruction, must have completed a SGI Course.
(d) Be familiar with the format of POI, CMP, lesson plans, and TSP and be able to effectively use these materials in evaluating instruction using Part II (Conduct of Training) of the Accreditation Checklist and any proponent-specific checklists.

III-2-7. Conduct of Accreditation Evaluation Requirements

Planning and Coordination

a. As a minimum, TASS regions (AC, RC schools) will be accredited every 3 years in a single training year unless the functional proponent commandant determines a need for more frequent accreditation. At least 60 days prior to each scheduled accreditation evaluation visit, the team chief will send a message or memorandum to all concerned parties.

(1) Addressees include---
(a) The Commander of the TASS school to be evaluated.
(b) Director of Training (DOT) or functional equivalent of proponent school to be accredited.
(c) NGB and State TAG (for ARNG school battalions).
(d) FORSCOM, USARC, and DIV(IT)s (for USAR school battalions in CONUS).
(e) OCONUS Major Army Command (MACOM) (as appropriate).
(f) TRADOC (DCSED).
(g) RCEs.
(h) Proponents tasked to provide SMEs.
(2) The message will---
(a) Specify the dates of the scheduled visit. (This schedule should have already been agreed to in prior informal coordination between the evaluation team and the commander of the institution to be evaluated.)
(b) Request ARNG and/or USAR representation.

Note: Make final telephonic coordination with the TASS Training Battalion at least 1 week before the visit to confirm training schedules and class locations.

TASS Training Battalion Schedule

b. TASS Training Battalions will be evaluated for accreditation at both IDT and AT/Active Duty for Training (ADT), as applicable, in a single training year IAW the following plan:

YEAR 1 (1997, 2000, 2003, etc.)					
REGION	**CA**	**CS**	**CSS**	**HS**	**PROF DEV**
A	ALL BNs	ALL BNs	N/A	N/A	N/A
B	N/A	N/A	ALL BNs	ALL BNs	N/A
C	N/A	N/A	N/A	N/A	ALL BNs
D	ALL BNs	ALL BNs	N/A	N/A	N/A
E	N/A	N/A	ALL BNs	ALL BNs	N/A

F	N/A	N/A	N/A	N/A	ALL BNs
G	N/A	N/A	ALL BNs	ALL BNs	N/A
USARPAC	N/A	N/A	N/A	N/A	CGSC BNs
USAREUR	N/A	N/A	N/A	N/A	N/A

Year 2 (1998, 2001, 2004)					
REGION	**CA**	**CS**	**CSS**	**HS**	**PROF DEV**
A	N/A	N/A	N/A	N/A	ALL BNs
B	ALL BNs	ALL BNs	N/A	N/A	N/A
C	N/A	N/A	ALL BNs	ALL BNs	N/A
D	N/A	N/A	N/A	N/A	ALL BNs
E	ALL BNs	ALL BNs	N/A	N/A	N/A
F	N/A	N/A	ALL BNs	ALL BNs	N/A
G	N/A	N/A	N/A	N/A	ALL BNs
USARPAC	N/A	N/A	N/A	N/A	N/A
USAREUR	N/A	N/A	N/A	N/A	N/A

Training Battalion Schedule

Year 3 (1999, 2002, 2005)					
REGION	**CA**	**CS**	**CSS**	**HS**	**PROF DEV**
A	N/A	N/A	ALL BNs	ALL BNs	N/A
B	N/A	N/A	N/A	N/A	ALL BNs
C	ALL BNs	ALL BNs	N/A	N/A	N/A
D	N/A	N/A	ALL BNs	ALL BNs	N/A
E	N/A	N/A	N/A	N/A	ALL BNs
F	ALL BNs	ALL BNs	N/A	N/A	N/A
G	ALL BNs	ALL BNs	N/A	N/A	N/A
USARPAC	N/A	N/A	N/A	N/A	N/A
EUSAREUR	N/A	N/A	N/A	N/A	CGSC BNs

Leadership						
REGION	**98**	**99**	**00**	**01**	**02**	**03**
A			Accredit		N/A	Accredit
B		Accredit			Accredit	
C		Accredit			Accredit	
D		Accredit			Accredit	
E	Accredit			Accredit		
F	Accredit			Accredit		
G			Accredit			Accredit
USARPAC	N/A			Accredit		
EUSAREUR	N/A		Accredit			

***Note*:** AC schools will be accredited as part of their TASS region.

Accreditation Rules

c. The following rules apply to evaluating the Conduct of Training for accreditation:

(1) When instruction at all of a training institution's IDT locations cannot be evaluated due to personnel and/or fiscal constraints, the Proponent

will evaluate a statistically significant sample (which will be not less than 1/3 of the school battalion's IDT sites).

(2) All evaluated training sites must receive a first time "GO" to receive a training site accreditation. For failure to receive a first time "GO", see guidelines in Paragraphs "Accreditation Ratings/Standards" and "Actions Following Accreditation," this chapter. Training courses found deficient on a second visit, if required, will receive a non-accredit and remaining classes will be non-conducted in ATRRS. The process of non-conducting classes should be coordinated with the appropriate agency, TRADOC, NGB, or USARC. The remainder of the Training Battalion will receive an accreditation.

(3) All courses in session at a training site will be observed/evaluated.

(4) At least one course must be observed/evaluated to accredit an institution.

(5) At least one Annual Training will be evaluated during the year of accreditation.

(6) A training site's course or a training battalion's course that does not meet accreditation standards may be non-accredited and a training site or training battalion may still receive an accredit based on the status of its remaining courses. Only the subject matter expert may recommend a course to receive a non-accredit.

Accreditation Ratings/ Standards

d. Accreditation standards are as follows:

(1) The team chief recommends accreditation ratings based on---

(a) Input from the school battalion (Institutional Self Evaluation).

(b) Input from the RCE (Training Observation reports).

(c) Findings and recommendations of evaluators.

(d) The severity of the deficiencies and how they affect the Conduct of Training.

(e) The severity of the deficiencies and the effects they have on the soldiers' welfare, health, safety, and careers.

(2) In both major categories (Training Support and Conduct of Training) of the accreditation checklist, there are items identified as "critical." The team chief will consider results of critical items more heavily than non-critical items in making an accreditation recommendation. The appropriate accreditation rating is determined per the following Rating/Standard Table:

Rating	Standard
(a) Accredit	Accreditation of the school is authority to teach and verifies a TASS Training Battalion meets standards as established in applicable references and regulations.

(b) Withhold Accredita-tion	Withholding accreditation indicates that the institution has a significant problem or shortfall but that the Training/TD (Task) Proponent commandant believes that corrections can reasonably be implemented within 60 days or as determined by the proponent. 1 If one major category of the accreditation checklist receives an unsatisfactory rating, the team chief should strongly consider a recommendation to withhold accreditation. 2 When the Training/TD (Task) Proponent commandant withholds accreditation, it is withheld pending receipt of a satisfactory report of corrective actions from the school battalion commander. 3 This report is due to the accrediting authority within the prescribed time of the accrediting authority's official notification that accreditation is being withheld. 4 If corrective action is not or cannot be completed within the prescribed time, the training site/school battalion becomes non-accredited.
(c) Non-Accredit	Non-accredit indicates a TASS Training Battalion, regional training institute (RTI), or AC school has significant deficiencies or shortfalls and should not be teaching Army courses or a particular course. The team chief will strongly consider non-accreditation if one or more critical areas on any one checklist are determined to be a "NO GO" or three or more non-critical areas are a "NO-GO." The team chief will also determine if the cause for the non-accreditation rating is based on higher headquarters' issues. (See other paragraphs in this chapter for corrective action, provisions for follow-up evaluations, and procedures for accreditation reinstatement.

Actions Following Accreditation e. School and accrediting authority actions following an Accreditation, Withhold Accreditation, and Non-Accreditation:

Actions Following Accreditation (continued)

(1) **Accreditation**:

(a) Accrediting authority will issue a certificate of accreditation for those schools meeting accreditation standards.

(b) Schools may receive an accreditation and still have "NO GOs" on their accreditation checklists. They also may have deficiencies the accreditation team observed but were listed as "GOs" on the checklist because the school fixed the problems during the inspection. It is the school's responsibility to address these issues and insure the "NO GO" and corrected deficiencies do not recur in subsequent inspections. If the same deficiencies are found in the next inspection, they will be considered recurrent deficiencies. This is a critical area on the accreditation checklist.

(2) **Withhold Accreditation**:
(a) Accrediting authority will notify the school by memorandum of its accreditation being withheld. At that time it will become official that the school, if accredited previously, will have its accreditation rescinded.
(b) Accrediting authority will establish a suspense date for the school to provide a reply by endorsement (RBE) to the accrediting authority of corrective actions.
(c) Schools, upon receipt of a withhold accreditation memorandum, will reply by endorsement to the accrediting authority, in the time specified, the following:
1 Corrective actions taken by the school to prevent the recurrence of deficiencies for those items listed as "NO GOs" on the accreditation checklists.
2 Corrective actions taken by the school to ensure those checklist items where deficiencies were observed but the school fixed during the accreditation do not recur.
(d) If the accrediting authority, upon receipt of the RBE, is satisfied with the results of corrective actions, issue an accreditation certificate to the school.

(3) **Non-Accreditation**:
(a) The accreditation authority will notify the school by memorandum of non-accreditation. At that time, it will become official that the school, if accredited previously, will have its accreditation rescinded.
(b) The accreditation authority will schedule a follow-up evaluation at a time determined by the proponent after the school's receipt of the non-accreditation report. The accrediting authority will mail the memorandum via mail and contact the school by telephone to make preparations for a follow-up visit.
(c) The school will provide to the accreditation authority, 15 days prior to the follow-up visit, a RBE providing---
1 Corrective actions taken by the school to correct the deficiencies as "NO GOs" on the accreditation checklists.
2 Corrective actions taken by the school to ensure those checklist items, where deficiencies were observed but which the school fixed during the accreditation, do not recur.
(d) The accreditation authority will conduct a follow-up visit to inspect those courses or areas in the school that did not meet accreditation standards. It is not necessary to inspect those courses or areas of the school that met accreditation standards during the initial accreditation visit.
(e) The accreditation authority will issue an accreditation certificate to the school if it is found that the school corrected the deficiencies.

Withhold f. Withhold non-accreditation based on higher headquarters' issues (HHI):

Non-accreditation Based on HHI

(1) The accreditation authority may issue a withhold or non-accreditation of a school or course when the school is unable to meet training standards due to higher headquarters' issues.

(2) Schools must exhaust all efforts to rectify problems with higher headquarters. The efforts must be well documented.

(3) The accreditation authority will study the documented efforts of the school to fix its problems with the higher headquarters and make an accreditation determination.

(4) The following will take place should the accreditation authority determine that a school will receive a withhold or non-accreditation due to HHI.

(a) Issue a memorandum of withhold or non-accreditation to the school and furnish a copy to the higher headquarters involved.

(b) Coordinate with all parties involved with the school and higher headquarters to resolve the issues affecting the accreditation.

(c) Once the issues are resolved between the school, higher headquarters, and the accreditation authority, the school and accreditation authority will follow the actions outlined in Paragraph III-2-7e above.

Evaluation Results

g. Information on team chief guidance and packaging of evaluation results follows:

(1) For any school accredited, the packet of evaluation results will contain only one checklist for Training Support.

(2) For Conduct of Training, use a separate checklist for each course evaluated.

(3) The accreditation evaluation team chief makes the overall recommendation on whether to accredit, non-accredit, or withhold accreditation based on evaluation of the organization and courses taught. Input for team chief consideration should include---

(a) All evaluation checklists and comments.

(b) The school battalion's current ISE or Training Status Report (TSR).

(c) All TO reports since the previous accreditation.

In-Briefing, In-Process Review, and Out-Briefing

h. Active component TASS Training Battalions and OCONUS TASS Training Battalions will typically be evaluated for accreditation during a single week. For these evaluations, the team chief should conduct an in-briefing at the beginning, an in-process review (IPR) at about halfway through the evaluation week, and an out-briefing at the end. Further description of these events follow:

Event	Description
(1)In-briefing	The in-briefing will include--- (a) Introduction of accreditation team members. (b) Overview of accreditation ratings and standards for accreditation. (c) Tentative date, time, and location of the IPR. (d) Date, time, and location of the out-briefing.
(2)In-process Review	(a) The IPR will be conducted IAW a schedule agreed to by the team chief and the school battalion commander. (b) The purpose of the IPR is to inform the school battalion commander of the team's findings. (c) Each area should be briefed in detail so the commander knows

	exactly what is wrong/what corrective actions must be accomplished. (d) The IPR must allow the school battalion commander the opportunity to surface differences, issues, and problems. (e) The team chief will determine how to resolve differences, issues, and problems.
I (3)Out-briefing	(a) The out-briefing is a formal presentation of the accreditation team's findings and recommendations. It will include--- 1 The recommended accreditation rating. 2 Evaluation results for each of the two categories on the checklist. These findings will be briefed with any corrections made since the IDT Phase of the evaluation, if applicable. (b) **Required Corrective Actions**. If the recommended accreditation rating is Non Accredit or Withhold Accreditation, specify corrective measures the school must accomplish to be accredited.

Note: Evaluation visits to TASS schools in CONUS represent a small piece of the accreditation picture and do not require in- or out-briefings. The team chief may offer to conduct an IPR for the school battalion commander as a courtesy.

III-2-8. Report Format

Report Format

The accreditation report will be formatted IAW sample format in TR 351-18 and will contain the elements listed in the following table:

Paragraph	Title/Description
One	**Recommended Accreditation Rating**. This will be a simple statement of the recommended accreditation rating and listing of courses observed.
Two	**Other evaluation input**. Include source and location of other accreditation evaluations considered in this recommendation.
Three	**Strengths**. List significant strengths which merit general officer attention.
Four	**Shortcomings**. List major shortcomings . If the recommendation in paragraph one is to non-accredit or withhold accreditation, "Shortcomings" should immediately follow in the second paragraph.
Five	**Higher Headquarters' Issues**. Identify problems requiring corrective action by some agency beyond the control of the school battalion commander (e.g., TRADOC, Forces Command (FORSCOM), U.S. Army Europe (USAREUR), US Army Pacific (USARPAC), Eighth US Army (EUSA), USARC, NGB, TAG, Regional Support Command (RSC), RCE, etc.) Do not refer a problem to higher headquarters without having an audit trail clearly showing that the chain of command to the higher headquarters has been unable or unwilling to correct the problem.
Six	**General Comments**. Include anything that does not fall under the first four paragraphs. This could include problems which are not yet higher headquarters' issues but could become such if not soon resolved.
Seven	**Team Chief and Evaluators**. List names and ranks or titles.
Eight	**Point of Contact (POC)**. Provide the name and phone number of the Training/TD (Task) Proponent DOES point of contact.

III-2-9. Report Routing and Suspense

Interim and and Final Accreditation Reports

a. Interim and final accreditation report guidance is a follows:

(1) Interim Accreditation Reports	(a) Interim reports are required for IDT evaluations of TASS Training Battalions.
	(b) Upon completion of IDT evaluation, if the interim report indicates non-accreditation, the team chief will immediately send it to the appropriate addressees in the Report Distribution Table. For those that indicate accreditation, the report is forwarded to the school evaluated. All IDT evaluations are part of the accreditation report and will be distributed as outlined in the Report Distribution Table NLT 45 days upon completion of the accreditation visit.
	(c) The interim report will be mailed NLT 30 days after completion of the IDT visit.
(2) Final Accreditation Reports	(a) The Training/TD (Task) Proponent will process the accreditation report, commandant's letter of accreditation, and accreditation certificate.
	(b) The Training/TD (Task) Proponent commandant makes the final accreditation decision and signs the letter and the certificate.
	(c) The evaluation team chief furnishes a copy of the letter and the report to the addressees in the Report Distribution Table.

Report Distribution

b. Distribute the complete packet per the following Report Distribution Table:

The team chief of---	Sends the complete original packet to---	And furnishes a copy to---
AC NCOA in USAREUR	Commander, 7th Army Training Command	Commander, USAREUR and 7th Army Commander, TRADOC, ATTN: ATED
AC NCOA in USARPAC	Commander, 25th Infantry Division (Light)	Commander, USARPAC Commander, TRADOC, ATTN: ATED
AC NCOA in EUSA	Commander, EUSA, ATTN: EAJC-TD	Commander, TRADOC, ATTN: ATED
AC TRADOC NCOA	Commandant, Proponent School	Commander, TRADOC, ATTN: ATED
AC FORSCOM NCOA	Appropriate Corps, Division, or Brigade Commander	Commander, FORSCOM, ATTN: AFOP-TRI Commander, TRADOC, ATTN: ATED
AC Drill Sergeants School (DSS)	Installation Commander	Commander, TRADOC, ATTN: ATED
ARNG TASS school battalions	Commander of appropriate School Brigade	Director, Army National Guard, ATTN: NGB-ART-I (for ARNG school battalions) TAGs of the states involved in the accreditation (for ARNG school battalions) Regional TRADOC RCEs Appropriate DIV(IT) Commander, FORSCOM, ATTN: APOP-TI Commander, TRADOC, ATTN: ATED

Report Distribution (continued)

The team chief of---	Sends the complete original packet to---	And furnishes a copy to---
USAR TASS school battalions in CONUS and Puerto Rico	Commander of appropriate School Brigade	Chief, Army Reserve, ATTN: DAAR-OP-IT Commander, USARC, ATTN: AFRC-OPT-I Commander of appropriate Division (IT) Commander, FORSCOM, ATTN: AFOP-TI Commander, TRADOC, ATTN: ATED
USAR TASS school battalions OCONUS	Commander of appropriate School Brigade	Chief, Army Reserve, ATTN: DAAR-OP and one of the following: • Commander, USAREUR, (ATTN: AEAGC-T) (for Germany-based USAR school battalions), or • Commander, USARPAC, (ATTN: APOP-TR) (for Pacific-based USAR school battalions) Commander, TRADOC, ATTN: ATED

III-2-10. Corrective Actions

Corrective Actions After a Second Consecutive Non-accreditation

a. If a school's accreditation is rescinded and the school fails to meet accreditation standards during the follow-up evaluation, the accreditation authority will send a memorandum of non-accreditation through Commander, TRADOC to the appropriate command. Command staffs responsible for carrying the consequences of non-accreditation will receive a copy of the memorandum. The memorandum will advise them that the school (whose accreditation has been previously rescinded) failed to meet accreditation standards upon reevaluation. The memorandum will include the following:

(1) School's authority to teach TRADOC-approved proponent courses is withdrawn. Soldiers currently attending and who are in-processing to attend training may complete training.

(2) Proponent schools, ATSC, and other agencies will no longer provide training materials to the non-accredited school.

(3) NGB/USARC/Proponent/FORSCOM/USARPAC/USAREUR will non-conduct the remaining schedule classes in ATRRS. In case of a TASS region where one of the Region's RTIs failed to meet accreditation standards, when the ATRRS reflects a non-conduct of the remaining classes, the accreditation authority will provide a certificate of accreditation to the region. This authorizes the region to conduct training less the non-accredited RTI.

(4) HQ TRADOC (ATTN: ATED) will provide electronic notification of non-accreditation to the appropriate agencies and commands to ensure compliance with the above requirements.

(5) In instances where a proponent's school or course taught by the school receives a non-accreditation, DCSPER will accommodate soldiers to attend courses at other training sites authorized to teach the proponent's courses.

Procedures for Reinstatement of Accreditation

b. The following actions must happen for reinstatement accreditation and authorization to teach TRADOC-approved proponent courses:

(1) Commanders of non-accredited schools must request in writing, through command channels, an evaluation for reinstatement. The request must include the following:

(a) A detailed report of actions taken to correct all deficiencies.

(b) A list of not more than three courses the school proposes to conduct during the reinstatement evaluation. Schools that teach only one course, i.e., PLDC, will schedule one class with the minimum class size.

(c) Proposed course dates and request date for the reinstatement evaluation.

(d) If desired, a request for an assistance visit. Note: If requested, the assistance visit must take place a least 6 months prior to the reinstatement evaluation visit.

(e) An estimate of the number of students expected to enroll in each course.

(f) Coordination with NGB/USARC/Proponent/MACOMs to schedule up to no more than three classes for the purpose of reinstatement evaluation

(2) If the reinstatement evaluation request is approved, the accreditation authority will conduct an accreditation evaluation of all areas in Training Support and Conduct of Training, with particular emphasis on prior deficiencies.

(3) If the accreditation authority reinstates accreditation, all command and staffs previously notified of non-accreditation will receive a copy of the accreditation authority's Memorandum of Reinstatement of Accreditation. The memorandum will serve as the authority to rescind all adverse actions described herein. The memorandum will include the following:

(a) School's authority to teach the TRADOC-approved proponent courses is authorized.

(b) Proponent schools, ATSC, and other agencies will immediately begin to provide training materials to the school.

(c) GB/USARC/Proponent/FORSCOM/USARPAC/USAREUR will schedule the school's courses in ATRRS.

(d) HQ, TRADOC (ATTN: ATED) will provide electronic notification of accreditation reinstatement to the appropriate agencies and commands to ensure compliance with the above requirements.

(4) The adverse consequences of non-accreditation takes time and close coordination to rescind. When requesting a reinstatement accreditation, it is the responsibility of the commander of the non-accredited school (and the appropriate MACOM) to ensure availability of soldiers, instructors, course materials, training aids, equipment, and all other administrative, logistical, and service support required to conduct training and meet accreditation standards.

(5) Soldiers who attend courses conducted as part of a reinstatement effort will not suffer any consequences by the situation, regardless of the outcome of the reinstatement evaluation decision. Soldiers will graduate who successfully complete courses conducted during a reinstatement evaluation as though it were a normal course.
(6) Upon successful completion of a reinstatement evaluation, the accreditation authority will issue a certificate of accreditation to the school. In case of a region where one of the region's RTIs was excluded from the region's accreditation (ref Paragraph III-2-10a above), the accreditation authority will issue a new accreditation certificate accrediting the entire region.

Chapter III-3

Training Product/Material Validation

III-3-1. Chapter Overview

Introduction a. This chapter describes the training product/material validation process and provides guidance on conducting this validation.

Chapter Index b. This chapter covers the following:

Content	Paragraph
Administrative Information	III-3-2
Validation Description and Requirements	III-3-3

III-3-2. Administrative Information

Purpose a. Validation is a type of evaluation used to determine the efficiency and effectiveness of a new or revised training product/material in training the target audience to accomplish the established learning objectives. It is a quality control process.

References b. Required regulatory reference: other chapters this regulation:
(1) Chapter III-1, Evaluation and Quality Assurance Program Description and Requirements
(2) Chapter VI-8, Training Course Development

Definitions c. See the Glossary for TD-related terms. An understanding of the following terms is necessary for this chapter:
(1) Evaluation.
(2) Terminal learning objective.
(3) Enabling learning objective.

Responsibilities

d. See Appendix B, Responsibilities, for top-level TD-related responsibilities. Specific Training/TD (Task) Proponent responsibilities related to validation are as follows:

(1) Validate all training products/materials, to include, but not limited to, training courses; correspondence courses/subcourses; Interactive Multimedia Instruction (IMI); Training Aids, Devices, Simulators, and Simulations (TADSS); Armywide Doctrinal and Training Literature Program (ADTLP) products; audiovisual products; and job aids prior to reproducing, implementing, or distributing training.

Note: Resident course validation may be conducted during the first three iterations to save time and resources. Make every effort to include all procedures. However, non-resident DL course modules must be validated prior to reproduction and distribution.

(2) Validate all tests before they are implemented.

(3) Use validation feedback to improve training products/materials.

(4) Obtain command approval of validated products. See appropriate product chapter in this regulation for appropriate command approval authority.

III-3-3. Validation Description and Requirements

Description

a. Validation is the process used to determine if new/revised courses and training products/materials accomplish their intended purpose efficiently and effectively. It is the process used to determine if training accomplishes its intended purpose. Validation and revising training are continuous actions in the teaching/revising process of training improvement. Validation of products and materials involves ---

(1) Individual and/or group validation trials depending upon the nature of the training product.

(2) Verification of their training effectiveness in training the objective.

(3) Determination of beneficial improvements in the quality of training products and materials.

(4) Identification of training product deficiencies.

(5) Improvement of efficiency, effectiveness, and utility of training objectives, structure, sequence, products, and materials. In the "testing" context, it is the process of determining the degree of validity of a measuring instrument (e.g., skill qualification, end-of-module, and end-of-course comprehensive tests).

Note: Validation is of the training products themselves, **not** the training site.

Output

b. Validation of all training products is a **minimum essential requirement** of the SAT process. Required outputs are marked with an asterisk:

*(1) Validated and approved training materials and products.
*(2) Trained instructors and key personnel in the use of the validation training products/materials.
(3) Information useful to improving training products/materials.

Start point c. A training product/material validation is conducted just prior to preparing the camera ready copy (CRC).

Procedures d. Follow the steps in this table to validate and revise training products/materials.

Step	Action
(1)	Plan validation trials for all training products/materials, including tests. (a) Identify validation requirements. (b) Coordinate with validation location. (c) Ensure availability of --- 1 Personnel (See "Target Audience Sample," this chapter). 2 Appropriate target audience sample representation. See "Target Audience Sample" (this chapter). 3 Necessary space, facilities, and equipment availability. 4 Training products and materials. 5 Administrative support requirements. (d) Prepare personnel response forms, interview forms, and questionnaires.
(2)	Plan and conduct instructor and key personnel training (IKPT).
(3)	Conduct individual and/or group validation trials depending upon the nature of the training product.
(4)	Act on validation determination(s).

If you conduct	Then see..
Individual validation trials	"Individual Validation Trials" (this chapter).
Group validation trials	"Group Validation Trials" (this chapter).

Target Audience Sample e. The target audience sample is the group (of soldiers or civilians holding the particular job) used to validate the training products and materials. The target audience sample must consist of ---

(1) Soldiers or civilians with the prerequisites for the training.
(2) Non-performers of the training product objectives being validated.
(3) Total Army (Active and Reserve Component) receivers of the training/product.

Instructors and Key Personnel f. Active and Reserve Component instructors and key personnel assisting with validation procedures must be trained in use of the training products and materials for their respective areas. If these personnel are not trained, their inexperience with using and presenting the products may affect validation.

Individual Validation Trials

g. Individual trials pinpoint weaknesses and problems with training products and materials that need correcting before group trials are conducted. They are used to detect gross errors and inconsistencies before a statistical validation. To conduct individual trials, follow these steps:

Step	Action
(1)	Brief soldiers/civilians on their role in validation trials.
(2)	Implement the training with the target audience representation.
(3)	Observe individual use of training products and materials.
(4)	Determine necessary improvements through --- (a) Questionnaires. (b) Interviews. (c) Observation.
(5)	Make indicated corrections to training products and materials.

Group Validation Trials

h. Group trials are used to collect and analyze statistical data to statistically confirm the training effectiveness of the products and materials.

Step	Action	
(1)	Conduct fixed sample or sequential testing group validation method.	
	Fixed sample method	(a) Requires a sample target audience minimum of 30 soldiers/civilians. (b) Uses the scoring of the training product criterion-referenced test.
	Sequential testing method	(a) Requires 4 - 29 soldiers/civilians representing the target population. (b) Plots post-test results on a mathematically constructed grid.
(2)	Determine necessary improvements through analysis of the findings.	
(3)	Make indicated corrections to training products and materials.	

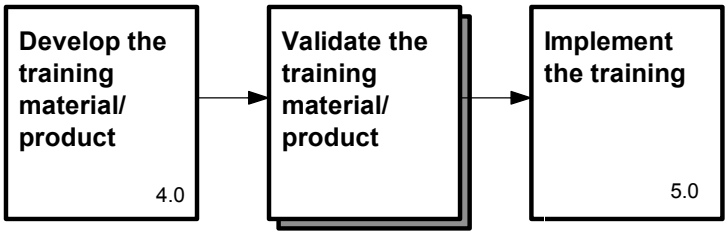
Process Completion

i. The validation is complete when the training program or product is determined to be valid and approved for implementation.

Note: Validation and revising training are continuous actions in the teaching/revising process of training improvement

Flow Diagram

j. The following flow diagram depicts the relationship between validation, product development, and product implementation.



Quality Control

k. For quality results from the validation process, all personnel involved must ensure ---
(1) Target audience is correctly sampled.
(2) The new/revised training product/material accomplishes its intended purpose efficiently and effectively.
(3) Action on validation results/findings.

Chapter III-4

Evaluating Instructor Performance

III-4-1. Chapter Overview

Introduction

a. This chapter provides criteria for evaluation of ---
(1) Basic instructor performance --- these criteria are required of all instructors regardless of the method or media used or the training site.
(2) Classroom instructor performance.
(3) Video teletraining (VTT) instructor performances.
(4) Small group instructor performances.
(5) Preparation for and conduct of the After Action Reviews (AAR).

Note: The reproducible checklists for each of these evaluations can be found at the back of this chapter.

Chapter Index

b. This chapter covers the following:

Content	Para Number
Instructor Evaluation Criteria - All Instructors	III-4-2
Basic Instructor Performance Checklist	III-4-3
Classroom Instructor Performance Checklist	III-4-4
Video Teletraining (VTT) Instructor Performance Checklist	III-4-5
Small Group Instructor Performance Checklist	III-4-6
After Action Review (AAR) Checklist	III-4-7

III-4-2. Instructor Evaluation Criteria – All Instructors

Basic Instructor Performance

a. The following criteria applies to all instructors regardless of whether the training is conducted in a traditional classroom, in a small group environment, or via video-teletraining. The Basic Instructor Performance Checklist can be found at paragraph number III-4-3. The checklist provides greater detail for evaluating these criteria. To meet acceptable performance standards, the instructor must ---

(1) Implement risk control measures.
(2) State Terminal Learning Objective.
(3) Demonstrate technical or tactical competence.
(4) Introduce the instruction.
(5) Present learning steps/actions.
(6) Explain the relationship of task or training activity to job performance.
(7) Generate questions/obtain feedback.
(8) Use training aids to support learning.
(9) Ensure that all students can see and hear all activities.
(10) Exhibit acceptable personal appearance.
(11) Demonstrate basic delivery skills.
(12) Use appropriate questioning techniques.
(13) Facilitate student performance.
(14) Exhibit respectful behavior.
(15) Provide interim and concluding summaries.
(16) Demonstrate effective management of training resources.
(17) Conduct AAR.

Classroom Instructor Performance

b. These additional criteria apply to instructors who are training in a classroom environment. The Classroom Instructor Performance Checklist can be found at Paragraph III-4-4. In addition to the basic instructor performances, the classroom instructor must ---

(1) Manage the training environment to promote learning, comfort, safety, and hygiene.
(2) Maintain a Visitors Folder in accordance with local policy.

VTT Instructor Performance

c. These additional criteria apply to instructors who are conducting training via VTT. The Video Teletraining (VTT) Instructor Performance Checklist can be found at Paragraph III-4-5. In addition to the basic instructor performances, the VTT instructor must ---

(1) Establish eye contact with the camera.
(2) Operate the media effectively.
(3) Develop and use effective visual aids.

Small Group Instructor Performance

d. These additional criteria apply to instructors who are conducting small group training. The Small Group Instructor Performance Checklist can be found at Paragraph III-4-6. In addition to the basic instructor performances, the small group instructor must ---

(1) Demonstrate the three small group roles.
(2) Facilitate the group during the Experiential Learning Cycle.

AAR Instructor Performance Checklist

e. These criteria apply to all instructors. The AAR Instructor Performance Checklist can be found at paragraph III-4-7. In addition to the basic instructor performances and any other appropriate criteria, the instructor must ---

(1) Prepare AAR outline.
(2) Prepare the training area for the AAR.
(3) Introduce the purpose for the AAR.
(4) Present training events for consideration.
(5) Facilitate student participation.

III-4-3. Basic Instructor Performance Checklist

Basic Instructor **Checklist**

To achieve a satisfactory rating, the instructor must receive a "GO" rating for Instructor Actions 1 through 3 and must receive no more that three (3) ratings of "NO-ChecklistGOs" for Instructor Actions 4 through 17.

Instructor Action	GO	NO-GO
1. Risk Control Measures ("a" through "d" required for a "GO" rating): a. Provided WARNINGS for training safety hazards. b. Identified high risk assessment level. c. Emphasized environmental hazards. d. STOPPED practice or testing when dangerous situation occurred.		
2. Terminal Learning Objective**:** Stated the action, conditions, and standard.		
3. Technical or Tactical Competence ("a" and "b" required for a "GO" rating): a. Responded to standard questions relating to objectives. b. Conducted demonstrations and exercises when appropriate.		
4. Introduction ("a" through "d" required for a "GO" rating): a. Used motivator. b. Explained --- (1) Difference between training and task performance on the job. (2) How performance will be tested. (3) Why task is important. (4) Risk assessment level. (5) Environment protection considerations. c. Defined new terms. d. Provided WARNINGS and CAUTIONS for training safety and job safety.		

5. Learning Steps/Actions ("a" through "f" required for a "GO" rating): a. Explained and/or replicated cues. b. Showed steps in parts. c. Asked questions. d. Explained key points. e. Covered material in lesson plan. f. Used --- (1) Logical sequence. (2) Smooth transitions.		
Job Performance Context: Explained relationship of task or training event to the performance soldier will carry out in the job environment.		
7. Questions and Feedback ("a" through "e" required for a "GO" rating): **a. Engaged students every 3 to 6 minutes.** b. Asked or answered questions. c. Stopped for discussion. d. Asked for feedback. e. Actively involved all students.		
8. Training Aids ("a" and "b" required for a "GO" rating): **a. Ensured training aids/equipment were operational** **b. Used ---** **(1) Training aids/training equipment properly.** **(2) Legible and appropriate visuals.**		
Instructor Action	GO	NO-GO
9. Facilitation of Student Ability to See and Hear ("a" and "b" required for a "GO" rating): a. Asked students if they could see and hear instruction. b. Corrected any identified situations where student was unable to see or hear instruction.		
10. Personal Appearance: Demonstrated well-groomed appearance, confident bearing, enthusiasm, no distracting mannerisms.		
11. Basic Delivery Skills: Used appropriate gestures, movement, communication skills (clear enunciation; appropriate speech volume, tone and rate; good grammar and choice of words with minimum "crutch" words.)		
12. Questioning Techniques: Conducted Ask-Pause-Call techniques (also called pose/pause/pounce) for conference and direct questioning during practice exercises or one-on-one questions.		

13. Facilitate Student Performance ("a" through "c" required for a "GO" rating): **a. Provided frequent 'checks on learning' and practice opportunities (usually over 50% for module or lesson prior to testing).** b. Conducted practice sessions that included-- (1) One best way (correct demonstrations). (2) Student activity that matched or closely modeled required job performance. (3) Practice in parts. (4) Shaping of student skills. (5) Specialized individual help when needed. (6) Answers to student questions. (7) On-the-spot correction and praise. (8) Immediate stopping of practice when dangerous situation occurred. c. Conducted performance tests that included --- (1) Preparation of test conditions. (2) Briefings to students. (3) Presentation of performance cues. (4) Observation of student performance without interruption except for intervention for safety purposes.		
Respectful Behavior: Displayed no signs of put downs, sarcasm, off-color material, or sexist/racist/ethnic remarks.		
Summaries of Instruction: Provided interim (when appropriate) and concluding summaries.		
16. Training Resource Management ("a" through "d" required for a "GO" rating): **a. Ensured availability of sufficient materials and resources.** b. Retained control of class. c. Managed disruptive students d. Used instructional time wisely.		
17. After-Action Review: Conducted AAR following field exercise, practical exercise, or testable module. *Note:* **The AAR Instructor Performance Checklist is at paragraph III-4-7.**		

III-4-4. Classroom Instructor Performance Checklist

Classroom Instructor Checklist

To achieve a satisfactory rating, the instructor must receive a "GO" rating for both Instructor Actions.

Instructor Action	GO	NO-GO
<u>Training Environment</u> ("a" through "j" required for a "GO" rating). Ensured classroom met safety, comfort, and hygiene standards, to include --- a. Ventilation. b. Lighting. c. Temperature. d. Noise levels. e. Interruptions. f. Visibly posted safety signs. g. Availability and use of safety equipment. h. Placement of observer station. i. Cleanliness. j. Adequate space for planned activities.		
2. <u>Visitors Folder</u>: Maintained Visitors Folder in accordance with local policy.		

III-4-5. Video Teletraining (VTT) Instructor Performance Checklist

VTT Instructor Checklist

To achieve a satisfactory rating, the VTT instructor must receive a "GO" rating for all three Instructor Actions.

Instructor Action	GO	NO-GO
<u>Eye Contact</u>: Established and maintained appropriate eye contact with main camera.		
2. <u>Operation of Media</u>: Exhibited fluent operation of VTT equipment.		
3. <u>Effective Visuals</u> ("a" through "e" required to receive "GO" rating). Developed and used visuals that --- a. Are legible. b. Relate to the objective. c. Exhibit consistent visual design. d. Display proper grammar and spelling. e. Conform to TV limitations.		

III-4-6. Small Group Instructor Performance Checklist

Small Group Instructor Checklist

To achieve a satisfactory rating, the small group instructor must receive a "GO" rating for both Instructor Actions.

Instructor Action	GO	NO-GO
1. <u>Small Group Roles</u> ("a" through "c" required for "GO" rating). Demonstrated --- a. Subject-Matter Expert (SME) Role. b. Facilitator Role. c. Observer Role.		
2. <u>Experiential Learning Cycle (ELC)</u> ("a" through "d" required for "GO" rating). Facilitated group in each ELC stage, to include --- a. Publishing Stage. b. Processing Stage c. Generalizing Stage. d. Applying Stage.		

III-4-7. After Action Review (AAR) Performance Checklist

AAR Performance Checklist

To achieve a satisfactory rating, the instructor conducting the AAR must receive a "GO" rating for ALL Instructor Actions.

Instructor Action	GO	NO-GO
1. <u>AAR outline</u>. Developed content outline.		
2. <u>Training Area preparation</u>. Prepared appropriate room or training area.		
3. I<u>ntroduction</u> ("a" through "c" required for "GO" rating). Stated --- a. AAR purpose. b. Training objective. c. Ground rules.		
4. <u>Presentation</u> ("a" through "c" required for "GO" rating). Presented chronological list of training events and facilitated student discussion of each event, to include the following --- a. What they observed. b. What went right (i.e., what was successful). c. What could/should be done differently.		

5. Facilitation ("a" through "d" required for "GO" rating): a. Asked questions which involved students and led them to clarify points. b. Listed points discussed for all to see. c. Summarized AAR highlights. d. Kept students focused on AAR activities and purpose.		

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Chapter 8:
Internal Evaluation

8-1 **Internal Evaluation Overview**

The purpose of this chapter is to provide "how-to" guidance for conducting internal evaluations. Internal Evaluations will cover the evaluation of:

- Overall Training Development Process
- Student Learning
- Instructional Materials
- Personnel
- Instructional Resources
- Implementation
- Training Products
- Staff and Faculty Education/Training
- Instructor Performance
- Infrastructure Requirements
- Accreditation (proponent schools, leader development, IET and TASS training battalions)

8-2 Internal Evaluation Description

The purpose of internal evaluation is to improve the quality and effectiveness of the instructional system by providing sufficient, high-quality data to decision makers upon which they can make sound, informed decisions about the training and education. During an internal evaluation, you gather internal feedback and management data from the education/training instructional system environment. Periodic internal evaluations may identify weaknesses/problems as well as strengths of the training development and instructional system.

This is a deeper requirement than checking instructor techniques and method of instruction. It is a check of the quality of the content as to what is being taught and what the students are assimilating. Comparisons should be made of the course objectives and standards applied in the training environment and the objectives and standards specified in course development documents. In addition, school's/center's control of the total training environment and promptness in moving graduates to units should be evaluated, to include proper application of the training development process.

Definition

a. Internal Evaluations provides the means to determine whether the training and training development efforts have accomplished what was intended. In other words, have the objectives of the training been met? Internal Evaluations also verify the effective use of the SAT process to meet minimum essential analysis, design, development, implementation and evaluation requirements. In other words, internal evaluations focus on the training development process, and the measurement of learning that was gained from the training program in an effort to continually improve instructional system quality and effectiveness.

Where Conducted

b. If you are conducting an internal evaluation on the application of the SAT process (i.e., analysis, design, development, and/or evaluation) then you will conduct the evaluation in the training development environment. The quality control (QC) checks outlined in the related TRADOC Pamphlets will assist you in accomplishing an evaluation of these areas. If you are conducting an internal evaluation of the implementation of training, then you will conduct the evaluation wherever the training is being implemented:

- Training institution
- TASS Training Battalion
- Distance Learning Facilities
- Unit
- Home

NOTE: Internal Evaluations is NOT conducted only within your resident school.

Objectives of Internal Evaluation

c. Internal evaluations should provide the school/decision makers with a method of assuring that the responsibilities of a systems approach to training are being faithfully executed. These responsibilities include ensuring:

(1) A systems approach is being appropriately applied to the analysis, design, development, implementation and evaluation of all training and training materials (i.e., products and/or programs).

(2) Records/documents are maintained that clearly explain the decision process.

(3) Analysts have interacted with school/center personnel charged to conduct the evaluation function to ensure that feedback data needs of analysis are expressed in evaluation plan.

(4) Training development and training functions are effective and efficient.

(5) Task inventories from new or modified equipment development process have been provided to appropriate office.

(6) Access to information from analysis of collective training requirements such as MTP and standard drills are available.

(7) Developing collective training programs including the appropriate MTP and standard drills that will support units/organizations for which they are proponent.

(8) Staff and faculty personnel receive training relevant to their duty assignment. As a minimum, staff and faculty training will consist of an introduction to a systems approach to training, and where appropriate, instructional techniques, demonstration techniques, and small group instruction techniques (i.e., they are certified).

(9) The instructional base is providing the appropriate/intended training and using the appropriate training products (i.e., POIs, lesson plans)

(10) Instructional system is producing the required qualified graduate effectively and cost-efficiently,

(11) Quality control mechanisms are in place for developing and implementing training and training products.

(12) Objectives of the training have been met.

(13) The infrastructure (e.g., training development facilities, classroom, shop areas, learning facilities, billets, training areas and ranges) adequately supports all phases of the SAT.

8-3 Procedures

Table 8-1 provides the general procedural guidance for conducting an internal evaluation. The “how-to” procedures for a majority of the steps below are discussed in depth in Chapters 3-7.

Table 8-1,
Internal Evaluation Procedures

No.	Steps
1.	Prepare internal Evaluation Project Management Plans
2.	Establish feedback channels
3.	Prepare modified checklists to evaluate products and processes
4.	Observe training and testing events
5.	Prepare and administer student, instructor and training manager questionnaires

6.	Analyze data or information and prepare evaluation reports
7.	Distribute evaluation reports
8.	Monitor compliance with recommendations
9.	Establish responsibilities for quality assurance and quality control

Project Management Plans

a. Plans to conduct an internal evaluation are detailed in Evaluation Project Management Plans. A guide for preparation of Evaluation Plans is provided in Chapter 3 of this pamphlet.

Feedback Channels

b. It is essential that a process be established that ensures feedback is being provided to the appropriate individuals/organizations. It is also imperative that feedback is constantly evaluated and applied to check and improve the training system. Feedback:

- Ensures training materials are maintained that reflect current doctrine, conditions, equipment, and procedures
- Ensures intended educational objectives have been met
- Provides feedback to students on individual performance
- Identifies substandard performance or trends as early as possible for individual assistance or corrective action
- Assesses the effectiveness of training and instructional methods used in training implementation.
- Provides information to base shifts in emphasis and allocation of scarce resources.

Checklists

c. Job Aids provide in Section 8-4 i below provide assistance in evaluating products and processes.

Observation

d. Observation techniques are discussed in Chapter 4 of this Pamphlet.

Questionnaires

e. Developing and administering questionnaires/surveys are discussed in detail in Chapter 4.

Analyze Data

f. Detailed guidance for analyzing data is provided in Chapter 5.

h. In addition to the procedures outlined in Chapter 5, an analysis of internal evaluation data should specifically include the following measures:

(1) Compare the POI with the course to determine if the planned and implemented courses are the same.

(2) Compare terminal and/or enabling objective standards with the standards in the POI to determine if the requirements of the POI are being met.

(3) Review the POI and instructional materials (i.e., lesson plans, instructor guides, student guides and other instructional materials) to see if they are current, adequate, and in agreement.

(4) Compare lesson plan with course being taught to determine if they are the same.

(5) Compare stated training resource requirements with actual resources to determine if adequate resources are available to support, operate, and/or maintain the instructional system.

(6) Review instructor records to ensure instructors are qualified to teach the POI.

(7) Review test and measurement data to determine if students are meeting the terminal and enabling objectives.

(8) Analyze test and measurement instruments to determine if individual items are valid and reliable.

(9) Employ QC checklists for the various training development phases.

Evaluation Reports

g. Results of data analyses should be provided to the appropriate elements within the school to influence the development process. Detailed guidance for preparing and distributing reports is provided in Chapter 6.

Follow-up

h. It is important that you determine if deficiencies identified during an internal evaluation have been corrected. The steps for conducting a follow-up evaluation are provided in Chapter 7.

8-4

Areas to Consider/Review During Internal Evaluation

Internal evaluation will assist in establishing and maintaining the desired level of quality assurance. Therefore, it is not excessive to have a system of in-process reviews of key areas. Depending on the circumstances and the directives of proponent evaluation policies and plans, the evaluator needs to review various documents/data during an internal evaluation. This will ensure all required data to conduct a successful internal evaluation is available. Some areas to consider are listed below:

Documentation To Review

a. A record of training needs assessment to determine if training is required or some other aspect of the installation/unit environment needs to be addressed, e.g.,

- Personnel management
- Maintenance and logistical support
- Equipment availability and operability

b. The specific target population description (developed during job analysis) to ensure training and training support materials is developed with the user in mind. Internal evaluations should check how well the analysis, design, development and implementation processes and products match the target population description and the needs of field users.

c. Records/documents and data sampled to determine compliance with HQ, TRADOC and local policy and guidelines. There are certain documentations of critical "decision points" in the training development process which internal evaluators should check as a minimum to see how well the decisions stand up to the tests of soundness of rationale and validity of selection. This may include, but not limited to:

- Critical task selection
- Training site selection
- Job performance measure description
- Training method and media selection
- Validation

d. Course control documents to determine if there are any discrepancies between the planned course and the course that was actually implemented. Each component and procedure authorized and (or) required by these documents should be studied.

e. Resource documents to ensure all required resources are available and sufficient. Recommended corrective actions should consider systems constraints. You need to ensure:

- Facilities (instructional and support) are available and adequate.
- Equipment and training devices (instructional, support, and test and measurement), and supplies are available and meet system requirements.
- Human resources (instructional developers, instructors, students, and courseware maintenance personnel) are available.

- There is adequate time allotted for the instruction (adequate course length and sufficient time to maintain the course).
- Adequate funds are available to support, operate, and maintain the course.

Other Areas **To Review**

The following describes several methods to use for collecting internal evaluations data.

f. Visit instructional facilities – Make enough visits of sufficient length and ensure you have a representative sampling to evaluate or check:

- The quality of implemented instruction. Ensure that the visit is long enough to observe samples of representative instruction for the entire course.
- Hardcopy instructional materials such as instructor and student guides, workbooks, and reference materials for quality and availability.
- Equipment, training devices, instructional media, and training aids for condition, operation, maintenance reliability, and appropriateness.
- Check instructional literature for availability and quality.

g. Evaluate instructor performance – Instructors must show acceptable application of instructional system technology and their activities should conform to those specified in the lesson plan. Instructor records must be current, and show amounts of in-service training and special training completed. You should ensure:

- The instructors follow the lesson plan and teach to the standard.
- The instructors use instructional media properly, detect student problems and respond to student needs, and are qualified to teach.
- The instructors' records are current and show required amount of in-service training and special training are completed.
- Noted weaknesses on instructor evaluation forms have been corrected.

h. Measurement (Testing Program) – You must establish that measurement programs are not compromised. If they are, the tests cannot provide useful data/feedback on student performance. You need to:

- Monitor the test and measurement program to ensure quality of the test and measurement items and student performance.

- Evaluate instruction in terms of student performance. Test and measurement instruments are the performance measures that determine student achievement of course objectives.

A satisfactory measurement program should

- Provide students and instructors with goals
- Inform each student of his/her progress in meeting program objectives
- Establish a permanent record of each student's achievement, and make it available to the student
- Identify any need for a remedial program.
- Identify students not meeting course standards, so appropriate action can be taken.
- Provide feedback data to establish a constant quality control check on the instructional system.

Note: Monitoring the measurement (test) program is very important in verifying instructional quality. But, it's just one aspect of internal evaluation. Don't exclude other aspects, such as visiting classrooms or checking equipment adequacy and audiovisual aids. Internal evaluation analyzes all actions that occur in system operation. If analysis spots sequences which are below standard, corrective action can be started. (As emphasized many times, corrective action may involve rework of earlier outputs from the SAT process.)

Job Aid i. JA 350-70-4.8a-8d, provides five checklists for conducting internal evaluations on the following functional areas:

- SAT Process (JA 350-70-4.8a)
- Training Institution (JA 350-70-4.8b)
- Products (JA 350-70-4.8c)
- Training Management (JA 350-70-4.8d)

8-5 Outputs of Internal Evaluations

Possible outputs of internal evaluations may include:

(1) Validated course developed IAW the STAT process; validated evaluation instruments

(2) Accredited training institutions

(3) Certified instructors; qualified evaluators and training developers

(4) Master Evaluation Plan and supporting TD Project Management Plans as required

(5) Elimination of or softening of some of the key procedures that are essential to efficient and effective training development and why.

- Contractual pressures to meet production milestone dates may be part of the cause and should be scrutinized and renegotiated.

8-6 Internal Evaluation Issues/Concerns

Possible Causes of Problems

a. Though an instructional system has been validated before implementation, students may still have difficulty with instruction during the day-to-day training. These possible problems need to be consistently reviewed and addressed by managers, training developers, and instructors as well as evaluators. Problems may include:

(1) Instructors do not follow the Program of Instruction (POI) or lesson plans

(2) The POI developed is different in some ways from the course being implemented

(3) Training resources that are required to support, operate and/or maintain the POI differ in some respects from the resources that have been allocated

(4) The training resources are inadequate for the student to master specific terminal or enabling objectives

(5) Training materials are not correlated with the test and measurement instruments, with the terminal or enabling objectives, or with the instructional content identified in the task and learning analyses.

(6) Students do not have the prerequisites required.

Managerial Questions

b. Competent management is key to an effective evaluation. Management has the overall responsibility for ensuring that all components of the evaluation are fully integrate. Internal evaluations are specifically focused to obtain answers to the questions “How good is the training?” Are students learning?” “Has the training development process been applied?” and “Do we need to change anything?” Questions that managers seek to answer via internal evaluations can be found at JA 350-70-4.8e.

8-7

Quality Control

TD/task proponents perform quality control actions as an inherent part of the SAT process. When conducting an internal evaluation, you must ensure:

- **Internal evaluation project management plan were prepared in a timely manner to impact the resource requirements.**
- Feedback channels were established that:
  a. Were accessible to units and school.
  b. Collected usable, pertinent data.
  c. Distributed evaluation results to appropriate organizations/personnel.
- Appropriate checklists were completed in support of the evaluation.
- As appropriate, training and testing events were observed and recommended improvements discussed with proponent.
- Questionnaires/interview were prepared and administered following the QC criteria in Chapter 4.
- Data was analyzed sufficiently to develop viable training/training development recommendations.
- Evaluation reports were prepared and distributed to appropriate organizations following the QC criteria in Chapter 6.
- Recommended improvements were thoroughly discussed with training/training development proponents.
- Follow-ups were conducted to verify that proponent took action on recommendations

TR Pam 350-70-4, Ch 9.

Chapter 9:
External Evaluation

9-1 External Evaluation Overview

The purpose of this chapter is to provide "how-to" guidance for conducting external evaluations. External Evaluation will cover the evaluations of education/training products used in the unit and the capability of soldiers to perform after receiving specified training.

9-2 **External Evaluation Description**

External Evaluation determines if soldiers can meet job performance requirements, need all the instruction they received and need any instruction they did not receive. This process gathers data from the field to assess graduate's on-the-job performance in a job environment and assess if the soldier can satisfy real world job performance requirements. Evaluators must realize that the responses to the surveys are opinions of supervisors/soldiers in a current peacetime environment in a specific unit configuration that may or may not relate to wartime or battlefield requirements. Likewise, it is important to compare what the field says is being done with regard to a particular task with what other documentation indicates should be done to support a particular unit mission and/or equipment configuration or operations capability.

Definition

a. External Evaluation is the evaluation process that provides the means to determine if the training received meets the needs of the operational Army. This evaluation ensures the system continues to effectively and cost-efficiently produce graduates who meet established job performance requirements. External evaluations can be considered a quality improvement operation, ensuring soldiers and training products continue to meet established job performance requirements as well as continually improve system quality.

Where Conducted

b. External evaluations gather data from the field to assess soldiers' on-the-job performance. A misconception often made is that external evaluations are anything conducted outside of the proponent schoolhouse. This is not true! External evaluations are conducted on soldiers and/or supervisors after the individual has graduated from a course and is performing their job/duty in the unit. Remember, the definition of an external evaluation is to determine if soldiers, who are recent graduates, can meet job performance requirements.

Objectives of External Evaluations

c. External evaluations assist in learning how well graduates meet job performance requirements. When conducting external evaluations, look for both strengths and weaknesses of the training system. External evaluations will help determine:

(1) How well the graduates are meeting job performance requirements.

(2) Whether training is being provided that is not needed.

(3) Whether any needed training is not being provided.

(4) Ways to improve the graduate's performance as well as the training system.

9-3 Procedures

a. Table 9-1 provides the general procedural guidance for conducting an external evaluation. This process relies on input from the job environment (field) to establish how well the soldiers are performing. Data is gathered and analyzed from outside the instructional environment. The "how-to" procedures for a majority of the steps below are discussed in-depth in Chapters 3-7.

Table 9-1,
External Evaluation Procedures

No.	Steps
1.	Prepare external evaluation project management plans
2.	Establish feedback channels
3.	Prepare visitation plans for observations and/or interviews
4.	Prepare statements of work for contracted studies
5.	Prepare survey instrument
6.	Collect and analyze data and information (i.e., questionnaires, field visits, and/or job performance evaluations)
7.	Prepare evaluation reports
8.	Distribute evaluation reports
9.	Monitor compliance with recommendations

9-4 Unit Training Evaluation

In the context of this pamphlet, when unit training evaluation is discussed, the focus of TRADOC proponents is on the training (and doctrinal) materials provided to support training in units; the purpose is NOT to evaluate the unit. The assessment of unit training and proficiency is and must remain a unit responsibility. However, TRADOC must work in close cooperation with the unit to provide the products (MTPs, STPs) necessary to support unit evaluation efforts. Evaluation of the education/training products used in the unit is critical to determine the effectiveness of collective and individual task performance and products. The intent of a training/education evaluation within the unit is to improve training and task performance proficiency.

Factors to Consider During an External Evaluation

a. A unit evaluation of education/training products (i.e., students, products, etc) may require one or several factors to be assessed to determine the effectiveness and efficiency. Such factors to consider include:

(1) Proponent's training programs and products.

(2) CALL trends.

(3) Feedback from units (i.e., commander)

(4) Responses provided to unit feedback.

(5) Feedback provided to training developers for needs analysis.

Combat Training Center Interface

b. Many proponent schools can no longer afford to send evaluation teams to units to evaluate the validity and effectiveness of training/training products. Therefore, CTCs have become a critical source of that information. The CTC Program provides highly realistic and stressful, joint, and combined arms training IAW Army and Joint doctrine. CTC rotations and reviews provide invaluable source of collective training feedback that may impact the determination of unit missions, critical collective tasks, and collective task analysis data used in the development of collective training products. Any feedback from CTCs should trigger the proponent to revisit analysis and product revisions. Evaluators should ensure:

(1) Training scenario missions and unit training products are tactically sound based on approved doctrine, and developed IAW all provision so TR 350-70 and the SAT process.

(2) Interface with CTCs to receive unit task training performance feedback that identify the need or requirement to develop or revise training scenario missions IAW TR 350-70 and the SAT process.

(3) Support of the TRADOC Remedial Action Program (T-RAP) (TR 11-13) by the conduct of detailed reviews of priority issues in an effort to determine solutions in all DTLOMS areas.

(4) CALL trends are being reviewed (provided by the CTCs CONOP collection efforts) and ensure application, as appropriate, lessons learned to training and doctrinal products.

Checklists

c. JA 350-70-4.9a provides assistance in conducting external evaluations.

9-5 Outputs of External Evaluations

Outputs of External Evaluations

a. Possible outputs of an external evaluations may include:

(1) Reports with identified deficiencies and corrective actions and follow-ups on identified deficiencies

(2) Efficient and effective individual and collective training, training programs, and products

(3) Needs assessment

(4) Use of data for improvement of trainee performance and revision of learning materials

9-6 External Evaluation Issues/Concerns

Possible Causes of Problems

Possible problems that may be identified during external evaluation include:

a. Criterion tests(s) do not measure graduates ability to meet job performance requirements.

b. Terminal or enabling learning objectives do not reflect job performance requirements.

c. Job performance requirements were incorrectly identified during job and task analyses.

d. Job performance requirement s changed after job and task analyses.

Managerial Questions

e. Competent management is key to an effective evaluation. Management has the overall responsibility for ensuring that all components of the evaluation are fully integrate. External evaluations are specifically focused to obtain answers to the questions “How good are our graduates and training support products” and “Do we need to change anything?” Questions that managers seek to answer via external evaluations can be found at JA 350-70-4.9b

9-7 Quality Control

TD/task proponents perform quality control actions as an inherent part of the SAT process. When conducting an external evaluation, you must ensure **--**

- External evaluation project management plan were prepared in a timely manner to impact the resource requirements.
- Feedback channels were established that:
  a. Were accessible to units and school.
  b. Collected usable, pertinent data.
  c. Distributed evaluation results to appropriate organizations/personnel.
- Appropriate checklists were completed in support of the evaluation.
- Questionnaires/interview were prepared and administered following the QC criteria in Chapter 4.
- Visitation plans were prepared and followed.
- Data was analyzed sufficiently to develop viable training/training development recommendations.
- Evaluation reports were prepared and distributed to appropriate organizations following the QC criteria in Chapter 6.
- Recommended improvements were thoroughly discussed with training/training development proponents.

Tab 43

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Standard 43 Reference Excerpts

TR 350-10,para 1-4g, Responsibilities. Commandant, U.S. Army Command and General Staff College (CGSC). The Commandant, CGSC—

(1) Serves as executive agent for Officer Education System (OES) common core, to include precommission tasks, to ensure officer training and education is progressive, sequential, and meets the needs of current and future officers. Monitors branch school compliance with common core training guidance.

TR 350-10, para 1-4k. Commandant, U.S. Army Sergeants Major Academy (USASMA). The Commandant, USASMA—

(1) Serves as executive agent for NCOES common core to ensure noncommissioned officer training and education is progressive, sequential, and meets the current and future needs of noncommissioned officers. Monitors branch school compliance with common core training guidance.

TR 350-10,para 1-4m. Commandants, Service Schools. Commandants—

(1) Analyze, design, develop, conduct, evaluate, and accredit officer, warrant officer, and noncommissioned officer training per AR 351-1 (to be superseded by AR 350-1), TRADOC Reg 350-70, TRADOC Reg 351-18 (Total Army School System (TASS)), and this regulation.

TR 350-10,para 2-7. Conduct of training.

Commandants will ensure training is conducted and evaluated per the principles listed in FM 25-100 (Training the Force) in conjunction with FM 25-101 (Battle Focused Training).

a. Schools will publish course prerequisites for each course in appropriate school catalogs, ATRRS, and student information packets. *Student qualification in prerequisite tasks is an individual and unit commander responsibility*.

b. Upon arriving at a school, students must be fully capable of performing supporting individual tasks and the tasks required in the next lower level course. Commandants may evaluate student capabilities through appropriate testing and if necessary, provide remedial training, recycle to a later class, or return to unit of assignment those students who do not meet course prerequisites or do not have the required minimum skills.

TR 350-70, III-1-4. DOES Roles.

a. The DOES (or functionally equivalent organization) is the “evaluator” of the Army’s training development process, instructors, training institutions, as well as training and training programs and products. DOES evaluation roles are described below.

Role	Activities
(1) Total Army Distance Learning Program Master Plan (TADLP-MP)	The DOES supports evaluation/quality assurance of the TADLP implementation. Program elements evaluated are as follows: (a) Student management (i.e., tracking of students through resident and DL course modules). (b) Scheduling of facilities, students, courseware, equipment, OPTEMPO, and other resource requirements. © Product management: 1 Test management/grading. 2 Appropriateness and effectiveness of courseware/media. 3 Development of products IAW TR 350-70, infrastructure standup, and TRADOC Technical Media Standards. (d) DL training and training management.
(2) Internal Evaluation Program	The DOES conducts internal evaluation of the following functional areas: SAT process, Individual Training and Education Process/ Program, training products, personnel (instructor evaluation/ certification; evaluator and training developer qualification), Training Institutions/facilities, conduct of needs assessments, and unit training. This evaluation --- (a) Ensures that training and training products are developed IAW the SAT process (i.e., as the result of a needs analysis and the training analysis, design, and development requirements in this regulation), which will result in efficient and effective training. (b) Ensures appropriate conduct of training/instruction and training transfer. © Involves evaluation of training products to determine their correctness, efficiency, and effectiveness. (d) Involves verification of certified instructors and qualified evaluators and training developers.
(3) External Evaluation	The DOES manages the school's outreach program to Active and Reserve Component units (i.e., unit evaluation), TASS Training Battalions, as well as non-resident instruction (i.e., non-resident DL). It involves the evaluation of instruction, training transfer, and training products. The prime focus of the program is to obtain feedback concerning the competency of graduates and effectiveness and utility of proponent products. The focus in the future will be on the effectiveness of DL and DL products. The primary modes of gathering information are through observation, structured interviews, and surveys/questionnaires. Resource constraints will require use of "distance evaluation" techniques (e.g., electronic mail, internet, or video teleconferencing) for interviews, surveys, and unit/CTC/CALL feedback.

TR 350-70, III-I-5, Evaluation Planning and Management.

Introduction a. Management of the Evaluation and Quality Assurance Program involves the use of planning documents, the development of data collection documents, evaluation of data analysis, and preparation of reports and back-up data.

Master Evaluation Plan (MEP) b. The Master Evaluation Plan is the Training/TD (Task) Proponent's overall strategy for accomplishing evaluation/QA functions and providing specific descriptions of programs. All school directorates and departments should participate in development of the Master Evaluation Plan since the plan must serve the feedback needs of all.

Note 1: See Chapter II-2, Training Development Workload and Resource Management, for additional management planning guidance.

Note 2: See Paragraph III-1-6, Master Evaluation Plan Specifications (this chapter), for MEP requirements.

TR 350-70, III-I-7 III-1-7. Evaluation Functional Areas

Requirements a. The evaluation function encompasses six major functional areas:

(1) SAT process.
(2) Individual Training and Education Process/Program.
(3) Products.
(4) Personnel.
(5) Training Institutions/Facilities.
(6) Needs Assessment.
(7) Unit Training

SAT Process b. Evaluation of the SAT process is to ensure that training products and materials are developed in compliance with TR 350-70 for analysis, design, development, format, submission, and fielding. The DOES is responsible for ensuring the commander/ commandant that the SAT process was followed and MERs were accomplished (to include affirmation of needs analysis or training strategy determination of a valid need for training/ training products). As a part of this function, DOES personnel:

(1) Participate as independent team members during the analysis, design, and development of training and training products and as non-voting members on boards and In-Process Reviews (IPRs) to ensure SAT requirements are met.
(2) Verify safety, risk assessment, and environmental protection measures have been considered throughout the TD process and incorporated into training products IAW Chapter I-2, Safety and Environment (this regulation).

Instructional Process/ Program c. Evaluation of the instructional process/program is critical to determine the effectiveness of courses of instruction for which the school has proponency. It is an independent determination of the quality of training and testing while concentrating on the actual presentation of instruction-presented and self-paced training, competency of instructors and examiners, relevance as well as adherence of course content to the training objectives, management and usability of DL training/training products, and training transfer.

(1) Instruction.

(a) Purpose. The purpose of instruction evaluation is to provide assistance and improve training. DOES evaluation will not impinge on the inherent responsibility of department directors for quality control of instruction. It is not the same as staff and faculty training development follow-up and consultation. The evaluation focus is on whether or not ---

1 DL and student management is effective and efficient.

2 The instructional environment (facilities; equipment; TADSS; ranges; FTX site; etc.) contributes to the learning experience.

III-1-7. Evaluation Functional Areas,

Instructional Process/ Program (Continued)

3 The instructor demonstrates competence in the tasks being taught and skill in instructional techniques appropriate for the method of instruction.

4 Instructors are aware of and have access to classified (as required) and unclassified sensitive CALL Gateway databases and other research materials, including the consolidated feedback from Army operations and training, to review the latest lessons available; they must also implement new tactics, techniques, and procedures (TTP) as appropriate.

5 Student learning is taking place through opportunities for interaction, such as questions and answers, role playing, student practice, testing, and after-action reviews (AARs), e.g., AARs after field training exercises.

6 A student critique system gives students the opportunity to freely make comments in writing and verbally about instruction and administrative support matters; proponent authorities should follow up on the input.

(b) Evaluation of student testing/performance measurement. Students must perform to standards and conditions prescribed in lesson plans/lessons. The DOES:

1 Students are tested to determine whether or not they can accomplish the Terminal Learning Objectives (TLOs).

Note 1: It is not the intent of this policy to have the QA activity (DOES) conduct testing.

Note 2: See Chapter VI-7, Student Performance Measurement/Testing.

2 Provides a selective, independent assessment of validity and suitability of resident and nonresident tests (e.g., distance learning material, etc).

3 Verifies tests have been reviewed/analyzed for reliability.

4 Verifies and provides comments on the quality of test construction and instructions to testers and students.

5 Determines if tests measure task performance to TLO standards.

6 Maintains statistics on test results to determine trends and provides feedback to departments on adequacy of tests and test items. Automated systems should provide test results, and all directorates, to include DOES, should have access to the data.

(c) Location: Evaluation of instruction may take place in various sites:

1 The Training/TD (Task) Proponent.

2 Army Education Center, Army Training Centers (ATCs) (in coordination with ATC QA elements), and DL classrooms.

3 TASS Training Battalions.

(2) Training transfer. Student success in performance, both during and after instruction/training, substantiates that instruction/training effectively trains the required critical tasks and supporting skills and knowledge. Evaluation of training transfer involves validation of transfer of learning to job/mission. The DOES will provide the Directorate of Training (or functionally equivalent organization) and departments input for their use in assessments of training needs and objectives, such as the difference between actual performance of individuals and units and performance to required standards Input may include ---

(a) Higher HQ, HQ TRADOC, CTC, Call, and IG evaluation indings.

(b) Issues from EXTEVs (survey and interview responses).

Products

d. Training product evaluation includes ---

(1) Evaluation of individual, collective, and self-development training products and literature for currency, usability, efficiency, effectiveness, doctrinal and technical correctness, and compliance with current Army/TRADOC policy and TRADOC Technical Media Standards.

(2) Verification that Training Requirement Analysis System (TRAS) documents meet requirements in Chapter II-8, TRAS (this regulation) as required.

(3) Training courses/instructional materials are of high quality, correctly reflect course design decisions, identify training objectives and performance standards, and appropriately illustrate and describe the material to be taught.

(4) Validation of courses, training products, and materials. Validation differs from evaluation in that validation is the process used by the training developer to determine if a new/revised training product/material accomplishes its intended purpose efficiently and effectively. The training proponent conducts individual and/or group trials, collects and analyzes validation data, and makes any necessary revisions to the training product/material.

Note: See Chapter III-3, Product/Material Validation, for policy and guidance on validation of training courses, products, and materials.

Personnel

e. Evaluation of personnel includes Instructor certification as well as Training Developer and Evaluator qualification. See the following references for respective policy and guidance:

(1) Instructor certification: Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs; and Chapter III-4, Evaluating Instructor Performance.

(2) Evaluator qualification: (See guidance in this chapter.)

(3) Training Developer qualification: Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs.

Training Institutions

f. Evaluation of DL will require assessment of DL classrooms and facilities to verify they meet TRADOC Classroom XXI Master Plan and TADLP-MP requirements to support DL. Also, TASS training institutions are evaluated in order to be accredited. See Chapter III-2, Total Army School System Accreditation Program, for policy and guidance in the accreditation of TASS training institutions.

Note: Some Training/TD (Task) Proponents go through the Council on Occupational Education to be accredited. Proponent accreditation should always be to the same standard as that of the TASS Training Battalions.

Needs Assessment

g. Needs assessment is a process of discovering weaknesses or potential problems for training or job/mission performance. It can be a ---

(1) Very *informal* assessment of training and the identification of a potential training or TD need to be confirmed by needs analysis (IAW Chapter IV-1, Needs Analysis).

(2) *Formal* process for the training impact analyses of emerging/new/displaced systems done as a part of the TEA Program. See appropriate references at the beginning of this chapter for TEA and TRADOC studies policy and guidance.

Unit Training

h. Unit training evaluation is the process used to identify collective and individual task performance and product deficiencies in unit training and to obtain recommendations for improvement of training or the products that support training. This evaluation involves both individual and unit training and doctrine products (e.g., soldier training publications [STPs]; mission training plans [MTPs]; drills; training support packages [TSPs]; training aids, devices, simulators, and simulations [TADSS]; field manuals [FMs]; training circulars [TCs]). Unit and training proponent evaluators determine the value, technical accuracy, and efficiency and effectiveness of the training, training programs, and products. The evaluators report deficiencies and recommendations for improvement to the training

proponent for conduct of a needs analysis. In effect, the proponent performs an external evaluation to identify deficiencies (and improvement recommendations) for subsequent needs analysis to determine the need to improve, eliminate, or replace the training or training products.

TR Pam 350-70-4, Ch 8.

Chapter 8:
Internal Evaluation

8-1 **Internal Evaluation Overview**

The purpose of this chapter is to provide "how-to" guidance for conducting internal evaluations. Internal Evaluations will cover the evaluation of:

- Overall Training Development Process
- Student Learning
- Instructional Materials
- Personnel
- Instructional Resources
- Implementation
- Training Products
- Staff and Faculty Education/Training
- Instructor Performance
- Infrastructure Requirements
- Accreditation (proponent schools, leader development, IET and TASS training battalions)

8-2 Internal Evaluation Description

The purpose of internal evaluation is to improve the quality and effectiveness of the instructional system by providing sufficient, high-quality data to decision makers upon which they can make sound, informed decisions about the training and education. During an internal evaluation, you gather internal feedback and management data from the education/training instructional system environment. Periodic internal evaluations may identify weaknesses/problems as well as strengths of the training development and instructional system.

This is a deeper requirement than checking instructor techniques and method of instruction. It is a check of the quality of the content as to what is being taught and what the students are assimilating. Comparisons should be made of the course objectives and standards applied in the training environment and the objectives and standards specified in course development documents. In addition, school's/center's control of the total training environment and promptness in moving graduates to units should be evaluated, to include proper application of the training development process.

Definition

a. Internal Evaluations provides the means to determine whether the training and training development efforts have accomplished what was intended. In other words, have the objectives of the training been met? Internal Evaluations also verify the effective use of the SAT process to meet minimum essential analysis, design, development, implementation and evaluation requirements. In other words, internal evaluations focus on the training development process, and the measurement of learning that was gained from the training program in an effort to continually improve instructional system quality and effectiveness.

Where Conducted

b. If you are conducting an internal evaluation on the application of the SAT process (i.e., analysis, design, development, and/or evaluation) then you will conduct the evaluation in the training development environment. The quality control (QC) checks outlined in the related TRADOC Pamphlets will assist you in accomplishing an evaluation of these areas. If you are conducting an internal evaluation of the implementation of training, then you will conduct the evaluation wherever the training is being implemented:

- Training institution
- TASS Training Battalion
- Distance Learning Facilities
- Unit
- Home

NOTE: Internal Evaluations is NOT conducted only within your resident school.

Objectives of Internal Evaluation

c. Internal evaluations should provide the school/decision makers with a method of assuring that the responsibilities of a systems approach to training are being faithfully executed. These responsibilities include ensuring:

(1) A systems approach is being appropriately applied to the analysis, design, development, implementation and evaluation of all training and training materials (i.e., products and/or programs).

(2) Records/documents are maintained that clearly explain the decision process.

(3) Analysts have interacted with school/center personnel charged to conduct the evaluation function to ensure that feedback data needs of analysis are expressed in evaluation plan.

(4) Training development and training functions are effective and efficient.

(5) Task inventories from new or modified equipment development process have been provided to appropriate office.

(6) Access to information from analysis of collective training requirements such as MTP and standard drills are available.

(7) Developing collective training programs including the appropriate MTP and standard drills that will support units/organizations for which they are proponent.

(8) Staff and faculty personnel receive training relevant to their duty assignment. As a minimum, staff and faculty training will consist of an introduction to a systems approach to training, and where appropriate, instructional techniques, demonstration techniques, and small group instruction techniques (i.e., they are certified).

(9) The instructional base is providing the appropriate/intended training and using the appropriate training products (i.e., POIs, lesson plans)

(10) Instructional system is producing the required qualified graduate effectively and cost-efficiently,

(11) Quality control mechanisms are in place for developing and implementing training and training products.

(12) Objectives of the training have been met.

(13) The infrastructure (e.g., training development facilities, classroom, shop areas, learning facilities, billets, training areas and ranges) adequately supports all phases of the SAT.

8-3 Procedures

Table 8-1 provides the general procedural guidance for conducting an internal evaluation. The “how-to” procedures for a majority of the steps below are discussed in depth in Chapters 3-7.

Table 8-1,
Internal Evaluation Procedures

No.	Steps
1.	Prepare internal Evaluation Project Management Plans
2.	Establish feedback channels
3.	Prepare modified checklists to evaluate products and processes
4.	Observe training and testing events
5.	Prepare and administer student, instructor and training manager questionnaires
6.	Analyze data or information and prepare evaluation reports

7.	Distribute evaluation reports
8.	Monitor compliance with recommendations
9.	Establish responsibilities for quality assurance and quality control

Project Management Plans

a. Plans to conduct an internal evaluation are detailed in Evaluation Project Management Plans. A guide for preparation of Evaluation Plans is provided in Chapter 3 of this pamphlet.

Feedback Channels

b. It is essential that a process be established that ensures feedback is being provided to the appropriate individuals/organizations. It is also imperative that feedback is constantly evaluated and applied to check and improve the training system. Feedback:

- Ensures training materials are maintained that reflect current doctrine, conditions, equipment, and procedures
- Ensures intended educational objectives have been met
- Provides feedback to students on individual performance
- Identifies substandard performance or trends as early as possible for individual assistance or corrective action
- Assesses the effectiveness of training and instructional methods used in training implementation.
- Provides information to base shifts in emphasis and allocation of scarce resources.

Checklists

c. Job Aids provide in Section 8-4 i below provide assistance in evaluating products and processes.

Observation

d. Observation techniques are discussed in Chapter 4 of this Pamphlet.

Question-naires

e. Developing and administering questionnaires/surveys are discussed in detail in Chapter 4.

Analyze Data

f. Detailed guidance for analyzing data is provided in Chapter 5.

h. In addition to the procedures outlined in Chapter 5, an analysis of internal evaluation data should specifically include the following measures:

(1) Compare the POI with the course to determine if the planned and implemented courses are the same.

(2) Compare terminal and/or enabling objective standards with the standards in the POI to determine if the requirements of the POI are being met.

(3) Review the POI and instructional materials (i.e., lesson plans, instructor guides, student guides and other instructional materials) to see if they are current, adequate, and in agreement.

(4) Compare lesson plan with course being taught to determine if they are the same.

(5) Compare stated training resource requirements with actual resources to determine if adequate resources are available to support, operate, and/or maintain the instructional system.

(6) Review instructor records to ensure instructors are qualified to teach the POI.

(7) Review test and measurement data to determine if students are meeting the terminal and enabling objectives.

(8) Analyze test and measurement instruments to determine if individual items are valid and reliable.

(9) Employ QC checklists for the various training development phases.

Evaluation Reports

g. Results of data analyses should be provided to the appropriate elements within the school to influence the development process. Detailed guidance for preparing and distributing reports is provided in Chapter 6.

Follow-up

h. It is important that you determine if deficiencies identified during an internal evaluation have been corrected. The steps for conducting a follow-up evaluation are provided in Chapter 7.

8-4

Areas to Consider/Review During Internal Evaluation

Internal evaluation will assist in establishing and maintaining the desired level of quality assurance. Therefore, it is not excessive to have a system of in-process reviews of key areas. Depending on the circumstances and the directives of proponent evaluation policies and plans, the evaluator needs to review various documents/data during an internal evaluation. This will ensure all required data to conduct a successful internal evaluation is available. Some areas to consider are listed below:

Documentation To Review

a. A record of training needs assessment to determine if training is required or some other aspect of the installation/unit environment needs to be addressed, e.g.,

- Personnel management
- Maintenance and logistical support
- Equipment availability and operability

b. The specific target population description (developed during job analysis) to ensure training and training support materials is developed with the user in mind. Internal evaluations should check how well the analysis, design, development and implementation processes and products match the target population description and the needs of field users.

c. Records/documents and data sampled to determine compliance with HQ, TRADOC and local policy and guidelines. There are certain documentations of critical "decision points" in the training development process which internal evaluators should check as a minimum to see how well the decisions stand up to the tests of soundness of rationale and validity of selection. This may include, but not limited to:

- Critical task selection
- Training site selection
- Job performance measure description
- Training method and media selection
- Validation

d. Course control documents to determine if there are any discrepancies between the planned course and the course that was actually implemented. Each component and procedure authorized and (or) required by these documents should be studied.

e. Resource documents to ensure all required resources are available and sufficient. Recommended corrective actions should consider systems constraints. You need to ensure:

- Facilities (instructional and support) are available and adequate.
- Equipment and training devices (instructional, support, and test and measurement), and supplies are available and meet system requirements.
- Human resources (instructional developers, instructors, students, and courseware maintenance personnel) are available.

- There is adequate time allotted for the instruction (adequate course length and sufficient time to maintain the course).
- Adequate funds are available to support, operate, and maintain the course.

Other Areas **To Review**

The following describes several methods to use for collecting internal evaluations data.

f. Visit instructional facilities – Make enough visits of sufficient length and ensure you have a representative sampling to evaluate or check:

- The quality of implemented instruction. Ensure that the visit is long enough to observe samples of representative instruction for the entire course.
- Hardcopy instructional materials such as instructor and student guides, workbooks, and reference materials for quality and availability.
- Equipment, training devices, instructional media, and training aids for condition, operation, maintenance reliability, and appropriateness.
- Check instructional literature for availability and quality.

g. Evaluate instructor performance – Instructors must show acceptable application of instructional system technology and their activities should conform to those specified in the lesson plan. Instructor records must be current, and show amounts of in-service training and special training completed. You should ensure:

- The instructors follow the lesson plan and teach to the standard.
- The instructors use instructional media properly, detect student problems and respond to student needs, and are qualified to teach.
- The instructors' records are current and show required amount of in-service training and special training are completed.
- Noted weaknesses on instructor evaluation forms have been corrected.

h. Measurement (Testing Program) – You must establish that measurement programs are not compromised. If they are, the tests cannot provide useful data/feedback on student performance. You need to:

- Monitor the test and measurement program to ensure quality of the test and measurement items and student performance.

- Evaluate instruction in terms of student performance. Test and measurement instruments are the performance measures that determine student achievement of course objectives.

A satisfactory measurement program should

- Provide students and instructors with goals
- Inform each student of his/her progress in meeting program objectives
- Establish a permanent record of each student's achievement, and make it available to the student
- Identify any need for a remedial program.
- Identify students not meeting course standards, so appropriate action can be taken.
- Provide feedback data to establish a constant quality control check on the instructional system.

Note: Monitoring the measurement (test) program is very important in verifying instructional quality. But, it's just one aspect of internal evaluation. Don't exclude other aspects, such as visiting classrooms or checking equipment adequacy and audiovisual aids. Internal evaluation analyzes all actions that occur in system operation. If analysis spots sequences which are below standard, corrective action can be started. (As emphasized many times, corrective action may involve rework of earlier outputs from the SAT process.)

Job Aid i. JA 350-70-4.8a-8d, provides five checklists for conducting internal evaluations on the following functional areas:

- SAT Process (JA 350-70-4.8a)
- Training Institution (JA 350-70-4.8b)
- Products (JA 350-70-4.8c)
- Training Management (JA 350-70-4.8d)

8-5 Outputs of Internal Evaluations

Possible outputs of internal evaluations may include:

(1) Validated course developed IAW the STAT process; validated evaluation instruments

(2) Accredited training institutions

(3) Certified instructors; qualified evaluators and training developers

(4) Master Evaluation Plan and supporting TD Project Management Plans as required

(5) Elimination of or softening of some of the key procedures that are essential to efficient and effective training development and why.

- Contractual pressures to meet production milestone dates may be part of the cause and should be scrutinized and renegotiated.

8-6 Internal Evaluation Issues/Concerns

Possible Causes of Problems

a. Though an instructional system has been validated before implementation, students may still have difficulty with instruction during the day-to-day training. These possible problems need to be consistently reviewed and addressed by managers, training developers, and instructors as well as evaluators. Problems may include:

(1) Instructors do not follow the Program of Instruction (POI) or lesson plans

(2) The POI developed is different in some ways from the course being implemented

(3) Training resources that are required to support, operate and/or maintain the POI differ in some respects from the resources that have been allocated

(4) The training resources are inadequate for the student to master specific terminal or enabling objectives

(5) Training materials are not correlated with the test and measurement instruments, with the terminal or enabling objectives, or with the instructional content identified in the task and learning analyses.

(6) Students do not have the prerequisites required.

Managerial Questions

b. Competent management is key to an effective evaluation. Management has the overall responsibility for ensuring that all components of the evaluation are fully integrate. Internal evaluations are specifically focused to obtain answers to the questions "How good is the training?" Are students learning?" "Has the training development process been applied?" and "Do we need to change anything?" Questions that managers seek to answer via internal evaluations can be found at JA 350-70-4.8e.

8-7

Quality Control

TD/task proponents perform quality control actions as an inherent part of the SAT process. When conducting an internal evaluation, you must ensure:

- **Internal evaluation project management plan were prepared in a timely manner to impact the resource requirements.**
- Feedback channels were established that:
  d. Were accessible to units and school.
  e. Collected usable, pertinent data.
  f. Distributed evaluation results to appropriate organizations/personnel.
- Appropriate checklists were completed in support of the evaluation.
- As appropriate, training and testing events were observed and recommended improvements discussed with proponent.
- Questionnaires/interview were prepared and administered following the QC criteria in Chapter 4.
- Data was analyzed sufficiently to develop viable training/training development recommendations.
- Evaluation reports were prepared and distributed to appropriate organizations following the QC criteria in Chapter 6.
- Recommended improvements were thoroughly discussed with training/training development proponents.
- Follow-ups were conducted to verify that proponent took action on recommendations

TR Pam 350-70-4, Ch 9.

Chapter 9:
External Evaluation

9-1 External Evaluation Overview

The purpose of this chapter is to provide “how-to” guidance for conducting external evaluations. External Evaluation will cover the evaluations of education/training products used in the unit and the capability of soldiers to perform after receiving specified training.

9-2 **External Evaluation Description**

External Evaluation determines if soldiers can meet job performance requirements, need all the instruction they received and need any instruction they did not receive. This process gathers data from the field to assess graduate’s on-the-job performance in a job environment and assess if the soldier can satisfy real world job performance requirements. Evaluators must realize that the responses to the surveys are opinions of supervisors/soldiers in a current peacetime environment in a specific unit configuration that may or may not relate to wartime or battlefield requirements. Likewise, it is important to compare what the field says is being done with regard to a particular task with what other documentation indicates should be done to support a particular unit mission and/or equipment configuration or operations capability.

Definition

a. External Evaluation is the evaluation process that provides the means to determine if the training received meets the needs of the operational Army. This evaluation ensures the system continues to effectively and cost-efficiently produce graduates who meet established job performance requirements. External evaluations can be considered a quality improvement operation, ensuring soldiers and training products continue to meet established job performance requirements as well as continually improve system quality.

Where Conducted

b. External evaluations gather data from the field to assess soldiers’ on-the-job performance. A misconception often made is that external evaluations are anything conducted outside of the proponent schoolhouse. This is not true! External evaluations are conducted on soldiers and/or supervisors after the individual has graduated from a course and is performing their job/duty in the unit. Remember, the definition of an external evaluation is to determine if soldiers, who are recent graduates, can meet job performance requirements.

Objectives of External Evaluations

c. External evaluations assist in learning how well graduates meet job performance requirements. When conducting external evaluations, look for both strengths and weaknesses of the training system. External evaluations will help determine:

(1) How well the graduates are meeting job performance requirements.

(2) Whether training is being provided that is not needed.

(3) Whether any needed training is not being provided.

(4) Ways to improve the graduate's performance as well as the training system.

9-3 Procedures

a. Table 9-1 provides the general procedural guidance for conducting an external evaluation. This process relies on input from the job environment (field) to establish how well the soldiers are performing. Data is gathered and analyzed from outside the instructional environment. The "how-to" procedures for a majority of the steps below are discussed in-depth in Chapters 3-7.

Table 9-1,
External Evaluation Procedures

No.	Steps
1.	Prepare external evaluation project management plans
2.	Establish feedback channels
3.	Prepare visitation plans for observations and/or interviews
4.	Prepare statements of work for contracted studies
5.	Prepare survey instrument
6.	Collect and analyze data and information (i.e., questionnaires, field visits, and/or job performance evaluations)
7.	Prepare evaluation reports
8.	Distribute evaluation reports
9.	Monitor compliance with recommendations

9-4 Unit Training Evaluation

In the context of this pamphlet, when unit training evaluation is discussed, the focus of TRADOC proponents is on the training (and doctrinal) materials provided to support training in units; the purpose is NOT to evaluate the unit. The assessment of unit training and proficiency is and must remain a unit responsibility. However, TRADOC must work in close cooperation with the unit to provide the products

(MTPs, STPs) necessary to support unit evaluation efforts. Evaluation of the education/training products used in the unit is critical to determine the effectiveness of collective and individual task performance and products. The intent of a training/education evaluation within the unit is to improve training and task performance proficiency.

Factors to Consider During an External Evaluation

a. A unit evaluation of education/training products (i.e., students, products, etc) may require one or several factors to be assessed to determine the effectiveness and efficiency. Such factors to consider include:

(1) Proponent's training programs and products.

(2) CALL trends.

(3) Feedback from units (i.e., commander)

(4) Responses provided to unit feedback.

(5) Feedback provided to training developers for needs analysis.

Combat Training Center Interface

b. Many proponent schools can no longer afford to send evaluation teams to units to evaluate the validity and effectiveness of training/training products. Therefore, CTCs have become a critical source of that information. The CTC Program provides highly realistic and stressful, joint, and combined arms training IAW Army and Joint doctrine. CTC rotations and reviews provide invaluable source of collective training feedback that may impact the determination of unit missions, critical collective tasks, and collective task analysis data used in the development of collective training products. Any feedback from CTCs should trigger the proponent to revisit analysis and product revisions. Evaluators should ensure:

(1) Training scenario missions and unit training products are tactically sound based on approved doctrine, and developed IAW all provision so TR 350-70 and the SAT process.

(2) Interface with CTCs to receive unit task training performance feedback that identify the need or requirement to develop or revise training scenario missions IAW TR 350-70 and the SAT process.

(3) Support of the TRADOC Remedial Action Program (T-RAP) (TR 11-13) by the conduct of detailed reviews of priority issues in an effort to determine solutions in all DTLOMS areas.

(4) CALL trends are being reviewed (provided by the CTCs CONOP collection efforts) and ensure application, as appropriate, lessons learned to training and doctrinal products.

Checklists

c. JA 350-70-4.9a provides assistance in conducting external evaluations.

9-5 Outputs of External Evaluations

Outputs of External Evaluations

a. Possible outputs of an external evaluations may include:

(1) Reports with identified deficiencies and corrective actions and follow-ups on identified deficiencies

(2) Efficient and effective individual and collective training, training programs, and products

(3) Needs assessment

(4) Use of data for improvement of trainee performance and revision of learning materials

9-6 External Evaluation Issues/Concerns

Possible Causes of Problems

Possible problems that may be identified during external evaluation include:

a. Criterion tests(s) do not measure graduates ability to meet job performance requirements.

b. Terminal or enabling learning objectives do not reflect job performance requirements.

c. Job performance requirements were incorrectly identified during job and task analyses.

d. Job performance requirement s changed after job and task analyses.

Managerial Questions

e. Competent management is key to an effective evaluation. Management has the overall responsibility for ensuring that all components of the evaluation are fully integrate. External evaluations are specifically focused to obtain answers to the questions “How good are our graduates and training support products” and “Do we need to change anything?” Questions that managers seek to answer via external evaluations can be found at JA 350-70-4.9b

9-7 Quality Control

TD/task proponents perform quality control actions as an inherent part of the SAT process. When conducting an external evaluation, you must ensure **--**

- External evaluation project management plan were prepared in a timely manner to impact the resource requirements.

- Feedback channels were established that:
  a. Were accessible to units and school.
  b. Collected usable, pertinent data.
  c. Distributed evaluation results to appropriate organizations/personnel.
- Appropriate checklists were completed in support of the evaluation.
- Questionnaires/interview were prepared and administered following the QC criteria in Chapter 4.
- Visitation plans were prepared and followed.
- Data was analyzed sufficiently to develop viable training/training development recommendations.
- Evaluation reports were prepared and distributed to appropriate organizations following the QC criteria in Chapter 6.
- Recommended improvements were thoroughly discussed with training/training development proponents.

Tab 44

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Standard 44 Reference Excerpts

TR 350-70, I-1-5, Copyright/Proprietary Materials.

Requirements Copyright and proprietary material can be used in the development and implementation of training programs, products, and materials provided the appropriate written authority/permission is obtained from the property owner prior to using the material. As a general rule, it is a violation of law to use copyright and proprietary material without this permission. Use of a copyrighted work by the Army without permission of the owner must be approved by the Intellectual Property Counsel of the Army (per AR 27-60). Unless it is specified in the agreement with the owner that you have unlimited usage/distribution rights, proprietary material can not be used carte blanche. This applies to, but is not limited to, written material, graphics, video, development programs, and IMI products. You should ---

(1) Determine if the material you want to use in the training is copyrighted or proprietary. Proprietary or copyrighted materials will contain an appropriate restrictive legend or copyright notice. The copyright mark or restrictive legend would appear in the front of any copyrighted/restrictive text.

(2) Include SJA in your staffing procedures prior to buying any proprietary materials for inclusion in training products/materials and consult with them to ---

(a) Review/determine your rights concerning the use of existing proprietary materials for training purposes and the need to obtain approval for use in courseware.

(b) Review any site license purchased or about to be purchased and render a decision on your rights.

(3) Acquire acquisition of the rights necessary to maximize your investment of proprietary programs/materials before designing and implementing the training program. This includes ---

(a) Obtaining royalty-free rights to use, duplicate, and disclose data for government purposes.

(b) Obtaining unlimited rights to the IMI (CBI) to the extent authorized by the Federal Acquisition Regulation.

Note: Violation of site license agreements may have serious legal consequences.

(c) Ensuring life cycle availability of any authoring program.

(d) Obtaining all associated software libraries and materials necessary to design/revise the training product, e.g., IMI (CBI).

(4) Review all printed materials which have been or are to be placed in the digital library or in other digitally delivered formats to determine if any copyright protected material is contained. If any copyright protected material is present, contact the owner of the material and request permission to use the material in a document or program placed on the Internet or delivered by other digital means (e.g., CD-ROM, DVD). *The original copyright release granted for printed materials is not sufficient*

as permission must be obtained for the specific use of the material delivered via the Internet or by other digital means (CD-ROM, DVD).

(a) If permission **is** granted, the permission document must be placed on permanent file.

(b) If permission **is not** granted, the material must be extracted from the document before it is placed on the Internet.

(5) Maintain a record copy of any document that grants permission/authority to use the proprietary material.

Note: Helpful copyright internet sites:

Copyright Clearance Center: www.copyright.com

US Patent And Trademark Office: www1.uspto.gov

U.S. Copyright Office, Library of Congress: lcweb.loc.gov/copyright

Tab 45

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TR 350-70, Part III.

Part III

Evaluation and Quality Assurance

III-0. Part Overview

Purpose a. Part III provides policy governing the Evaluation and Quality Assurance Program of the U.S. Army Training and Doctrine Command (TRADOC). This is TRADOC's application of the quality assurance principles of FM 25-100, Training the Force, and the evaluation function of the Systems Approach to Training (SAT) process. It covers evaluation/quality assurance of the training, products, and institutions that present the training. Also covered is accreditation of training institutions, training product/material validation, and instructor checklists.

Applicability b. Part III of this regulation applies to all Total Army School System (TASS) schools, both Active and Reserve Component.

Part Index c. This part covers the following:

Chapter Number	Content
III-1	Evaluation and Quality Assurance Program Description and Requirements
III-2	Total Army School System Accreditation Program
III-3	Product/Material Validation
III-4	Evaluating Instructor Performance

Note: Throughout Part III, DOES refers to Directorate of Evaluation and Standardization or functionally equivalent organization which implements these measures for the proponent school commandant.

Chapter III-1
Evaluation and Quality Assurance Program Description and Requirements

III-1-1. Chapter Overview

Introduction a. Evaluation is the cornerstone of quality training. Implementation of Army Training XXI (ATXXI) and the return on investment of major resource investments in Total Army Training System (TATS) Courses, the Total Army Distance Learning Program (TADLP), and accreditation of Total Army School System (TASS) training institutions heighten the criticality of having training products that are efficient and effective and in compliance with Department of the Army (DA) and TRADOC policy and guidance.

Criticality increases due to outsourcing of much of the training development (TD) workload, especially multimedia development.

Chapter Overview

b. This chapter describes the TRADOC Evaluation and Quality Assurance Program and establishes roles, responsibilities, and requirements. The Training Development Analysis Activity (TDAA), ODCST, serves as the Program Manager (PM) for the entire TRADOC Evaluation and QA Program, representing the DCST and CG, TRADOC. The Deputy Chief of Staff for Education (DCSED) is the proponent for the accreditation functional area.

Note 1: The roles, functions, and responsibilities referred to in this chapter for the Directorate of Evaluation and Standardization (DOES) apply to functionally equivalent organizations operating under a different name.

Note 2: This chapter provides policy and guidance for the overarching Evaluation and QA Program. See other chapters for additional guidance in specific functional areas:

- TASS training institution accreditation: Chapter III-2, Total Army School System Accreditation Program
- Product validation: Chapter III-3, Product/Material Validation
- Instructor certification and checklists: Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs; Chapter III-4, Evaluating Instructor Performance.

Chapter Index

c. This chapter covers the following:

Content	Paragraph
Administrative Information	III-1-2
Description and Requirements	III-1-3
DOES Roles	III-1-4
Evaluation Planning and Management	III-1-5
Master Evaluation Plan (MEP) Specifications	III-1-6
Evaluation Functional Areas	III-1-7
Evaluator Training and Qualification	III-1-8

III-1-2. Administrative Information

Purpose

a. The Evaluation and QA Program ---

(1) Ensures implementation of training and TD programs, processes, products, and guidance (to include the TADLP and TASS training materials) required in DA and TRADOC regulations.

(2) Provides support to decision makers at all levels through the collection, analysis, and distribution of user feedback concerning ---

(a) Quality of training and training products.

(b) Training of current doctrine.

(c) Assessment of student learning.

Purpose **(Continued)**

(d) Training impact and effectiveness analyses of emerging/new/displaced equipment/systems as well as training aids, devices, simulators, and simulations (TADSS).

(3) Assesses performance deficiencies and successful initiatives (lessons learned) from the collection and analysis of trend data.

(4) Includes standards and guidance for accrediting Army training institutions, certifying instructors, and qualifying training developers and evaluators.

(5) Enhances the crosswalk between doctrinal, combat, and training development in support of the Requirements Determination and Acquisition Process.

References b. Required references and internet addresses are as follows:

Regulatory:

(1) AR 5-5, Army Studies and Analyses
(2) Army Reg 351-1, Individual Military Education and Training
(3) Army Reg 600-46, Attitude and Opinion Survey Program
(4) TR 5-3, The U. S. Army Training and Doctrine Command (TRADOC) Study Program
(5) TR 11-8, TRADOC Studies and Analyses
(6) TR 11-13, TRADOC Remedial Action Program (T-RAP)
(7) TR 350-16, Drill Sergeant Program
(8) TR 350-32, The TRADOC Training Effectiveness Analysis (TEA) System
(9) TR 351-10, Institutional Leader Education and Training
(10) TR 351-18, Total Army School System (TASS)
(11) Other chapters, this regulation:
  (a) Chapter I-2, Safety and Environment
  (b) Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs
  (c) Chapter II-8, TRAS
  (d) Chapter III-2, Total Army School System Accreditation Program
  (e) Chapter III-3, Product/Material Validation
  (f) Chapter III-4, Evaluating Instructor Performance
  (g) Chapter IV-1, Needs Analysis
  (h) Chapter V-8, CTC TD Interface
  (i) Chapter VI-7, Student Performance Measurement/Testing.

Note: See **all** other chapters for minimum essential requirements (MERs).

Procedural:

(1) FM 25-100, Training the Force
(2) FM 25-101, Battle Focused Training
(3) CG TRADOC “Black Book” Requirements Determination
(4) TRADOC Pam 71-9, Requirements Determination

Internet:

(1) Army Doctrine and Training Digital Library: http://www.adtdl.army.mil
(2) Center for Army Lessons Learned (CALL) Internet Gateway: http://call.army.mil:1100/call.htm
(3) CALL SIPRNET (classified) Gateway: http://199.123.114.194:1100
(4) TRADOC Technical Media Standards: http://www.atsc.army.mil/dld/standard.htm

Definitions

c. See Glossary for other TD and program-related terms.

Non-resident training. Training presented to students that is not instructor/facilitator-led and does not take place in residence, e.g., it takes place in Army learning centers, distance learning (DL) classrooms, and student residences. Instruction is self-paced.

Resident training. Training presented, managed, and controlled by an on-site instructor or facilitator, small-group leader, or otherwise designated trainer.

TASS Training Battalions. TASS Training Battalions comprise all NCOAs and schools of the Reserve Components and are functionally aligned with the appropriate Training/TD (Task) Proponents.

Total Army School System (TASS). A composite school system comprised of the AC, ARNG, and USAR institutional training systems. The TASS, through the Army's training proponents, provides standard training courses to America's Army, focusing on three main points of effort --- standards, efficiencies, and resources. The TASS is composed of accredited and integrated AC/ARNG/USAR schools that provide standard institutional training and education for the Total Army. The TASS training battalions are arranged in regions and functionally aligned with the Training/TD (Task) Proponents. (TR 351-18)

Responsibilities

d. See Appendix B, Responsibilities, for top-level responsibilities. Evaluation and QA Program-specific responsibilities are as follows:

Note: Each organization has specific responsibilities for providing both generic and branch unique assistance for its programs within the TASS. The Evaluation and QA Program does not modify existing command and control relationships.

Organization	Responsibilities
(1) CG, TRADOC ICW CG, Medical Command and CG, U.S. Army Special Operations Command	(a) Develops policy, standards, and procedural guidance governing the Evaluation and Quality Assurance Program. (b) Conducts Inspector General (IG) studies evaluating the training/TD processes and products to ensure meeting of the MERs in this regulation. (c) Provides funding and manpower for the QA Program.

(2) HQ TRADOC, Deputy Chief of Staff for Training	(a) Serves as the proponent/PM for the TRADOC Evaluation and Quality Assurance Program, representing the DCST and CG, TRADOC. (b) Establishes an Evaluation and Quality Assurance Program office and Program Manager to manage the Evaluation and QA Program to ensure implementation of training and TD programs, processes, and guidance required in DA and TRADOC regulations. Staff oversight involves periodic on-site visits to proponent schools to assess the functional areas and compliance of MERs listed in this regulation. (c) Assigns an Evaluation and QA Program Desk Officer to each proponent school, Army Management Staff College, John F. Kennedy Special Warfare Center, Academy of Health Sciences, Judge Advocate General's School, NGB, FORSCOM, and USARC to assist in executing evaluation and QA programs. (d) Manages and coordinates training effectiveness analyses (TEAs) and other special training studies with the Army Science Board, TRADOC Analysis Center (TRAC), Army Research Institute (ARI), Deputy Chief of Staff for Analysis, RAND Arroyo Center, and Training/TD (Task) Proponents as required. (e) Supports and participates as required in IG studies. (f) Establishes qualification requirements for training developers and evaluators. (g) Provides Army representative and chairs the Evaluation Subcommittee of the Interservice Training Review Organization (ITRO) as required; participates in ITRO and Joint reviews as required.
(2) HQ TRADOC, Deputy Chief of Staff for Training (continued)	(h) Analyzes higher HQ, HQ TRADOC, Combat Training Center (CTC), and IG evaluation findings/observations; assigns responsibility for problem resolution to appropriate Training/TD (Task) Proponent, TRADOC directorates, or major commands; tracks problem resolution to completion.

	(i) Ensures standardization and integration of policy in this regulation throughout other TRADOC/subordinate command regulations, supporting pamphlets, and training/TD-related Staff and Faculty Development Program courses/products. (j) Receives In-Progress Reviews (IPRs) and has final approval of HQ TRADOC-produced trainer/training developer courses/products (including those developed by contractor) to ensure compliance with this regulation.
(3) HQ, FORSCOM; HQ, USAREUR; HQ, USARPAC; EUSA	(a) Ensure --- 1 Administrative and logistical support operations in their respective schools are conducted IAW applicable regulations to provide the best possible support. 2 Corrective action is taken on respective command issues identified in accreditation, IG, and DCST-generated/forwarded reports. (b) Track all issues from Evaluation/QA and IG visits. (c) Provide evaluation feedback to the TD (Task) Proponent. (d) Provide troop support for TEAs.
(4) Chief, NGB, Director of Operations; Training Division Commander, USARC	(a) Ensure --- 1 Administrative and logistical support operations in respective ARNG and USARC schools are conducted IAW applicable regulations to provide the best support. 2 Corrective action is taken on ARNG- and USARC-related issues identified in accreditation, IG, and DCST-generated/forwarded reports. (b) Track all issues from Evaluation/QA and IG visits. (c) Provide accreditation support IAW Chapter III-2, Total Army School System Accreditation Program. (d) Provide evaluation feedback to the TD (Task) Proponent.
(5)Cdr, CASCOM; Cdr, Maneuver Support Center (MANSCEN); Commanders/ Commandants, Training/TD (Task) Proponents, AMEDD, and	(a)Conduct evaluations IAW this regulation to ensure MERs were met, collect and analyze evaluation data, and provide management reports of findings. (b)Establish an independent Evaluation and QA Program office reporting directly to senior leadership (not department heads) to implement the Evaluation and QA Program and all QA/evaluation functional areas thereof IAW this regulation. (c) Perform roles, responsibilities, and conduct of accreditations IAW Chapter III-2, TASS Accreditation Program. (d) Conduct instructor certifications IAW Chapter II-1, Staff and

USASOC Service School	Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs. (e) Ensure evaluator/training developer training/qualification. (f) Ensure validation of all training courses and products. (g) Resolve Training/TD (Task) Proponent-related issues identified in TASS accreditation, IG, and DCST-forwarded reports.
(5)Cdr, CASCOM; Cdr, Maneuver Support Center (MANSCEN); Commanders/ Commandants, Training/TD (Task) Proponents, AMEDD, and USASOC Service School (continued)	(h) Submit TEA requests to the TRADOC Studies Program; participate in TEAs as appropriate. (i) Evaluate compliance with TATS Course analysis, design, development, validation, and implementation requirements IAW TATS Course policy in this regulation. (j) Ensure validation of TADLP processes and products. (k) Evaluate effectiveness and compliance of contractor-developed training programs and products with policy and guidance in this regulation and the TADLP. (l) Annually consolidate critical information requirements; submit to Center for Army Lessons Learned (CALL) for consideration during collection efforts at the CTCs and contingency operations. (m) Provide to CALL copies of school lessons learned publications and research materials of permanent interest to the Army as a whole for inclusion in the online CALL database. (n) Retrieve and report to trainers or training developers, as appropriate, any CALL, CTC, or other-reported deficiencies; recommend solutions; and follow up to verify corrections as required by senior leadership. (o) Ensure currency of all training products, courses, and training support packages (TSPs), to include electronic versions in the Army Doctrine and Training Digital Library (ADTDL) and, upon standup, Digital Training Access Centers (DTACs). (p) Ensure conduct of quality control (QC) of each TD process/product in this regulation. (q) Ensure QA of noncommissioned officer academies (NCOAs). (r) Ensure QC of applicable training institutions, e.g., Sergeants Major Academy for their respective NCOAs. (s) Provide input to manpower and budgetary resource acquisition documents. ***Note:*** The above responsibilities need to be shared/divided between CASCOM and its Combat Service Support schools.

III-1-3. Description and Requirements

Description a. Evaluation is one of the five phases of the Army's TD process, i.e., the Systems Approach to Training (SAT). As such, it is a dynamic process that can occur as formal internal and external evaluations or informal feedback between the student and instructor as well as between the field commander or CTC and the proponent school. It ---

(1) Ensures implementation of training and TD programs, processes, and guidance required by law or regulations.
(2) Verifies the use of the SAT process in the analysis, design, and development of training and training products.
(3) Impacts analysis decisions (i.e., whether or not there is a need for training/ training products; who needs the training; and what tasks are trained) and each of the other SAT phases: design, development, and implementation.
(4) Provides feedback to decision makers on effectiveness and appropriateness of both the product development process as well as the training programs and products.
(5) Identifies training, training product, and training/TD management deficiencies; recommends corrective actions; and follows up to ensure corrections.

Outputs b. As evaluation is one of the phases in the SAT process, the entire function is a **minimum essential requirement (MER)**. Minimum essential outputs:

(1) Evaluation reports from internal and external evaluations of the functional areas with identified deficiencies and recommended corrective actions. Evaluators must ensure the MERs listed in the "Outputs" paragraph of each chapter of this regulation are met.
(2) Follow-up on identified deficiencies.
(3) Validated training courses/products.
(4) Accredited training institutions.
(5) Certified instructors; qualified evaluators and training developers.
(6) Validated evaluation instruments.
(7) MEP (and supporting TD Project Management Plans as required).

III-1-4. DOES Roles

Roles a. The DOES (or functionally equivalent organization) is the "evaluator" of the Army's training development process, instructors, training institutions, as well as training and training programs and products. DOES evaluation roles are described below.

Role	Activities
(1) Total Army Distance Learning Program Master Plan (TADLP-MP)	The DOES supports evaluation/quality assurance of the TADLP implementation. Program elements evaluated are as follows: (a) Student management (i.e., tracking of students through resident and DL course modules). (b) Scheduling of facilities, students, courseware, equipment, OPTEMPO, and other resource requirements. (c) Product management: 1 Test management/grading. 2 Appropriateness and effectiveness of courseware/media. 3 Development of products IAW TR 350-70, infrastructure standup, and TRADOC Technical Media Standards. (d) DL training and training management.
(2) Internal Evaluation Program	The DOES conducts internal evaluation of the following functional areas: SAT process, Individual Training and Education Process/ Program, training products, personnel (instructor evaluation/ certification; evaluator and training developer qualification), Training Institutions/facilities, conduct of needs assessments, and unit training. This evaluation --- (a) Ensures that training and training products are developed IAW the SAT process (i.e., as the result of a needs analysis and the training analysis, design, and development requirements in this regulation), which will result in efficient and effective training. (b) Ensures appropriate conduct of training/instruction and training transfer. (c) Involves evaluation of training products to determine their correctness, efficiency, and effectiveness. (d) Involves verification of certified instructors and qualified evaluators and training developers.
(3) External Evaluation	The DOES manages the school's outreach program to Active and Reserve Component units (i.e., unit evaluation), TASS Training Battalions, as well as non-resident instruction (i.e., non-resident DL). It involves the evaluation of instruction, training transfer, and training products. The prime focus of the program is to obtain feedback concerning the competency of graduates and effectiveness and utility of proponent products. The focus in the future will be on the effectiveness of DL and DL products. The primary modes of gathering information are through observation, structured interviews, and surveys/questionnaires. Resource

<table>
<tr><td></td><td>constraints will require use of “distance evaluation” techniques (e.g., electronic mail, internet, or video teleconferencing) for interviews, surveys, and unit/CTC/CALL feedback.</td></tr>
<tr><td>(4) Major Exercise and CTC Interaction</td><td>The DOES serves as a POC for consolidating school/branch proponent areas/topics for observation and comment and for interaction with other proponent schools and major subordinate commands when proponent schools provide SMEs to serve as observers/data collectors during CTC interactions and during TRADOC's participation in major exercises. The DOES:
(a) Annually consolidates Training/TD (Task) Proponent’s critical information requirements and submits requirements to CALL for consideration during collection efforts at the CTCs and contingency operations.
(b) Retrieves and reports to trainers or training developers, as appropriate, any CALL or CTC-reported deficiencies, followed by verification of deficiency corrections.
Note: See Chapter V-8, CTC TD Interface, for CTC and Training/TD Proponent interface responsibilities/actions.</td></tr>
<tr><td>(5) Standard-ization</td><td>The DOES provides oversight of a school's efforts in support of Army and joint standardization programs, as required.</td></tr>
<tr><td>(6) CALL Interaction/ Lessons Learned Program</td><td>Proponent schools establish points of contact (POCs) to facilitate coordination of lessons learned actions with CALL. CALL and school POCs coordinate for lessons learned collection teams; clarification of proponent branch issues included in CALL collection efforts; staffing of Doctrine, Training, Leader Development, Organization, and Materiel and Soldiers (DTLOMS) implications raised during CALL analysis; and staffing of TRADOC Remedial Action Program (T-RAP) (TRADOC Reg 11-13) issues. The DOES responsibilities relative to CALL are as follows:
(a) Establish POC (name and telephone number) for lessons learned.
(b) Access:
<table>
<tr><th>This internet address…</th><th>For…</th></tr>
<tr><td>CALL Gateway: http://call.army.mil:1100</td><td>Lessons learned, tactics, techniques, and research materials (including consolidated operations and training feedback).</td></tr>
<tr><td>http://call.army.mil:1100/call/ homepage/calldb5.htm</td><td>Unclassified sensitive CALL Database.</td></tr>
</table>
</td></tr>
</table>

	<table><tr><td>SIPRNET: http://199.123.114.194:1100)</td><td>Classified CALL Gateway and Database.</td></tr></table> (c) Provide issue updates to CALL analysts. (d) Assist CALL analysts in the analysis of lessons learned.
(6) CALL Interaction/ Lessons Learned Program (continued)	(e) Respond to CALL routine and priority issue taskings. (f) Task school training and TD activities/directorates for responses to CALL issues; follow up to verify deficiency corrections. (g) Provide to CALL copies, digital and hard copy, of school lessons learned publications and research materials of permanent interest to the Army as a whole for inclusion in the online CALL database.
(7) TRADOC Studies Program	The DOES identifies requirements for and serves as sponsor of TEA studies. For new materiel systems or TADSS, TEAs are required (TR 350-32) before each milestone decision review and post-fielding unless waived by DCST. TEAs typically assess training impacts of new equipment systems, estimate or measure training effectiveness and cost effectiveness of alternative training programs, or assess effectiveness of fielded training. The DOES submits TEA study requirements for the next FY in response to the annual HQ TRADOC call for studies (see Chapter II-2, Training Development Workload and Resource Management). Study requirements should be forwarded to HQ TRADOC, DCST (ATTN: ATTG-CF) and should indicate resources required to conduct the study (e.g., travel funds for data collection; assistance from TRAC to carry out the study). The DOES-identified studies are reviewed, prioritized, and programmed for DCST resources. ***Note:*** Training/TD (Task) Proponents also receive post fielding feedback from using units; this feedback can improve training and training support products.
(8) Interservice Course Evaluation	The DOES interacts with other service evaluation directorates on matters pertaining to interservice course evaluation. Each service evaluates its own interservice training courses. The ITRO evaluation subcommittee will not conduct evaluations, surveys, or visits unless requested to do so by a host or participating service through the ITRO steering committee.
(9) TASS Training Institution Assistance/ Accredita-tion	The DOES establishes and maintains direct communication and visitation links with designated TASS Training Battalions. The relationship with the TASS Training Battalions is one of both assistance and evaluation. The DOES schedules accreditation visits to TASS Training Battalions. See Chapter III-2, Total Army School System

	Accreditation Program, for accreditation policy and guidance and TR 351-18, TASS, for functional alignment and other TASS policy.

III-1-5. Evaluation Planning and Management

Introduction

a. Management of the Evaluation and Quality Assurance Program involves the use of planning documents, the development of data collection documents, evaluation of data analysis, and preparation of reports and back-up data.

Master Evaluation Plan (MEP)

b. The Master Evaluation Plan is the Training/TD (Task) Proponent's overall strategy for accomplishing evaluation/QA functions and providing specific descriptions of programs. All school directorates and departments should participate in development of the Master Evaluation Plan since the plan must serve the feedback needs of all.

Note 1: See Chapter II-2, Training Development Workload and Resource Management, for additional management planning guidance.

Note 2: See Paragraph III-1-6, Master Evaluation Plan Specifications (this chapter), for MEP requirements.

Information Collection

c. Surveys/questionnaires, structured interviews, and on-site observations are means by which evaluators can collect information. The advantages and disadvantages of surveys/ questionnaires and structured interviews are portrayed in the following table:

Source	Advantages	Disadvantages
(1) Survey/ Questionnaire	(a) Efficient for large populations. (b) No field staff required (from the source of the questionnaire). (c) Relatively low in cost. (d) Possible elimination of interviewer bias. (e) Very useful during field visits to units to ensure better control, shorter response time, and increased reliability and validity of data.	1 Slow responses (i.e., data collection). 2 Loss of some control (administration of the survey). 3 Possibility of misinterpretation and biased responses.
(2) Face-to-face Interview (structured interview)	(a) The most flexible data collection technique. (b) Higher assurances of proper identification of respondents. (c) Better response rates.	1 Relatively expensive and time consuming. 2 Interviewer training/ supervision is required. 3 Possible interviewer bias in results.

(3) Observations	(a)High degree of accuracy. (b)Observation of actual performance allows identification of problems, task steps, etc.	Time consuming and resource intensive, especially if TDY is required.

Note 1: Evaluators must be trained to develop and conduct surveys/questionnaires as well as face-to-face interviews.

Note 2: Surveys for participants outside of TRADOC require approval and survey control numbers IAW AR 600-46.

Note 3: The success of structured interviews relies heavily on the skills of the interviewer and the quality of prior question development. The following procedures will help ensure effective interviews:

- Ask questions which seem reasonable to the respondent and directly relevant to the matter under discussion.
- Use language appropriate for the respondent.
- Convey a positive attitude, concern for respondent, and importance of topic.
- Structure content of interviews so important items of inquiry are in writing, although the interviewer should allow adequate time for spontaneous remarks from the respondent.
- Plan, coordinate, and schedule ahead of time to ensure the respondent's availability with as little interruption as possible.
- Provide some form of feedback to respondents expressing appreciation for their input and reflecting on how their input contributes to the overall results of the evaluation.
- Collect only personal data that is relevant to the survey; communicate that relevancy to the respondent.

Evaluation Data Analysis

d. The DOES establishes and maintains an internal capability to perform data analysis services, such as ---

(1) Interacting with statistical data analysis packages.

(2) Establishing a baseline for instructor evaluations, test analysis, end-of-course student critiques, and graduate surveys.

(3) Analyzing data from external feedback sources, such as EXTEV visits, lessons learned observations and issues, field returnee interviews, graduate/supervisor questionnaires, and other feedback sources.

Report Writing and Data Displays

e. The DOES must provide objective information in a form which is useful in making assessments and directing change. It should use computer-generated reports which portray data in tables and graphs to clearly depict the findings for management review.

III-1-6. Master Evaluation Plan (MEP) Specifications

Submission Requirements

a. Reporting and distribution requirements:

(1) Frequency: Annually.

(2) Due date: NLT 1 May of each year for the following fiscal year.

(3) To: Cdr, TRADOC, ATTN: ATTG-CD, Fort Monroe, VA 23651-5000.
(4) Copy furnish: Major subordinate commands, as appropriate.
(5) Contents/Format: (See following paragraph.)

MEP Contents

b. The MEP is the planning document that defines all evaluation requirements for the next FY, to include all evaluation requirements in evaluation project management plans. It will contain the following information (state "None" if resources prohibit conduct of specified evaluations):
(1) Executive summary.
(2) External evaluation plan. Include plans for ---
(a) Assistance visits (for affiliated TASS Training Battalions).
(b) Assessment/accreditation (for affiliated TASS Training Battalions).
(c) AC and RC unit visits.
(d) Assessment of new system training/training product development for compliance with TR 350-70.
. (3) Internal evaluation plan. Include ---
(a) Instructional reviews IAW applicable laws and regulations.
(b) TD process reviews.
(c) Training product reviews.
(d) Personnel (instructor, training developer, and evaluator) certifications and qualifications as appropriate.
(e) Needs assessments and special higher HQ or IG studies conducted.

MEP Supporting Plans

c. TD Project Management Plans (MANPLANs) that support the Master Evaluation Plans may be simple, unwritten (i.e., the project requirements may exist in a database but not as a formal report) or complex, very detailed (they may even include a Memorandum of Understanding). The following outline provides a sample format for evaluation project management plans:

(1) Purpose/Scope.
(2) Objectives.
(3) Background.
(a) Issues.
(b) Impact.
(c) Assumptions.
(d) Limitations.
(4) Essential elements of analysis.
(5) Methodology.
(6) Resource requirements.
(7) Responsibilities and interactions (manpower, TDY, materials, etc).
(8) Schedule of events (timelines and milestones).
(9) Appropriate annexes, appendices, etc.
(10) Reporting requirements:
(a) Timelines and milestones for interim and final reports.
(b) Report format and content.

Note: Include ---

- Identified deficiencies and/or "good" reports.
- Recommended solutions.
- Verified corrections.

(11) Distribution requirements.

III-1-7. Evaluation Functional Areas

Requirements

a. The evaluation function encompasses six major functional areas:

(1) SAT process.
(2) Individual Training and Education Process/Program.
(3) Products.
(4) Personnel.
(5) Training Institutions/Facilities.
(6) Needs Assessment.
(7) Unit Training

SAT Process

b. Evaluation of the SAT process is to ensure that training products and materials are developed in compliance with TR 350-70 for analysis, design, development, format, submission, and fielding. The DOES is responsible for ensuring the commander/ commandant that the SAT process was followed and MERs were accomplished (to include affirmation of needs analysis or training strategy determination of a valid need for training/ training products). As a part of this function, DOES personnel:

(1) Participate as independent team members during the analysis, design, and development of training and training products and as non-voting members on boards and In-Process Reviews (IPRs) to ensure SAT requirements are met.
(2) Verify safety, risk assessment, and environmental protection measures have been considered throughout the TD process and incorporated into training products IAW Chapter I-2, Safety and Environment (this regulation).

Instructional Process/ Program

c. Evaluation of the instructional process/program is critical to determine the effectiveness of courses of instruction for which the school has proponency. It is an independent determination of the quality of training and testing while concentrating on the actual presentation of instruction-presented and self-paced training, competency of instructors and examiners, relevance as well as adherence of course content to the training objectives, management and usability of DL training/training products, and training transfer.

(1) Instruction.
(a) Purpose. The purpose of instruction evaluation is to provide assistance and improve training. DOES evaluation will not impinge on the inherent responsibility of department directors for quality control of instruction. It is not the same as staff and faculty training development follow-up and consultation. The evaluation focus is on whether or not ---
1 DL and student management is effective and efficient.
2 The instructional environment (facilities; equipment; TADSS; ranges; FTX site; etc.) contributes to the learning experience.

Instructional Process/ Program (Continued)

3 The instructor demonstrates competence in the tasks being taught and skill in instructional techniques appropriate for the method of instruction.

4 Instructors are aware of and have access to classified (as required) and unclassified sensitive CALL Gateway databases and other research materials, including the consolidated feedback from Army operations and training, to review the latest lessons available; they must also implement new tactics, techniques, and procedures (TTP) as appropriate.

5 Student learning is taking place through opportunities for interaction, such as questions and answers, role playing, student practice, testing, and after-action reviews (AARs), e.g., AARs after field training exercises.

6 A student critique system gives students the opportunity to freely make comments in writing and verbally about instruction and administrative support matters; proponent authorities should follow up on the input.

(b) Evaluation of student testing/performance measurement. Students must perform to standards and conditions prescribed in lesson plans/lessons. The DOES:

1 Students are tested to determine whether or not they can accomplish the Terminal Learning Objectives (TLOs).

Note 1: It is not the intent of this policy to have the QA activity (DOES) conduct testing.

Note 2: See Chapter VI-7, Student Performance Measurement/Testing.

2 Provides a selective, independent assessment of validity and suitability of resident and nonresident tests (e.g., distance learning material, etc).

3 Verifies tests have been reviewed/analyzed for reliability.

4 Verifies and provides comments on the quality of test construction and instructions to testers and students.

5 Determines if tests measure task performance to TLO standards.

6 Maintains statistics on test results to determine trends and provides feedback to departments on adequacy of tests and test items. Automated systems should provide test results, and all directorates, to include DOES, should have access to the data.

(c) Location: Evaluation of instruction may take place in various sites:

1 The Training/TD (Task) Proponent.

2 Army Education Center, Army Training Centers (ATCs) (in coordination with ATC QA elements), and DL classrooms.

3 TASS Training Battalions.

(2) Training transfer. Student success in performance, both during and after instruction/training, substantiates that instruction/training

effectively trains the required critical tasks and supporting skills and knowledge. Evaluation of training transfer involves validation of transfer of learning to job/mission. The DOES will provide the Directorate of Training (or functionally equivalent organization) and departments input for their use in assessments of training needs and objectives, such as the difference between actual performance of individuals and units and performance to required standards Input may include ---

(a) Higher HQ, HQ TRADOC, CTC, Call, and IG evaluation findings.

(b) Issues from EXTEVs (survey and interview responses).

Products

d. Training product evaluation includes ---

(1) Evaluation of individual, collective, and self-development training products and literature for currency, usability, efficiency, effectiveness, doctrinal and technical correctness, and compliance with current Army/TRADOC policy and TRADOC Technical Media Standards.

(2) Verification that Training Requirement Analysis System (TRAS) documents meet requirements in Chapter II-8, TRAS (this regulation) as required.

(3) Training courses/instructional materials are of high quality, correctly reflect course design decisions, identify training objectives and performance standards, and appropriately illustrate and describe the material to be taught.

(4) Validation of courses, training products, and materials. Validation differs from evaluation in that validation is the process used by the training developer to determine if a new/revised training product/material accomplishes its intended purpose efficiently and effectively. The training proponent conducts individual and/or group trials, collects and analyzes validation data, and makes any necessary revisions to the training product/material.

Note: See Chapter III-3, Product/Material Validation, for policy and guidance on validation of training courses, products, and materials.

Personnel

e. Evaluation of personnel includes Instructor certification as well as Training Developer and Evaluator qualification. See the following references for respective policy and guidance:

(1) Instructor certification: Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs; and Chapter III-4, Evaluating Instructor Performance.

(2) Evaluator qualification: (See guidance in this chapter.)

(3) Training Developer qualification: Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs.

Training Institutions

f. Evaluation of DL will require assessment of DL classrooms and facilities to verify they meet TRADOC Classroom XXI Master Plan and TADLP-MP requirements to support DL. Also, TASS training institutions are evaluated in order to be accredited. See Chapter III-2, Total Army School System Accreditation

Program, for policy and guidance in the accreditation of TASS training institutions.

Note: Some Training/TD (Task) Proponents go through the Council on Occupational Education to be accredited. Proponent accreditation should always be to the same standard as that of the TASS Training Battalions.

Needs Assessment

g. Needs assessment is a process of discovering weaknesses or potential problems for training or job/mission performance. It can be a ---

(1) Very *informal* assessment of training and the identification of a potential training or TD need to be confirmed by needs analysis (IAW Chapter IV-1, Needs Analysis).

(2) *Formal* process for the training impact analyses of emerging/new/displaced systems done as a part of the TEA Program. See appropriate references at the beginning of this chapter for TEA and TRADOC studies policy and guidance.

Unit Training

h. Unit training evaluation is the process used to identify collective and individual task performance and product deficiencies in unit training and to obtain recommendations for improvement of training or the products that support training. This evaluation involves both individual and unit training and doctrine products (e.g., soldier training publications [STPs]; mission training plans [MTPs]; drills; training support packages [TSPs]; training aids, devices, simulators, and simulations [TADSS]; field manuals [FMs]; training circulars [TCs]). Unit and training proponent evaluators determine the value, technical accuracy, and efficiency and effectiveness of the training, training programs, and products. The evaluators report deficiencies and recommendations for improvement to the training proponent for conduct of a needs analysis. In effect, the proponent performs an external evaluation to identify deficiencies (and improvement recommendations) for subsequent needs analysis to determine the need to improve, eliminate, or replace the training or training products.

III-1-8. Evaluator Training and Qualification

Evaluator Responsi-bilities

a. Evaluators are the eyes and ears of the command; they represent command authority whenever they evaluate training inside or outside of the proponent school. Evaluators must be thoroughly trained in every aspect of their evaluation responsibilities. Competent evaluators are just as critical a link in the SAT as are trainers. Accordingly, Training/TD (Task) Proponents will ensure their evaluators are a credit to the command in their bearing, competence, professionalism, and commitment to excellence in training.

Evaluator Training

b. Evaluator training requirements are as follows:

Evaluators will complete ---	Before evaluating ---
(1) Training Evaluator Course ***Note 1:*** The TRADOC Training Evaluator Course is under revision. ***Note 2:*** Evaluators who accredit should also take this course as accreditation involves evaluation of instruction and training institutions.	(a) Processes. (b) Programs. (c) Products, including tests. (d) Personnel. (e) Training Institutions. (f) Needs assessment/Special studies. (g) Development of surveys/ questionnaires and face-to-face interviews.
(2) Systems Approach to Training (SAT) Basic Course	(a) SAT process. (b) Training products.
(3) Total Army Instructor Training Course (TAITC)	Instruction.
(4) Small Group Instructor Training Course (SGITC) in addition to TAITC	Small group instruction.
(5) Video Teletraining Instructor Training Course (VTTITC)	Video Teletraining
(6) Test Writing (TBD) ***Note:*** Prerequisite is the SAT Basic Course	Tests

Note 1: Civilian and military instructors must receive the same or equivalent training.

Note 2: At least one member of the evaluation team should have the technical knowledge of the evaluated areas.

Note 3: See Chapter II-1, Staff and Faculty Development: Instructor Certification, TRADOC Common Training, and Local Programs, for a complete list of Staff and Faculty Common Training course requirements.

Evaluator Qualification

c. In addition to formal training, evaluators will be required to perform their evaluation duties under the close supervision of a fully qualified and experienced evaluator until deemed by the Director of Evaluation (or equivalent function) to be fully qualified to represent the proponent school and perform evaluation duties without supervision. To meet minimum evaluator qualification requirements and standards of competency, proponents must ensure evaluators are ---

(1) Imbued with the idea that their mission is to insist on standards being met and to **assist** training institutions to meet those standards. In this sense they are leaders and trainers.

(2) Thoroughly familiar with regulations governing development, administration, operation, logistical support, and conduct of training in Army NCO Academies and TASS training institutions.

(3) Familiar with the format of Training/TATS Course TSPs, Shared/Common Task TSPs, lesson plans, and course management plans (CMPs).

Note: Evaluators should effect a "seek and help" versus a "seek and hit" approach. The intent should be on ensuring the training development function produces the Mission Essential Requirements of each process/product in this regulation, seeking training efficiency and effectiveness, providing guidance to correct deficiencies, and ensuring the viability of ATXXI training programs and products.

Chapter III-2

Total Army School System Accreditation Program

III-2-1. Chapter Overview

Overview

a. Chapter III-2 prescribes the who, what, when, where, and how of the Total Army School System (TASS) Accreditation Program, to include assistance visits. The Office of the Deputy Chief of Staff for Education (DCSED), HQ TRADOC, manages this program for the CG, TRADOC.

Chapter Index

b. This chapter covers the following:

Content	Paragraph
Functional Alignment	III-2-2
Accreditation	III-2-3
Assistance and Accreditation Authority and Responsibilities	III-2-4
Accreditation Evaluation Team	III-2-5
Accreditation Evaluator Qualifications	III-2-6
Conduct of Accreditation Evaluation Requirements	III-2-7
Report Format	III-2-8
Report Routing and Suspense	III-2-9
Corrective Actions	III-2-10

III-2-2. Functional Alignment

Purpose

a. Functional alignment is---

(1) Accomplished by aligning TRADOC proponent service schools with TASS Training Battalions.

(2) The link between the TASS Training Battalion and its associated TRADOC proponent school.

(3) Intended to develop shared responsibility for the quality of TASS Training Battalion graduates.

(4) An attempt to facilitate branch-unique assistance to aligned training institutions.

References b. Required **regulatory** references are as follows:
(1) Army Regulation 351-1, Individual Military Education and Training
(2) TR 351-18, Total Army School System (TASS)

Requirements c. Functional alignment policy and guidance are covered in TR 351-18.

III-2-3. Accreditation

Purpose/ Description a. The CG, TRADOC is the Army's Executive Agent for accreditation and is the accreditation authority for all schools teaching TRADOC courses. The CG, MEDCOM, and CG, USASOC, are the accreditation authorities for their respective courses. The HQ TRADOC, DCSED provides accreditation policy and delegates the responsibility to accredit TASS schools to the appropriate proponent.

(1) The purpose of this program is to ensure that students in Army schools are
learning the right tasks---
(a) To the appropriate standards.
(b) From qualified/certified instructors and mentors.
(c) With all the necessary equipment, supplies, support personnel and facilities.
(d) In an atmosphere conducive to learning and supportive of an appropriate standard of military life.
(2) Accreditation is the formal authority to conduct (or continue to conduct) training. Conduct of Training is the most important function of the institution. How well it trains the soldier is based on the product it graduates. Therefore, institutions should not receive a withhold accredit or non-accredit based solely on their lack of Training Support unless it has a direct impact on the Conduct of Training, safety, health and welfare issues, any compromise of course examinations, discipline and fair treatment of soldiers, or the careers of soldiers.
(3) Accreditation certifies an institution's administration, operations, and logistical support are adequate to support training to course standards. It certifies all training follows the correct training methodology and task sequencing and certifies resources are IAW course requirements. It also certifies, with the assistance of proponent subject matter experts (SMEs), the institution is conducting phase/modules of training IAW the appropriate Training/TD (Task) Proponent's guidance.
(4) If institutions cannot provide quality training based on the POI and regulations due to the higher headquarters' (HQ) inability to provide adequate resources and support, the course or institution can

receive a non-accredit due to higher headquarters' issues. The higher headquarters will be required to correct the identified problem in the manner and time frame outlined in Paragraph III-2-7f before the institution can receive an accreditation reinstatement.

Definitions

b. See Glossary for TD and program-related terms. Definition of term specific to this chapter is as follows:

Regional Coordinating Element. The TRADOC office in the Continental U.S. (CONUS) sub-geographical region that facilitates the coordination for Army training instructors, students, training devices, equipment, and facilities for Reserve Component (RC) individual soldier training.

References

c. Required **regulatory** references are as follows:

(1) Army Regulation 351-1, Individual Military Education and Training
(2) FM 25-100, Training the Force
(3) TR 351-18, Total Army School System (TASS), Appendix B, Accreditation Checklist; Appendix C, Sample Accreditation Checklist; and Appendix D, Sample Final Accreditation Report

Output Requirement

d. The **minimum essential requirement** is accreditation of the proponent school and each TASS Training Battalion. Training institutions will be accredited every 3 years in a single training year unless the functional proponent commandant determines a need for more frequent accreditation.

Types

e. There are two types of accreditation: institution and course. Normally, proponents accredit only TASS schools. Some branch-specific proponents (officer education/leadership) also accredit courses. Functionally aligned TASS Training Battalions will undergo institution accreditation and may undergo course accreditation at the discretion of the proponent.

(1) **Institution accreditation** certifies that an institution's Training Support and Conduct of Training are adequate to train to course standards. Institution accreditation includes evaluation of all training being conducted to ensure training methodology, sequencing, and resources are IAW course requirements.
(2) **Course accreditation** certifies that instruction is conducted IAW proponent guidance and that students graduating from the course are trained to the same standard as students graduating from the same course taught at the proponent service school. Only a subject matter expert (SME) designated by the respective proponent service school is authorized to evaluate and recommend accreditation of a course. Additionally, a course cannot be accredited unless the institution is accredited.

III-2-4. Assistance and Accreditation Authority and Responsibilities

Assistance/ Accreditation Authority

a. Commander, TRADOC, delegates accreditation and assistance authority to proponent school commandants for the TASS Training Battalions with which they are functionally aligned.

Assistance/ Accreditation Responsi-bilities

b. Assistance and accreditation responsibilities are outlined in the following table:

Activity	Responsibility
(1) HQ TRADOC, Deputy Chief of Staff for Education (DCSED)	(a) Orchestrates quality assurance (QA) in the TASS and arbitrates QA issues between the U.S. Army Reserve Command (USARC), National Guard Bureau (NGB), and the AC, to include proponent schools. (b) Will assist TRADOC proponent schools which have been delegated specific accreditation authority. (c) Resolves "higher HQ issues" identified during assistance visits or self evaluations and forwarded by Training/TD (Task) Proponent as required.
(2) Regional Coordinating Elements (RCEs)	(a) Address unresolved issues to the appropriate authority for consideration; track issues for resolution. (b) Consolidate unresolved “higher HQ issues” and forward list to HQ TRADOC, DCSED. (c) Consolidate unresolved issues and forward list to HQ TRADOC, DCSED. (d) Conduct periodic announced and unannounced Training Observation (TO) visits to training site classes in session. (e) Execute TRADOC QA program within the region and arbitrate QA issues between TASS Training Battalions and functionally aligned TRADOC proponent school. (f) Monitor QA within the region, to include corrective action and coordination/conduct of evaluation visits, to ensure a continuing program of interrelated parts; anticipate and take preemptive actions to “de-conflict” potential QA problems within the region.
	(g) Ensure all RCE personnel are trained and qualified as QA evaluators. RCE personnel may serve as composite team members for accreditation evaluations of TASS Training Battalions in other region. (h) Create and maintain a database of issues of regional interest extracted from Institutional Self Evaluation (ISE) reports; HQ TRADOC, DCSED trend reports; waiver requests; and accreditation reports. (i) Collect and review TO reports, ISE reports, accreditation reports, and HQ TRADOC, DCSED trend reports to determine trends of regional significance. RCE makes appropriate recommendations to HQ TRADOC, DCSED; the Adjutant General (TAG); and USAR Training Divisions. (j) Review all requests for waivers of QA requirements; endorse as appropriate; and forward a copy of request and endorsement to HQ TRADOC, DCSED. (k) Disseminate results of QA visits to appropriate commands. (l) Budget for and fund QA travel. Initiate and process travel orders for QA visits and training of evaluators.

(3) Commanders/ Commandants/ Training Proponents and Other Designated Proponents	(a) Establish and maintain a working relationship with functionally aligned regional Training TASS Battalions. (b) Conduct or coordinate accreditation of proponent school. (c) Coordinate and conduct accreditations of TASS Training Battalions as required/coordinated between proponent school and Training TASS Battalions. Proponent school Directorates of Evaluation and Standardization (DOES) or equivalent function evaluate all Training TASS Battalions within a school brigade for accreditation during the same fiscal year. (d) Provide TASS Training Battalions assistance as requested in the self evaluation. (e) Determine the number of persons required to conduct assistance visits based on estimated workload. A tri-component team is not required for assistance visits. (f) Forward to HQ, TRADOC through the appropriate RCE a summary report of unresolved "higher headquarters' issues" identified in the TASS Training Battalion self evaluation and during the assistance visit. For each issue, the report will specify exactly what the problem is, what is causing the problem, impact on training or soldier welfare, actions taken to resolve the problem, and results of those actions. (g) Maintain accreditation standards within proponent schools IAW Checklists in TR 351-18. (h) USASMA is responsible for developing an accreditation SOP for multi-functional regiments/brigades (USASMA). (i) Fund all visits (a proponent school responsibility).

Responsi-bilities	(3) Commanders/ Commandants/ Training Proponents and Other Designated Proponents (continued)	(j) Accredit as specified below: 1 **Proponents:** evaluate and accredit proponent school and TASS training institutions. ***Note:*** Accreditation of proponent school can be through the Directorate of Evaluation and Standardization (DOES) (or equivalent function) or through an outside agency. 2 **U.S. Army Sergeants Major Academy (USASMA)**: accredit all TASS NCOAs. 3 **U.S. Army Training Center and Fort Jackson**: accredit all Drill Sergeant School Battalions. 4 **U.S. Army Infantry Center and School:** accredit Air Assault and Officer Candidate School (OCS) courses. ***Note:*** OCONUS TASS multifunctional brigades and all TASS NCO academies are functionally aligned with USASMA for accreditation. USASMA assembles a composite evaluation team of subject matter experts who can evaluate courses taught at these training sites at the optimum time, reducing training distraction caused by multiple accreditation visits. Teams will consist of CA, CS, CSS, and others as appropriate. Each team will appoint a team chief and appropriate SMEs. Those sites/courses outside the optimum window will be scheduled for accreditation directly with the appropriate proponent school. A copy of all assistance/ accreditation reports will be provided to USASMA. (k) Coordinate assistance visits directly between the multi-functional brigade and the proponent schools. (l) Forward to HQ TRADOC, DCSED completed accreditation reports, to include summary, checklists, and notes to checklists. (m) Resolve all disputes concerning accreditation evaluations and reports. The decision of the proponent commandant is final. (n) Determine their own tri-component team requirements.
	(4) Commanders, TASS Training Battalions	(a) May request assistance visits if they agree to fund the cost of the visit. (b) Prepare for assistance visits by completing a self evaluation based on the accreditation checklist IAW TR 351-18 and the results of any command inspections or training evaluations conducted by their higher headquarters. ***Note:*** The self evaluation will identify specific problems for which proponent assistance is requested and problems which can only be resolved by higher headquarters' action. The latter must be specific about who and what the problem is, impact on training or soldier welfare, and actions the school has taken to resolve the problem. School battalion provides the self evaluation to the aligned proponent NLT 30 days before the scheduled assistance visit. This allows the proponent time to plan for and prepare requested assistance as well as opportunity to discuss "higher headquarters' issues" with appropriate higher headquarters' staffs.

Assistance/ Accreditation Responsi-bilities (continued)

Activity	Responsibility
(4) Commanders, TASS Training Battalions (continued)	(c) Prepare and maintain a Mission Essential Task List (METL) IAW FM 25-100. The purpose of the METL is to provide a foundation against which the institution evaluates itself. The METL and the associated ISE provide the TASS Training Battalion with vehicles to bring attention to training challenges in a non-threatening environment. The focus of the process is to ensure high quality, relevant training courses. When a TASS Training Battalion surfaces challenges, it ensures that those issues are brought to the attention of the training chain of command and the Training/TD (Task) Proponent. (d) Annually prepare an ISE. Purpose of the ISE is to maintain the institution's focus on quality and to establish the Total Army Quality environment of encouraging everyone to contribute to the organization's success. (e) Appoint a team of staff members (including Title XI AC soldiers) and instructors to evaluate the institution in comparison to the METL and accreditation standards. The ISE team--- 1 Meets annually to discuss findings and suggestions. Meeting format is an After Action Review (AAR) of the previous year and projection of the future. 2 Identifies challenges which preclude high quality instruction or ideas/insights which should be analyzed for implementation at all TASS Training Battalions. 3 Prepares a written report of recommendations with appropriate references and explanatory paragraphs and forwards list to school battalion commander. (f) Address issues as appropriate and forward unresolved issues to school brigade commander for record.
(5) Commanders, TASS Training Brigades	Brigade commander consolidates school battalion reports and forwards them, with comment, through Division Institutional Training DIV(IT)s or TAG to the RCE.

III-2-5. Accreditation Evaluation Team

Accreditation Evaluation Team Composition

All accreditation evaluations should be conducted by tri-component teams of Active Army, Army National Guard, and Army Reserve soldiers as determined by the proponent. Tri-component teams ---

a. Are determined by proponents.
b. Can share perspective of uniqueness of operations in one or another component.
c. Are formed from proponent-attached Title XI and RC soldiers.
d. Will include a SME for each Conduct of Training course evaluated.

III-2-6. Accreditation Evaluator Qualifications

Guidance a. Evaluators are the eyes and ears of the accrediting authority; they represent the accrediting authority wherever they evaluate training in Army schools worldwide. Accordingly, proponent service school commandants will ensure their evaluators are a credit to their command in their bearing, competence, professionalism, and commitment to excellence in training. Proponent service school commandants verify and certify the qualifications of accreditation evaluators from that Training/TD (Task) Proponent.

Qualifications b. New accreditation evaluators will be required to perform evaluation duties under the close supervision of a fully qualified and experienced evaluator, until deemed by the Director of Evaluation and Standardization (DOES) (or equivalent functional element) to be fully qualified to represent the proponent and perform evaluation duties without supervision. Specific requirements are as follows:

(1) The **accreditation team chief** must meet all evaluator criteria and be---

(a) Thoroughly familiar with regulations governing Training Support and Conduct of Training in TASS schools.

(b) Able to draw together all the findings and recommendations of accreditation team evaluators into an Accreditation Summary Report which is suitable for general officer review.

(c) Able to resolve any differences which may arise among evaluators or between evaluators and the staff of the school being evaluated.

(d) Able to assist in the resolution of discrepancies in training to standard.

(2) The **accreditation team evaluator** must be---

(a) Thoroughly familiar with the regulations governing Training Support/Conduct of Training in TASS schools.

(b) Familiar with the format of POIs, Course Management Plans (CMPs), lesson plans, and Training Support Packages (TSP) in order to effectively use these materials in evaluating instruction.

(c) Imbued with the idea that their mission is to insist on standards being met and to assist schools in meeting those standards. In this sense, they are leaders and instructors.

(d) A graduate of an Instructor Training Course (ITC) and, if the course under evaluation is taught in the small group method of instruction, must have completed a Small Group Instructor (SGI) Course.

(3) The **subject-matter expert** evaluating Conduct of Training must---

(a) Be a graduate of the course being evaluated.

(b) Hold the CMF of the course being evaluated.

(c) Be a graduate of an ITC and, if the course under evaluation is taught in the small group method of instruction, must have completed a SGI Course.
(d) Be familiar with the format of POI, CMP, lesson plans, and TSP and be able to effectively use these materials in evaluating instruction using Part II (Conduct of Training) of the Accreditation Checklist and any proponent-specific checklists.

III-2-7. Conduct of Accreditation Evaluation Requirements

Planning and Coordination

a. As a minimum, TASS regions (AC, RC schools) will be accredited every 3 years in a single training year unless the functional proponent commandant determines a need for more frequent accreditation. At least 60 days prior to each scheduled accreditation evaluation visit, the team chief will send a message or memorandum to all concerned parties.

(1) Addressees include---
(a) The Commander of the TASS school to be evaluated.
(b) Director of Training (DOT) or functional equivalent of proponent school to be accredited.
(c) NGB and State TAG (for ARNG school battalions).
(d) FORSCOM, USARC, and DIV(IT)s (for USAR school battalions in CONUS).
(e) OCONUS Major Army Command (MACOM) (as appropriate).
(f) TRADOC (DCSED).
(g) RCEs.
(h) Proponents tasked to provide SMEs.
(2) The message will---
(a) Specify the dates of the scheduled visit. (This schedule should have already been agreed to in prior informal coordination between the evaluation team and the commander of the institution to be evaluated.)
(b) Request ARNG and/or USAR representation.

Note: Make final telephonic coordination with the TASS Training Battalion at least 1 week before the visit to confirm training schedules and class locations.

TASS Training Battalion Schedule

b. TASS Training Battalions will be evaluated for accreditation at both IDT and AT/Active Duty for Training (ADT), as applicable, in a single training year IAW the following plan:

YEAR 1 (1997, 2000, 2003, etc.)					
REGION	**CA**	**CS**	**CSS**	**HS**	**PROF DEV**
A	ALL BNs	ALL BNs	N/A	N/A	N/A
B	N/A	N/A	ALL BNs	ALL BNs	N/A
C	N/A	N/A	N/A	N/A	ALL BNs
D	ALL BNs	ALL BNs	N/A	N/A	N/A
E	N/A	N/A	ALL BNs	ALL BNs	N/A

F	N/A	N/A	N/A	N/A	ALL BNs
G	N/A	N/A	ALL BNs	ALL BNs	N/A
USARPAC	N/A	N/A	N/A	N/A	CGSC BNs
USAREUR	N/A	N/A	N/A	N/A	N/A

Year 2 (1998, 2001, 2004)					
REGION	**CA**	**CS**	**CSS**	**HS**	**PROF DEV**
A	N/A	N/A	N/A	N/A	ALL BNs
B	ALL BNs	ALL BNs	N/A	N/A	N/A
C	N/A	N/A	ALL BNs	ALL BNs	N/A
D	N/A	N/A	N/A	N/A	ALL BNs
E	ALL BNs	ALL BNs	N/A	N/A	N/A
F	N/A	N/A	ALL BNs	ALL BNs	N/A
G	N/A	N/A	N/A	N/A	ALL BNs
USARPAC	N/A	N/A	N/A	N/A	N/A
USAREUR	N/A	N/A	N/A	N/A	N/A

TASS Training Battalion Schedule

(continued)

Year 3 (1999, 2002, 2005)					
REGION	**CA**	**CS**	**CSS**	**HS**	**PROF DEV**
A	N/A	N/A	ALL BNs	ALL BNs	N/A
B	N/A	N/A	N/A	N/A	ALL BNs
C	ALL BNs	ALL BNs	N/A	N/A	N/A
D	N/A	N/A	ALL BNs	ALL BNs	N/A
E	N/A	N/A	N/A	N/A	ALL BNs
F	ALL BNs	ALL BNs	N/A	N/A	N/A
G	ALL BNs	ALL BNs	N/A	N/A	N/A
USARPAC	N/A	N/A	N/A	N/A	N/A
EUSAREUR	N/A	N/A	N/A	N/A	CGSC BNs

Leadership						
REGION	**98**	**99**	**00**	**01**	**02**	**03**
A			Accredit		N/A	Accredit
B		Accredit			Accredit	
C		Accredit			Accredit	
D		Accredit			Accredit	
E	Accredit			Accredit		
F	Accredit			Accredit		
G			Accredit			Accredit
USARPAC	N/A			Accredit		
EUSAREUR	N/A		Accredit			

***Note*:** AC schools will be accredited as part of their TASS region.

Accreditation

c. The following rules apply to evaluating the Conduct of Training for accreditation:

Standard 45 Reference Excerpts

Rules

(1) When instruction at all of a training institution's IDT locations cannot be evaluated due to personnel and/or fiscal constraints, the Proponent will evaluate a statistically significant sample (which will be not less than 1/3 of the school battalion's IDT sites).

(2) All evaluated training sites must receive a first time "GO" to receive a training site accreditation. For failure to receive a first time “GO”, see guidelines in Paragraphs “Accreditation Ratings/Standards” and “Actions Following Accreditation,” this chapter. Training courses found deficient on a second visit, if required, will receive a non-accredit and remaining classes will be non-conducted in ATRRS. The process of non-conducting classes should be coordinated with the appropriate agency, TRADOC, NGB, or USARC. The remainder of the Training Battalion will receive an accreditation.

(3) All courses in session at a training site will be observed/evaluated.

(4) At least one course must be observed/evaluated to accredit an institution.

(5) At least one Annual Training will be evaluated during the year of accreditation.

(6) A training site's course or a training battalion's course that does not meet accreditation standards may be non-accredited and a training site or training battalion may still receive an accredit based on the status of its remaining courses. Only the subject matter expert may recommend a course to receive a non-accredit.

Accreditation Ratings/ Standards

d. Accreditation standards are as follows:

(1) The team chief recommends accreditation ratings based on---

(a) Input from the school battalion (Institutional Self Evaluation).

(b) Input from the RCE (Training Observation reports).

(c) Findings and recommendations of evaluators.

(d) The severity of the deficiencies and how they affect the Conduct of Training.

(e) The severity of the deficiencies and the effects they have on the soldiers' welfare, health, safety, and careers.

(2) In both major categories (Training Support and Conduct of Training) of the accreditation checklist, there are items identified as "critical." The team chief will consider results of critical items more heavily than non-critical items in making an accreditation recommendation. The appropriate accreditation rating is determined per the following Rating/Standard Table:

Rating	Standard
(a) Accredit	Accreditation of the school is authority to teach and verifies a TASS Training Battalion meets standards as established in applicable references and regulations.

(b) Withhold Accredita-tion	Withholding accreditation indicates that the institution has a significant problem or shortfall but that the Training/TD (Task) Proponent commandant believes that corrections can reasonably be implemented within 60 days or as determined by the proponent. 1 If one major category of the accreditation checklist receives an unsatisfactory rating, the team chief should strongly consider a recommendation to withhold accreditation. 2 When the Training/TD (Task) Proponent commandant withholds accreditation, it is withheld pending receipt of a satisfactory report of corrective actions from the school battalion commander. 3 This report is due to the accrediting authority within the prescribed time of the accrediting authority's official notification that accreditation is being withheld. 4 If corrective action is not or cannot be completed within the prescribed time, the training site/school battalion becomes non-accredited.
(c) Non-Accredit	Non-accredit indicates a TASS Training Battalion, regional training institute (RTI), or AC school has significant deficiencies or shortfalls and should not be teaching Army courses or a particular course. The team chief will strongly consider non-accreditation if one or more critical areas on any one checklist are determined to be a "NO GO" or three or more non-critical areas are a "NO-GO." The team chief will also determine if the cause for the non-accreditation rating is based on higher headquarters' issues. (See other paragraphs in this chapter for corrective action, provisions for follow-up evaluations, and procedures for accreditation reinstatement.

Actions Following Accreditation

e. School and accrediting authority actions following an Accreditation, Withhold Accreditation, and Non-Accreditation:

(1) **Accreditation**:

(a) Accrediting authority will issue a certificate of accreditation for those schools
meeting accreditation standards.

(b) Schools may receive an accreditation and still have "NO GOs" on their accreditation checklists. They also may have deficiencies the accreditation team observed but were listed as "GOs" on the checklist because the school fixed the problems during the inspection. It is the school's responsibility to address these issues and insure the "NO GO" and corrected deficiencies do not recur in subsequent inspections. If the same deficiencies are found in the next inspection, they will be considered recurrent deficiencies. This is a critical area on the accreditation checklist.

(2) **Withhold Accreditation**:

(a) Accrediting authority will notify the school by memorandum of its accreditation being withheld. At that time it will become official

that the school, if accredited previously, will have its accreditation rescinded.

(b) Accrediting authority will establish a suspense date for the school to provide a reply by endorsement (RBE) to the accrediting authority of corrective actions.

(c) Schools, upon receipt of a withhold accreditation memorandum, will reply by endorsement to the accrediting authority, in the time specified, the following:

1 Corrective actions taken by the school to prevent the recurrence of deficiencies for those items listed as "NO GOs" on the accreditation checklists.

2 Corrective actions taken by the school to ensure those checklist items where deficiencies were observed but the school fixed during the accreditation do not recur.

(d) If the accrediting authority, upon receipt of the RBE, is satisfied with the results of corrective actions, issue an accreditation certificate to the school.

(3) **Non-Accreditation**:

(a) The accreditation authority will notify the school by memorandum of non-accreditation. At that time, it will become official that the school, if accredited previously, will have its accreditation rescinded.

(b) The accreditation authority will schedule a follow-up evaluation at a time determined by the proponent after the school's receipt of the non-accreditation report. The accrediting authority will mail the memorandum via mail and contact the school by telephone to make preparations for a follow-up visit.

(c) The school will provide to the accreditation authority, 15 days prior to the follow-up visit, a RBE providing---

1 Corrective actions taken by the school to correct the deficiencies as "NO GOs" on the accreditation checklists.

2 Corrective actions taken by the school to ensure those checklist items, where deficiencies were observed but which the school fixed during the accreditation, do not recur.

(d) The accreditation authority will conduct a follow-up visit to inspect those courses or areas in the school that did not meet accreditation standards. It is not necessary to inspect those courses or areas of the school that met accreditation standards during the initial accreditation visit.

(e) The accreditation authority will issue an accreditation certificate to the school if it is found that the school corrected the deficiencies.

Withhold Non-accreditation Based on HHI

f. Withhold non-accreditation based on higher headquarters' issues (HHI):

(1) The accreditation authority may issue a withhold or non-accreditation of a school or course when the school is unable to meet training standards due to higher headquarters' issues.

(2) Schools must exhaust all efforts to rectify problems with higher headquarters. The efforts must be well documented.
(3) The accreditation authority will study the documented efforts of the school to fix its problems with the higher headquarters and make an accreditation determination.
(4) The following will take place should the accreditation authority determine that a school will receive a withhold or non-accreditation due to HHI.
(a) Issue a memorandum of withhold or non-accreditation to the school and furnish a copy to the higher headquarters involved.
(b) Coordinate with all parties involved with the school and higher headquarters to resolve the issues affecting the accreditation.
(c) Once the issues are resolved between the school, higher headquarters, and the accreditation authority, the school and accreditation authority will follow the actions outlined in Paragraph III-2-7e above.

Evaluation Results

g. Information on team chief guidance and packaging of evaluation results follows:
(1) For any school accredited, the packet of evaluation results will contain only one checklist for Training Support.
(2) For Conduct of Training, use a separate checklist for each course evaluated.
(3) The accreditation evaluation team chief makes the overall recommendation on whether to accredit, non-accredit, or withhold accreditation based on evaluation of the organization and courses taught. Input for team chief consideration should include---
(a) All evaluation checklists and comments.
(b) The school battalion's current ISE or Training Status Report (TSR).
(c) All TO reports since the previous accreditation.

In-Briefing, In-Process Review, and Out-Briefing

h. Active component TASS Training Battalions and OCONUS TASS Training Battalions will typically be evaluated for accreditation during a single week. For these evaluations, the team chief should conduct an in-briefing at the beginning, an in-process review (IPR) at about halfway through the evaluation week, and an out-briefing at the end. Further description of these events follow:

Event	Description
(1)In-briefing	The in-briefing will include--- (a) Introduction of accreditation team members. (b) Overview of accreditation ratings and standards for accreditation. (c) Tentative date, time, and location of the IPR. (d) Date, time, and location of the out-briefing.
(2)In-process Review	(a) The IPR will be conducted IAW a schedule agreed to by the team chief and the school battalion commander. (b) The purpose of the IPR is to inform the school battalion commander of the team's findings. (c) Each area should be briefed in detail so the commander knows exactly what is wrong/what corrective actions must be accomplished. (d) The IPR must allow the school battalion commander the opportunity to surface differences, issues, and problems.

	(e) The team chief will determine how to resolve differences, issues, and problems.

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In-Process Review, and Out-Briefing

Event	Description
(3)Out-briefing	(a) The out-briefing is a formal presentation of the accreditation team's findings and recommendations. It will include--- 1 The recommended accreditation rating. 2 Evaluation results for each of the two categories on the checklist. These findings will be briefed with any corrections made since the IDT Phase of the evaluation, if applicable. (b) **Required Corrective Actions**. If the recommended accreditation rating is Non Accredit or Withhold Accreditation, specify corrective measures the school must accomplish to be accredited.

Note: Evaluation visits to TASS schools in CONUS represent a small piece of the accreditation picture and do not require in- or out-briefings. The team chief may offer to conduct an IPR for the school battalion commander as a courtesy.

III-2-8. Report Format

Report Format

The accreditation report will be formatted IAW sample format in TR 351-18 and will contain the elements listed in the following table:

Paragraph	Title/Description
One	**Recommended Accreditation Rating**. This will be a simple statement of the recommended accreditation rating and listing of courses observed.
Two	**Other evaluation input**. Include source and location of other accreditation evaluations considered in this recommendation.
Three	**Strengths**. List significant strengths which merit general officer attention.
Four	**Shortcomings**. List major shortcomings . If the recommendation in paragraph one is to non-accredit or withhold accreditation, "Shortcomings" should immediately follow in the second paragraph.
Five	**Higher Headquarters' Issues**. Identify problems requiring corrective action by some agency beyond the control of the school battalion commander (e.g., TRADOC, Forces Command (FORSCOM), U.S. Army Europe (USAREUR), US Army Pacific (USARPAC), Eighth US Army (EUSA), USARC, NGB, TAG, Regional Support Command (RSC), RCE, etc.) Do not refer a problem to higher headquarters without having an audit trail clearly showing that the chain of command to the higher headquarters has been unable or unwilling to correct the problem.
Six	**General Comments**. Include anything that does not fall under the first four paragraphs. This could include problems which are not yet higher headquarters' issues but could become such if not soon resolved.
Seven	**Team Chief and Evaluators**. List names and ranks or titles.
Eight	**Point of Contact (POC)**. Provide the name and phone number of the Training/TD (Task) Proponent DOES point of contact.

III-2-9. Report Routing and Suspense

Interim and and Final Accreditation Reports

a. Interim and final accreditation report guidance is a follows:

(1) Interim Accreditation Reports	(a) Interim reports are required for IDT evaluations of TASS Training Battalions.
	(b) Upon completion of IDT evaluation, if the interim report indicates non-accreditation, the team chief will immediately send it to the appropriate addressees in the Report Distribution Table. For those that indicate accreditation, the report is forwarded to the school evaluated. All IDT evaluations are part of the accreditation report and will be distributed as outlined in the Report Distribution Table NLT 45 days upon completion of the accreditation visit.
	(c) The interim report will be mailed NLT 30 days after completion of the IDT visit.
(2) Final Accreditation Reports	(a) The Training/TD (Task) Proponent will process the accreditation report, commandant's letter of accreditation, and accreditation certificate.
	(b) The Training/TD (Task) Proponent commandant makes the final accreditation decision and signs the letter and the certificate.
	(c) The evaluation team chief furnishes a copy of the letter and the report to the addressees in the Report Distribution Table.

Report Distribution

b. Distribute the complete packet per the following Report Distribution Table:

The team chief of---	Sends the complete original packet to---	And furnishes a copy to---
AC NCOA in USAREUR	Commander, 7th Army Training Command	Commander, USAREUR and 7th Army Commander, TRADOC, ATTN: ATED
AC NCOA in USARPAC	Commander, 25th Infantry Division (Light)	Commander, USARPAC Commander, TRADOC, ATTN: ATED
AC NCOA in EUSA	Commander, EUSA, ATTN: EAJC-TD	Commander, TRADOC, ATTN: ATED
AC TRADOC NCOA	Commandant, Proponent School	Commander, TRADOC, ATTN: ATED
AC FORSCOM NCOA	Appropriate Corps, Division, or Brigade Commander	Commander, FORSCOM, ATTN: AFOP-TRI Commander, TRADOC, ATTN: ATED
AC Drill Sergeants School (DSS)	Installation Commander	Commander, TRADOC, ATTN: ATED
ARNG TASS school battalions	Commander of appropriate School Brigade	Director, Army National Guard, ATTN: NGB-ART-I (for ARNG school battalions) TAGs of the states involved in the accreditation (for ARNG school battalions) Regional TRADOC RCEs Appropriate DIV(IT) Commander, FORSCOM, ATTN: APOP-TI Commander, TRADOC, ATTN: ATED

Report Distribution (continued)

The team chief of---	Sends the complete original packet to---	And furnishes a copy to---
USAR TASS school battalions in CONUS and Puerto Rico	Commander of appropriate School Brigade	Chief, Army Reserve, ATTN: DAAR-OP-IT Commander, USARC, ATTN: AFRC-OPT-I Commander of appropriate Division (IT) Commander, FORSCOM, ATTN: AFOP-TI Commander, TRADOC, ATTN: ATED
USAR TASS school battalions OCONUS	Commander of appropriate School Brigade	Chief, Army Reserve, ATTN: DAAR-OP and one of the following: • Commander, USAREUR, (ATTN: AEAGC-T) (for Germany-based USAR school battalions), or • Commander, USARPAC, (ATTN: APOP-TR) (for Pacific-based USAR school battalions) Commander, TRADOC, ATTN: ATED

III-2-10. Corrective Actions

Corrective Actions After a Second Consecutive Non-accreditation

a. If a school's accreditation is rescinded and the school fails to meet accreditation standards during the follow-up evaluation, the accreditation authority will send a memorandum of non-accreditation through Commander, TRADOC to the appropriate command. Command staffs responsible for carrying the consequences of non-accreditation will receive a copy of the memorandum. The memorandum will advise them that the school (whose accreditation has been previously rescinded) failed to meet accreditation standards upon reevaluation. The memorandum will include the following:

(1) School's authority to teach TRADOC-approved proponent courses is withdrawn. Soldiers currently attending and who are in-processing to attend training may complete training.

(2) Proponent schools, ATSC, and other agencies will no longer provide training materials to the non-accredited school.

(3) NGB/USARC/Proponent/FORSCOM/USARPAC/USAREUR will non-conduct the remaining schedule classes in ATRRS. In case of a TASS region where one of the Region's RTIs failed to meet accreditation standards, when the ATRRS reflects a non-conduct of the remaining classes, the accreditation authority will provide a certificate of accreditation to the region. This authorizes the region to conduct training less the non-accredited RTI.

(4) HQ TRADOC (ATTN: ATED) will provide electronic notification of non-accreditation to the appropriate agencies and commands to ensure compliance with the above requirements.

(5) In instances where a proponent's school or course taught by the school receives a non-accreditation, DCSPER will accommodate soldiers to attend courses at other training sites authorized to teach the proponent's courses.

Procedures for Reinstatement of Accreditation

b. The following actions must happen for reinstatement accreditation and authorization to teach TRADOC-approved proponent courses:

(1) Commanders of non-accredited schools must request in writing, through command channels, an evaluation for reinstatement. The request must include the following:

(a) A detailed report of actions taken to correct all deficiencies.

(b) A list of not more than three courses the school proposes to conduct during the reinstatement evaluation. Schools that teach only one course, i.e., PLDC, will schedule one class with the minimum class size.

(c) Proposed course dates and request date for the reinstatement evaluation.

(d) If desired, a request for an assistance visit. Note: If requested, the assistance visit must take place a least 6 months prior to the reinstatement evaluation visit.

(e) An estimate of the number of students expected to enroll in each course.

(f) Coordination with NGB/USARC/Proponent/MACOMs to schedule up to no more than three classes for the purpose of reinstatement evaluation

(2) If the reinstatement evaluation request is approved, the accreditation authority will conduct an accreditation evaluation of all areas in Training Support and Conduct of Training, with particular emphasis on prior deficiencies.

(3) If the accreditation authority reinstates accreditation, all command and staffs previously notified of non-accreditation will receive a copy of the accreditation authority's Memorandum of Reinstatement of Accreditation. The memorandum will serve as the authority to rescind all adverse actions described herein. The memorandum will include the following:

(a) School's authority to teach the TRADOC-approved proponent courses is authorized.

(b) Proponent schools, ATSC, and other agencies will immediately begin to provide training materials to the school.

(c) GB/USARC/Proponent/FORSCOM/USARPAC/USAREUR will schedule the school's courses in ATRRS.

(d) HQ, TRADOC (ATTN: ATED) will provide electronic notification of accreditation reinstatement to the appropriate agencies and commands to ensure compliance with the above requirements.

(4) The adverse consequences of non-accreditation takes time and close coordination to rescind. When requesting a reinstatement accreditation, it is the responsibility of the commander of the non-accredited school (and the appropriate MACOM) to ensure availability of soldiers, instructors, course materials, training aids, equipment, and all other administrative, logistical, and service support required to conduct training and meet accreditation standards.

(5) Soldiers who attend courses conducted as part of a reinstatement effort will not suffer any consequences by the situation, regardless of the outcome of the reinstatement evaluation decision. Soldiers will graduate who successfully complete courses conducted during a reinstatement evaluation as though it were a normal course.
(6) Upon successful completion of a reinstatement evaluation, the accreditation authority will issue a certificate of accreditation to the school. In case of a region where one of the region's RTIs was excluded from the region's accreditation (ref Paragraph III-2-10a above), the accreditation authority will issue a new accreditation certificate accrediting the entire region.

Chapter III-3

Training Product/Material Validation

III-3-1. Chapter Overview

Introduction a. This chapter describes the training product/material validation process and provides guidance on conducting this validation.

Chapter Index b. This chapter covers the following:

Content	Paragraph
Administrative Information	III-3-2
Validation Description and Requirements	III-3-3

III-3-2. Administrative Information

Purpose a. Validation is a type of evaluation used to determine the efficiency and effectiveness of a new or revised training product/material in training the target audience to accomplish the established learning objectives. It is a quality control process.

References b. Required regulatory reference: other chapters this regulation:
(1) Chapter III-1, Evaluation and Quality Assurance Program Description and Requirements
(2) Chapter VI-8, Training Course Development

Definitions c. See the Glossary for TD-related terms. An understanding of the following terms is necessary for this chapter:
(1) Evaluation.
(2) Terminal learning objective.
(3) Enabling learning objective.

Responsibilities d. See Appendix B, Responsibilities, for top-level TD-related responsibilities. Specific Training/TD (Task) Proponent responsibilities related to validation are as follows:

(1) Validate all training products/materials, to include, but not limited to, training courses; correspondence courses/subcourses; Interactive Multimedia Instruction (IMI); Training Aids, Devices, Simulators, and Simulations (TADSS); Armywide Doctrinal and Training Literature Program (ADTLP) products; audiovisual products; and job aids prior to reproducing, implementing, or distributing training.

Note: Resident course validation may be conducted during the first three iterations to save time and resources. Make every effort to include all procedures. However, non-resident DL course modules must be validated prior to reproduction and distribution.

(2) Validate all tests before they are implemented.

(3) Use validation feedback to improve training products/materials.

(4) Obtain command approval of validated products. See appropriate product chapter in this regulation for appropriate command approval authority.

III-3-3. Validation Description and Requirements

Description a. Validation is the process used to determine if new/revised courses and training products/materials accomplish their intended purpose efficiently and effectively. It is the process used to determine if training accomplishes its intended purpose. Validation and revising training are continuous actions in the teaching/revising process of training improvement. Validation of products and materials involves ---

(1) Individual and/or group validation trials depending upon the nature of the training product.

(2) Verification of their training effectiveness in training the objective.

(3) Determination of beneficial improvements in the quality of training products and materials.

(4) Identification of training product deficiencies.

(5) Improvement of efficiency, effectiveness, and utility of training objectives, structure, sequence, products, and materials. In the "testing" context, it is the process of determining the degree of validity of a measuring instrument (e.g., skill qualification, end-of-module, and end-of-course comprehensive tests).

Note: Validation is of the training products themselves, **not** the training site.

Output b. Validation of all training products is a **minimum essential requirement** of the SAT process. Required outputs are marked with an asterisk:

***(1) Validated and approved training materials and products.

*(2) Trained instructors and key personnel in the use of the validation training products/materials.
(3) Information useful to improving training products/materials.

Start point c. A training product/material validation is conducted just prior to preparing the camera ready copy (CRC).

Procedures d. Follow the steps in this table to validate and revise training products/materials.

Step	Action
(1)	Plan validation trials for all training products/materials, including tests. (a) Identify validation requirements. (b) Coordinate with validation location. (c) Ensure availability of --- 1 Personnel (See "Target Audience Sample," this chapter). 2 Appropriate target audience sample representation. See "Target Audience Sample" (this chapter). 3 Necessary space, facilities, and equipment availability. 4 Training products and materials. 5 Administrative support requirements. (d) Prepare personnel response forms, interview forms, and questionnaires.
(2)	Plan and conduct instructor and key personnel training (IKPT).
(3)	Conduct individual and/or group validation trials depending upon the nature of the training product.

If you conduct	Then see..
Individual validation trials	"Individual Validation Trials" (this chapter).
Group validation trials	"Group Validation Trials" (this chapter).

(4)	Act on validation determination(s).

Target Audience Sample

e. The target audience sample is the group (of soldiers or civilians holding the particular job) used to validate the training products and materials. The target audience sample must consist of ---

(1) Soldiers or civilians with the prerequisites for the training.
(2) Non-performers of the training product objectives being validated.
(3) Total Army (Active and Reserve Component) receivers of the training/product.

Instructors and Key Personnel

f. Active and Reserve Component instructors and key personnel assisting with validation procedures must be trained in use of the training products and materials for their respective areas. If these personnel are not trained, their inexperience with using and presenting the products may affect validation.

Individual Validation Trials

g. Individual trials pinpoint weaknesses and problems with training products and materials that need correcting before group trials are conducted. They are used to detect gross errors and inconsistencies before a statistical validation. To conduct individual trials, follow these steps:

Step	Action
(1)	Brief soldiers/civilians on their role in validation trials.
(2)	Implement the training with the target audience representation.
(3)	Observe individual use of training products and materials.
(4)	Determine necessary improvements through --- (a) Questionnaires. (b) Interviews. (c) Observation.
(5)	Make indicated corrections to training products and materials.

Group Validation Trials

h. Group trials are used to collect and analyze statistical data to statistically confirm the training effectiveness of the products and materials.

Step	Action	
(1)	Conduct fixed sample or sequential testing group validation method.	
	Fixed sample method	(a) Requires a sample target audience minimum of 30 soldiers/civilians. (b) Uses the scoring of the training product criterion-referenced test.
	Sequential testing method	(a) Requires 4 - 29 soldiers/civilians representing the target population. (b) Plots post-test results on a mathematically constructed grid.
(2)	Determine necessary improvements through analysis of the findings.	
(3)	Make indicated corrections to training products and materials.	

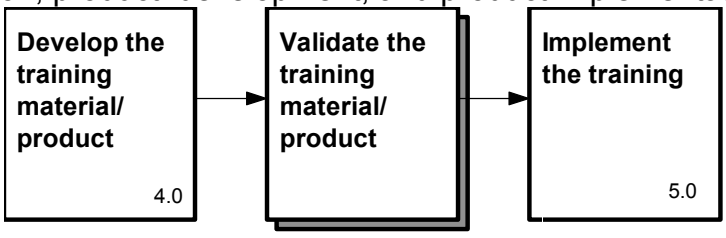
Process Completion

i. The validation is complete when the training program or product is determined to be valid and approved for implementation.

Note: Validation and revising training are continuous actions in the teaching/revising process of training improvement

Flow Diagram

j. The following flow diagram depicts the relationship between validation, product development, and product implementation.



Quality Control

k. For quality results from the validation process, all personnel involved must ensure ---
(1) Target audience is correctly sampled.
(2) The new/revised training product/material accomplishes its intended purpose efficiently and effectively.
(3) Action on validation results/findings.

Chapter III-4

Evaluating Instructor Performance

III-4-1. Chapter Overview

Introduction

a. This chapter provides criteria for evaluation of ---
(1) Basic instructor performance --- these criteria are required of all instructors regardless of the method or media used or the training site.
(2) Classroom instructor performance.
(3) Video teletraining (VTT) instructor performances.
(4) Small group instructor performances.
(5) Preparation for and conduct of the After Action Reviews (AAR).

Note: The reproducible checklists for each of these evaluations can be found at the back of this chapter.

Chapter Index

b. This chapter covers the following:

Content	Para Number
Instructor Evaluation Criteria - All Instructors	III-4-2
Basic Instructor Performance Checklist	III-4-3
Classroom Instructor Performance Checklist	III-4-4
Video Teletraining (VTT) Instructor Performance Checklist	III-4-5
Small Group Instructor Performance Checklist	III-4-6
After Action Review (AAR) Checklist	III-4-7

III-4-2. Instructor Evaluation Criteria – All Instructors

Basic Instructor Performance

a. The following criteria applies to all instructors regardless of whether the training is conducted in a traditional classroom, in a small group environment, or via video-teletraining. The Basic Instructor Performance Checklist can be found at paragraph number III-4-3. The checklist provides greater detail for evaluating these criteria. To meet acceptable performance standards, the instructor must ---
(1) Implement risk control measures.
(2) State Terminal Learning Objective.
(3) Demonstrate technical or tactical competence.
(4) Introduce the instruction.

(5) Present learning steps/actions.
(6) Explain the relationship of task or training activity to job performance.
(7) Generate questions/obtain feedback.
(8) Use training aids to support learning.
(9) Ensure that all students can see and hear all activities.
(10) Exhibit acceptable personal appearance.
(11) Demonstrate basic delivery skills.
(12) Use appropriate questioning techniques.
(13) Facilitate student performance.
(14) Exhibit respectful behavior.
(15) Provide interim and concluding summaries.
(16) Demonstrate effective management of training resources.
(17) Conduct AAR.

Classroom Instructor Performance

b. These additional criteria apply to instructors who are training in a classroom environment. The Classroom Instructor Performance Checklist can be found at Paragraph III-4-4. In addition to the basic instructor performances, the classroom instructor must ---

(1) Manage the training environment to promote learning, comfort, safety, and hygiene.
(2) Maintain a Visitors Folder in accordance with local policy.

VTT Instructor Performance

c. These additional criteria apply to instructors who are conducting training via VTT. The Video Teletraining (VTT) Instructor Performance Checklist can be found at Paragraph III-4-5. In addition to the basic instructor performances, the VTT instructor must ---

(1) Establish eye contact with the camera.
(2) Operate the media effectively.
(3) Develop and use effective visual aids.

Small Group Instructor Performance

d. These additional criteria apply to instructors who are conducting small group training. The Small Group Instructor Performance Checklist can be found at Paragraph III-4-6. In addition to the basic instructor performances, the small group instructor must ---

(1) Demonstrate the three small group roles.
(2) Facilitate the group during the Experiential Learning Cycle.

AAR Instructor Performance Checklist

e. These criteria apply to all instructors. The AAR Instructor Performance Checklist can be found at paragraph III-4-7. In addition to the basic instructor performances and any other appropriate criteria, the instructor must ---

(1) Prepare AAR outline.
(2) Prepare the training area for the AAR.
(3) Introduce the purpose for the AAR.
(4) Present training events for consideration.
(5) Facilitate student participation.

III-4-3. Basic Instructor Performance Checklist

Basic Instructor **for** Checklist

To achieve a satisfactory rating, the instructor must receive a "GO" rating for Instructor Actions 1 through 3 and must receive no more that three (3) ratings of "NO-GOs" Instructor Actions 4 through 17.

Instructor Action	GO	NO-GO
1. Risk Control Measures ("a" through "d" required for a "GO" rating): a. Provided WARNINGS for training safety hazards. b. Identified high risk assessment level. c. Emphasized environmental hazards. d. STOPPED practice or testing when dangerous situation occurred.		
2. Terminal Learning Objective**:** Stated the action, conditions, and standard.		
3. Technical or Tactical Competence ("a" and "b" required for a "GO" rating): a. Responded to standard questions relating to objectives. b. Conducted demonstrations and exercises when appropriate.		
4. Introduction ("a" through "d" required for a "GO" rating): a. Used motivator. b. Explained --- (1) Difference between training and task performance on the job. (2) How performance will be tested. (3) Why task is important. (4) Risk assessment level. (5) Environment protection considerations. c. Defined new terms. d. Provided WARNINGS and CAUTIONS for training safety and job safety.		
5. Learning Steps/Actions ("a" through "f" required for a "GO" rating): a. Explained and/or replicated cues. b. Showed steps in parts. c. Asked questions. d. Explained key points. e. Covered material in lesson plan. f. Used --- (1) Logical sequence. (2) Smooth transitions.		
Job Performance Context: Explained relationship of task or training event to the performance soldier will carry out in the job environment.		

7. Questions and Feedback ("a" through "e" required for a "GO" rating): **a. Engaged students every 3 to 6 minutes.** b. Asked or answered questions. c. Stopped for discussion. d. Asked for feedback. e. Actively involved all students.		
8. Training Aids ("a" and "b" required for a "GO" rating): **a. Ensured training aids/equipment were operational** **b. Used ---** **(1) Training aids/training equipment properly.** **(2) Legible and appropriate visuals.**		

Instructor Action	GO	NO-GO
9. Facilitation of Student Ability to See and Hear ("a" and "b" required for a "GO" rating): a. Asked students if they could see and hear instruction. b. Corrected any identified situations where student was unable to see or hear instruction.		
10. Personal Appearance: Demonstrated well-groomed appearance, confident bearing, enthusiasm, no distracting mannerisms.		
11. Basic Delivery Skills: Used appropriate gestures, movement, communication skills (clear enunciation; appropriate speech volume, tone and rate; good grammar and choice of words with minimum "crutch" words.)		
12. Questioning Techniques: Conducted Ask-Pause-Call techniques (also called pose/pause/pounce) for conference and direct questioning during practice exercises or one-on-one questions.		

13. Facilitate Student Performance ("a" through "c" required for a "GO" rating): **a. Provided frequent 'checks on learning' and practice opportunities (usually over 50% for module or lesson prior to testing).** b. Conducted practice sessions that included-- (1) One best way (correct demonstrations). (2) Student activity that matched or closely modeled required job performance. (3) Practice in parts. (4) Shaping of student skills. (5) Specialized individual help when needed. (6) Answers to student questions. (7) On-the-spot correction and praise. (8) Immediate stopping of practice when dangerous situation occurred. c. Conducted performance tests that included --- (1) Preparation of test conditions. (2) Briefings to students. (3) Presentation of performance cues. (4) Observation of student performance without interruption except for intervention for safety purposes.		
Respectful Behavior: Displayed no signs of put downs, sarcasm, off-color material, or sexist/racist/ethnic remarks.		
Summaries of Instruction: Provided interim (when appropriate) and concluding summaries.		
16. Training Resource Management ("a" through "d" required for a "GO" rating): **a. Ensured availability of sufficient materials and resources.** b. Retained control of class. c. Managed disruptive students d. Used instructional time wisely.		
17. After-Action Review: Conducted AAR following field exercise, practical exercise, or testable module. *Note:* **The AAR Instructor Performance Checklist is at paragraph III-4-7.**		

III-4-4. Classroom Instructor Performance Checklist

Classroom Instructor Checklist

To achieve a satisfactory rating, the instructor must receive a "GO" rating for both Instructor Actions.

Instructor Action	GO	NO-GO
<u>Training Environment</u> ("a" through "j" required for a "GO" rating). Ensured classroom met safety, comfort, and hygiene standards, to include --- a. Ventilation. b. Lighting. c. Temperature. d. Noise levels. e. Interruptions. f. Visibly posted safety signs. g. Availability and use of safety equipment. h. Placement of observer station. i. Cleanliness. j. Adequate space for planned activities.		
2. <u>Visitors Folder</u>: Maintained Visitors Folder in accordance with local policy.		

III-4-5. Video Teletraining (VTT) Instructor Performance Checklist

VTT Instructor Checklist

To achieve a satisfactory rating, the VTT instructor must receive a "GO" rating for all three Instructor Actions.

Instructor Action	GO	NO-GO
<u>Eye Contact</u>: Established and maintained appropriate eye contact with main camera.		
2. <u>Operation of Media</u>: Exhibited fluent operation of VTT equipment.		
3. <u>Effective Visuals</u> ("a" through "e" required to receive "GO" rating). Developed and used visuals that --- a. Are legible. b. Relate to the objective. c. Exhibit consistent visual design. d. Display proper grammar and spelling. e. Conform to TV limitations.		

III-4-6. Small Group Instructor Performance Checklist

Small Group Instructor Checklist

To achieve a satisfactory rating, the small group instructor must receive a "GO" rating for both Instructor Actions.

Instructor Action	GO	NO-GO
1. <u>Small Group Roles</u> ("a" through "c" required for "GO" rating). Demonstrated --- a. Subject-Matter Expert (SME) Role. b. Facilitator Role. c. Observer Role.		
2. <u>Experiential Learning Cycle (ELC)</u> ("a" through "d" required for "GO" rating). Facilitated group in each ELC stage, to include --- a. Publishing Stage. b. Processing Stage c. Generalizing Stage. d. Applying Stage.		

III-4-7. After Action Review (AAR) Performance Checklist

AAR Performance Checklist

To achieve a satisfactory rating, the instructor conducting the AAR must receive a "GO" rating for ALL Instructor Actions.

Instructor Action	GO	NO-GO
1. <u>AAR outline</u>. Developed content outline.		
2. <u>Training Area preparation</u>. Prepared appropriate room or training area.		
3. I<u>ntroduction</u> ("a" through "c" required for "GO" rating). Stated --- a. AAR purpose. b. Training objective. c. Ground rules.		
4. <u>Presentation</u> ("a" through "c" required for "GO" rating). Presented chronological list of training events and facilitated student discussion of each event, to include the following --- a. What they observed. b. What went right (i.e., what was successful). c. What could/should be done differently.		

5. Facilitation ("a" through "d" required for "GO" rating): a. Asked questions which involved students and led them to clarify points. b. Listed points discussed for all to see. c. Summarized AAR highlights. d. Kept students focused on AAR activities and purpose.		

TR 350-10, para 2-15.

2-15. Accreditation. TRADOC Regs 350-18 and 350-70 govern accreditation. TRADOC accreditation evaluation reports, report of corrective actions, and proponent evaluations will be maintained for use during the next accreditation visit.

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Standard 46 Reference Excerpts

See: FM 7-100 (draft); FM 7-100-1 (draft); FM 7-100-2 (draft); FM 7-100-3 (draft)

See: FM 3-0, OPFOR

See: COE White Paper, May 2001

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Tab 47

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Standard 47 Reference Excerpts

AR 351-1, para 1-5, Mission.
The mission of the Army School System is to—
a. Provide progressive and sequential leader training which prepares those leaders to execute the Army's operational doctrine in war or peace.

b. Support training research and system development.

c. Take part in the formulation of military doctrine.

d. Develop individual proficiency training which results in the award of a special skill identifier (SSI), a military occupational specialty (MOS), or an additional skill identifier (ASI).

e. Develop strategy for export of training programs to the unit level.

f. Promote the highest standard of professional military competence.

TR 350-6, para 1-5, Objectives for IET.
a. Purpose: Provide the Army with military occupational specialty qualified (MOSQ) soldiers.

(1) An IET soldier is MOSQ upon successful completion of all BCT and AIT/OSUT requirements. The MOSQ soldier can perform to standard the institutionally taught critical Skill Level 1 tasks identified by the MOS proponent.

(2) The MOSQ soldier also demonstrates a willingness to live by the Army's core values, and has the ability to work effectively as a team member under stressful conditions.

(3) The MOSQ soldier is prepared to immediately contribute to the successful accomplishment of their unit's mission, and can survive and operate effectively in a stressful tactical environment.

b. Specific objectives:

(1) Provide each IET soldier with the skills, knowledge, and attributes to immediately contribute to their unit's mission and survive in a stressful tactical environment.

(2) Provide the Army with mentally and physically fit soldiers who are capable of performing their duties in any environment under significant stress.

(3) Inculcate in the IET soldier an understanding of, and a willingness to live by, the Army's core values: Loyalty, Duty, Respect, Selfless Service, Honor, Integrity, and Personal Courage (LDRSHIP). These values will be instilled during BCT/OSUT and reinforced throughout AIT.

(4) Ensure each IET soldier understands the importance of teamwork and develops the capability to work effectively as a team member under stressful conditions.

(5) Promote and instill in the IET soldier the highest degree of individual responsibility, self-discipline, and self-respect. This includes demonstrating respect for others. The soldier accepts the Uniform Code of Military Justice (UCMJ) and other

statutes and applicable rules as the standard of appropriate conduct, both on and off duty.

(6) Promote and instill in every IET soldier the professional pride, dignity, and bearing associated with being a soldier in the United States Army. This includes inculcation of the tenets of their enlistment obligation, the Oath of Enlistment, and the Soldier's Code.

(7) Teach each soldier to value health of the mind, body, and spirit, and recognize its impact on quality of life and unit readiness. This includes adherence to the objectives of the Army's Health Promotion Program (i.e., good diet, adequate exercise, abstinence from drugs and tobacco products, elimination of alcohol abuse, management of stress, regular health checkups, and spiritual and moral growth).

(8) Develop in the IET soldier the knowledge, understanding, and appreciation of Army customs, heritage, and traditions. This includes development of an understanding of the role of the Army in the defense of the United States throughout its history, and the principles upon which today's Army was founded.

c. In addition to attainment of the central objectives listed above, every IET soldier is required to meet the qualification requirements specified in the course Student Evaluation Plan (SEP) or other appropriate course documentation. These requirements include, but are not limited to:

(1) Basic Combat Training and Phases I-III of OSUT:

(a) Complete the Army Physical Fitness Test (APFT) with a minimum of 50 points in each event, 150 points total.

(b) Qualify with individual weapon.

(c) Pass all end-of-phase tests (Phases I-III).

(d) Complete all obstacle and confidence courses as prescribed in the appropriate TSP.

(e) Complete bayonet and pugil training as prescribed in the appropriate TSP.

(f) Complete hand-to-hand combat training as prescribed in the appropriate TSP.

(g) Throw two live hand grenades and negotiate the Hand Grenade Qualification Course as prescribed in the appropriate TSP.

(h) Complete the Protective Mask Confidence exercise.

(i) Demonstrate a willingness to live by the Army's seven core values.

(j) Demonstrate the capability to operate effectively as a team member.

(k) Complete all foot and tactical road marches required by this regulation and the appropriate TSP.

(l) Complete all tactical field training and field training exercises (FTXs) required by this regulation and the appropriate TSP.

(2) Advanced Individual Training and Phases IV-V of OSUT:

(a) Pass the APFT at the ATC/TRADOC school with a minimum of 60 points in each event, 180 points total.

(b) Pass all end-of-phase tests.

(c) Demonstrate performance of MOS-specific critical tasks (tasks determined mandatory for the awarding of a MOS) as identified by the proponent school and as prescribed in the appropriate TSP.

(d) Complete all foot and tactical road marches required by this regulation and the appropriate TSP.

(e) Complete all tactical field training and FTXs required by this regulation and the appropriate TSP.

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Tab D

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Conduct of Training Job Aid

To assist evaluators with accreditations, the Accreditation Standards have been divided into three job aids in the TRADOC Accreditation Smart Book. These job aids are: Conduct of Training (COT), Training Support (TS), and Proponent Functions (PF). Each of these job aids has an Accreditation Standards List that has been modified to show only the Standards that apply to that area. In some cases, a Standard may be included in two areas. The “also” column in each of the three modified Accreditation Standards Lists will show if that Standard is included in another area. For example, Standard 1 is listed in COT and PF. Each Standard, within each job aid, has a two-page sheet to assist the evaluator in performing the accreditation. The front page has an administrative data section, guidance for that Standard, and a Met / Not Met rating. The back page is an Evaluator Worksheet to give the evaluators a place to write down their findings. Once the three separate Accreditation Standards Lists have been filled out, these ratings should be transferred to the Accreditation Standards List showing all 47 Standards. Once this is done, the Accreditation Team Leader will be able to determine the level of accreditation for that institution.

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ACCREDITATION STANDARDS LIST

for Initial Military Training, Reclassification Training, and Institutional Leader Development

ADMINISTRATIVE DATA

Organization being accredited	**Name:**	
	Location/address:	
Accrediting agency	**Name:**	
Accreditor:	**Name:**	**Phone: DSN:**
	e-mail address:	**Comm: (___)-___-____, ext**
	Address:	

REPORTING FOCUS

Type of Training (Check One)		**Initial Military Training**							
		Reclassification Training							
		Institutional Leader Development. (Indicate Education System)		**NCOES**		**WOES**		**OES**
Area Evaluated (Check One)		**Conduct of Training**							
		Training Support							
		Proponent Functions							

RECOMMENDATION

	Candidate		**Provisional**		**Fully Accredited**		**Other:**

REMARKS

(Attached additional comments should be keyed to item numbers.)

Conduct of Training (May include identification of Proponent Function [PF] deficiencies)					
ITEM NO.	**Standard**	**Met**	**Not Met**	**N/A N/O**	**Also**
1	Students can perform to the standards prescribed in the lessons.				PF
2	Instructors train students to the prescribed standards.				PF
3	Instructors meet qualifications and have evidence of proponent technical certification requirements				
4	Institution conducts training in compliance with safety hazard and environmental considerations identified in lesson plans, as well as installation training areas.				PF
6	Institution complies with established instructor-to- student and equipment ratios when presenting lessons.				
8	Instructors Conducts training in accordance with the mandatory training sequence.				
15	Institution provides students the opportunity to demonstrate their leadership, skills, and knowledge in a performance-oriented environment.				
16	Instructors have and use the required course materials.				
17	Instructors use training resources, to include ammunition, pyrotechnics, training equipment, TADSS, training materials, consumables, and references as prescribed.				PF
18	Institution uses ranges and training areas as prescribed.				PF
19	Instructors perform student academic counseling.				
20	Instructors/cadre serve as mentors, counselors, and role models.				
25	Institution administers criterion-referenced performance or performance-based tests in accordance with guidance.				PF
28	Institution conducts courses within minimum and maximum class size limitations				
29	Institution conducts on-site risk assessments and takes action as appropriate.				
30	Institution conducts after action reviews (AAR)/sensing sessions as required by the course material.				
31	Institution provides remedial training.				
32	Institution conducts physical fitness training.				
35	Institution has a policy for retraining students.				
36	Institution maintains student attendance records.				
46	Students demonstrate working knowledge of COE and OPFOR doctrine (ILD only).				
47	Institution ensures all soldiers/officers meet mandatory graduation requirements (IMT only).				

Name of Evaluator: _____ Date: _____

Program/Course/Lesson: _____

Instructor/POC: _____

Standard 1 *(COT)* Met / Not Met

Students can perform to the standard prescribed in the lessons.

Criteria:

- Students demonstrate that they can perform the objectives to prescribed standard.

Evaluation Guidelines:

- Observe training and check instructor supervision of student performance during practical exercises, performance tests, and checks on learning.
- Review student evaluation plans.

Comment if:

- Organization uses tests that were not created by the TD proponent.
- There are instances where appropriate feedback was not provided to students.

References:

TR 350-6, Ch 1,2,4,5 & Apx B&C (IMT only)
TR 350-70, Ch II-1-7, VI-6, VI-7 (Testing), & VI-8 (Development)
TR 350-10, para 2-7 (Conduct of Tng) & para 2-8 (Student Records)
TR 350-18, para 3-28 (Student Academic Records) & para 4-5 (Visitor Folders)
FM 25-100, CH 1 (Training Overview)
Student Records, CMP, POI, Lesson Plans

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 2 *(COT)* Met / Not Met

Instructors train students to the prescribed standards.

Criteria:

- Instructors verify that students can perform the LOs to prescribed standards by checking practical exercise and performance test results and observing student performance.
- Instructors comply with techniques of delivery and methods of instruction prescribed in TSP/lesson plan.

Evaluation Guidelines:

- **Observe, as a minimum, one ongoing lesson, to include a test or PE, for each course currently in session to ensure the organization is conforming to the instructional requirements.**
- Instructors may share operational assignment experience to facilitate learning, but must teach everything that is included in the approved lesson plan.
- Ensure organization has a waiver from the proponent for changes to lesson plans.

Comment if:

- The instructor fails to teach what is required of the lesson plan.
- Lesson plan requires an exercise, e.g., FTX, STX, and the school does not conduct the exercise, mark as a NO GO.
- The instructor does not require students to demonstrate that they can perform the LOs to the prescribed standards, mark as a NO GO.

References:

AR 351-1, para 1-5
TR 350-6, Chs 2&3 (IMT only)
TR 350-10, para 2-7g (Student Evaluations)
TR 350-18, paras 4-5 & 4-6 (Instructor Folders)
TR 350-70, Ch VI-8, Apx E
CMP, POI, Lesson Plan, Student Record (DAPs), TSP
EOCCs

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 3 *(COT ONLY)* Met / Not Met

Instructors meet qualifications and have evidence of proponent technical certification requirements.

Criteria:

- Instructors meet the common requirements for all instructors (e.g., graduate of Instructor Tng Course).
- Instructors meet the course qualification and certification requirements listed in the appropriate CMP, references, and proponent policy.
- Instructors have documentation of technical certification where appropriate.

Evaluation Guidelines:

- Evaluate the personnel records of instructors (including contract instructors) for all classes in session. (Instructor "qualification" refers to requirements for instructors to teach a particular course. Instructor "certification" refers to criteria specified by the proponent for instructors in that discipline.)
- Check every record for appropriate documentation (JA-004).
- Review courses for previous 12 months to determine if SGL and instructor grade requirements are being followed per TRADOC Reg 351-10, para 2-14b.
- Check for operator's permit, where applicable.

Comment if:

- Any and all deficiencies in this area.
- Issues are related to higher headquarters or the organizations outside of the institution's ability to control (i.e. HHIs).

References:

AR 614-200, paras 6-7, 6-9, & 6-12
DA Pam 611-21, para 11-2
TR 350-6, para 3-6/Apx F (IMT only)
TR 350-70, CH II-1 (S&FD)
TR 350-10, para 2-14b (SGL, SSGL, and Instructor Standards)
TR 350-18, paras 3-8 & 4-6 (Instructor Folders)
CMP - Course Qual & Cert requirements.
Proponent Instructor Certification Program
Instructor Records

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

INSTRUCTOR RECORDS (NCOES)								UNIT:										DATE:
COURSE: _____ NAME	**Cert /Memo Requesting Cert (1)**	**DA Form 2-1/PQR/ERB/NCOER (a) (1)**	**DA Form 705 (a) (1)**	**DA Form 5500-R/5501-R (If Applicable) (1)**	**Copy of any profiles (1)**	**TAITC Certificate**	**Course Taught Certificate (1)**	**SGITC Certificate**	**VTTITC Certificate (if required)**	**Orders awarding SQI "H" (1)**	**Initial Evaluation**	**1st Quarter Evaluation**	**2nd Quarter Evaluation**	**3rd Quarter Evaluation**	**4th Quarter Evaluation**	**REMARKS**

TRADOC 350-18
1. Para 4-6, a-i

TRADOC 351-10
a. Para 2-14, a(1)-(5)(d) p 10-11

AR 350-41
x. Para 12-2, f(2), p 22

Instructor Certification Program for NCOPD
y. p 3-3, 3-4, 3-6

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Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 4 (*COT)* Met / Not Met

Conducts training in compliance with safety hazard and environmental considerations identified in lesson plans as well as installation training areas.

Criteria:

- Safety hazard and environmental considerations are complied with when conducting training.
- Safety and environmental deficiencies identified during the current and previous training year have been adequately addressed. [Rationale: This is critical to ensure safety of personnel and equipment as well as compliance with laws and regulations.]

Evaluation Guidelines:

- Verify instructors provide safety information (briefing) at the start of the lesson.
- Check lesson plans for safety requirements and environment protection considerations and ensure instructor complies with lesson plan requirements.
- Observe at least one lesson that includes a PE for each course.
- Check training accident reports.
- Talk to the education/training organization/ installation safety and environmental office, students, instructors, medical facility personnel, if required.
- Check Risk Assessment Worksheet in Lesson Plans.
- Check Daily Risk Assessment Checklists for training.

Comment if:

- Any and all deficiencies in this area.
- Issues are related to higher headquarters or the organizations outside of the institution's ability to control (i.e. HHIs).

References:

AR 5-355 (Def Traffic Mgmt); AR 200-1 (Env Prot & Enhancement)
AR 200-2 (Env Effects of Army Actions); AR 200-3 (Natural Resources)
AR 385-10 (Army Safety Program); TR 385-2, para 4-4 (TRADOC Safety Program)
TR 350-70, Chs I-2 & VI-6; TR 350-6, Ch 3; TR 350-10, para 2-17; FM 100-14
FM 101-5; Applicable Range Control SOP; Installation Tng Area Usage Policy/Proc; TSP
Risk Assessment Form

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 6 *(COT only)* Met / Not Met

Complies with established instructor-to-student and equipment ratios.

Criteria:

- Instructor-to-student ratio is prescribed in the lesson plan(s).
- Lesson attendance does not exceed lesson/POI prescribed instructor-to-student or student-to-equipment ratios.
- Education/training organization has a waiver from the proponent to use other than lesson/POI prescribed ratios.
- Task analysis data conforms to guidance in TR 350-70 Ch VI-2 & ASAT.
- Critical task list is prepared IAW TR 350-70 guidance.

Evaluation Guidelines:

- Is the Instructor-to-student ratio prescribed in the lesson plan(s)?
- Observe training of at least one lesson for each course; determine compliance with presentation ratios.
- Check for waiver(s) to use other than lesson/POI-prescribed instructor-to-student or student-to-equipment ratios.
- Review critical task list audit trail and verify documentation, justification, and approval for any revisions. Verify that items shown comply with definition of a task. Compare to POI and check to determine if items unrelated to tasks are being trained.

Comment if:

- Repeated incidents of violating prescribed ratios and reasons.
- HHIs.

References:

TR 350-70, Ch VI-8 (Tng Dev)
TR 350-10, paras 2-13c (Ratios) & 5-11
CMP, POI, TSPs, Lesson Plans

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 8 *(COT only)* Met / Not Met

Instructors conduct training in accordance with the mandatory training sequence.

Criteria:

- Training schedules reflect all required lessons, prescribed hours of instruction, and mandatory training sequence, as stated in the CMP.
- Training schedules include sufficient preparatory/recovery time.
- Schedules include time for movement.

Evaluation Guidelines:

- Check training schedule for each course in session and compare with CMP.
- Compare mandatory training sequence (CMP) to training schedule to verify completeness and compliance (i.e. reflect all required lessons, prescribed hours of instruction and are taught in sequence).
- Check to ensure classes are conducted IAW the training schedule.

Comment if:

- School's training schedules do not reflect or deviate from the mandatory training sequence in the CMP.
- The training schedule doesn't match the hours reflected in CMP/POI/lesson.

References:

TR 350-6, Chs 2 & 3 (IMT only)
TR 350-70, Ch VI-6 (Design)
FM 25-101, Page 3-34 (Monthly Schedules)
Training Schedule, CMP, POI, Lesson Plan
Waivers

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 10 *(COT)* Met / Not Met

Organization follows test control procedures.

Criteria:

- All tests were administered IAW regulatory requirements and proponent provided procedures (TAG/CMP).

Evaluation Guidelines:

- Check to see that all tests are administered IAW regulatory requirements and proponent provided procedures (i.e. CMP and Institution's SOP).
- Check this item at education/training sites where tests are handled, stored, administered, or scored.

Comment if:

- There is evidence that institution fails to control test material (handle/store/administer/score tests) when required. (This is a cause for a NOT MET).
- There are cases when tests are not controlled IAW regulatory requirements and course documentation.

References:

TR 350-70, Ch VI-7(Testing), Apx E (CMP)
TR 350-10, para 2-9f (Test Security)
AR 611-5
DSSC CMP, CH 1
TRADOC Testing Memorandum, 1 Oct 01
Training Institution SOP, CMP, POI

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

TEST CONTROL JOB AID

SCHOOL BATTALION: _____

TRAINING SITE: _____

EVALUATOR: _____ **DATE: / /**

TEST CONTROL

	GO	NO GO
1. Have the Test Control Officer (TCO) and TCO alternate been appointed in writing? Ref: AR-611-5, para 2-1a (1), p 2-1.	☐	☐
2. Test administrator is assigned by the TCO and is fully responsible for: Ref: AR 611-5, Para 2-1, e(10), p 2-1.	☐	☐
a. Maintaining control over the use and security of all test items (tests, answer sheets, test administration, test results, etc. while in his/her possession, control, or charge.		
b. Supervising the administration of the test.		
c. Ensuring test is administered following standardized procedures.		
d. Collecting all test materials after the test is administered.		
e. Inventorying the test material immediately following the test.		
3. Is there a Test Control SOP that includes the following? Ref: AR 611-5, para 2-1e (2), p 2-1.	☐	☐
a. Procedures for requisitioning, handling, storing, scheduling, administration and scoring of the test. Ref: AR 611-5, para 2-1e (2) (b), p 2-1.		
b. Disposition of test material. Ref: AR 611-5, para 2-1e (2) (c), p 2-1.		
c. Procedures governing security of test material. Ref: AR 611-5, para 2-1e (2) (e), p 2-1.		
4. Designate, in writing, personnel who are authorized access to, and handling of test materials. Ref: AR 611-5, para 2-1e (3), p 2-1.	☐	☐
5. Insure all personnel in the testing facility are thoroughly indoctrinated regarding test security.	☐	☐
6. Insure that the testing facility SOP is reviewed by all personnel on their assignment to the testing facility, and quarterly thereafter. Ref: AR 611-5, para 2-1e (7), p 2-1.	☐	☐
7. Monitor all procedures prescribed in the test facility SOP. Ref: AR 611-5, para 2-1e (7), p 2-1.	☐	☐

	GO	NO GO
8. Insure all test results are reported as soon as possible to personnel. being tested. Ref: AR 611-5, para 2-1e (7), p2-1.	☐	☐
9. Inspected testing sessions to determine that tests are properly handled 2-1a (2) (b), p 2-1.	☐	☐

TEST SECURITY

1. Store test components in locked rooms or containers where they are not accessible to unauthorized personnel. Ref: AR 611-5, para 2-2a (2) (b), p 2-2.	☐	☐
2. Test components bear the designated FOR OFFICIAL USE ONLY or CONTROLLED ITEM (TEST MATERIAL). An exception to this will be answer sheets that have not been completed by students. Completed answer sheets will not be returned to students. Ref: AR 611-5, para 2-2a (4), p 2-2.	☐	☐
3. If the FOR OFFICIAL USE ONLY designation has not been preprinted on test components, the material will be so marked unless the material is expected from control requirements as stated IAW AR 611-5, para 2-2b(2), p 2-2.	☐	☐
4. Maintain an Inventory of Army Personnel Test Materials using DA Form 5159-R. The TCO or alternate will make quarterly inventory of the test materials using DA Form 5159-R. The inventory will include test booklets, administrative and scoring keys, and optical scanner test scoring machine control forms. Ref: AR 611-5, para 2-2b (1), p 2-2.	☐	☐
5. Test booklets, manuals, scoring keys, and optical scanner test scoring machine forms will be serial numbered for internal security control. The prefix to the serial number will consist of the office symbol of the activity or the next higher headquarters which has an assigned office symbol. Ref: AR 611-5, para2-2b (3), p 2-2.	☐	☐
6. All test components must be accounted for at all times. When test components, except unused answer sheets, are taken from and returned to the locked cabinets, exact counts of these components will be made. They will be recorded in the “Note” section of DA Form 5159-R. Ref: AR 611-5, para 2-2b (6), p 2-2.	☐	☐
7. Test materials, except for blank answer sheets, will be kept in locked rooms or containers when not in transit or actual use. Test scoring keys and optical scanner control forms will not be stored in the same drawer as test booklets and blank answer sheets. Only persons whose duties require use of the test materials will have keys and combinations to storage facilities. Ref: AR 611-5, para 2-2b (8), p 2-2 .	☐	☐

	GO	NO GO
TESTING OPERATIONS RECORDS		
1. The TCO will maintain records of the items listed below. Ref: AR 611-5, para 2-4b, p 2-4.	☐	☐
a. Requisitions for test materials.	☐	☐
b. Test materials received by automatic distribution or requisition. prescribed in TSP/Lesson Plan.	☐	☐
c. The reason for testing. Indicate whether the test is an initial, first retest or second retest	☐	☐
DESTRUCTION OF TEST MATERIALS		
1. The test control officer will maintain Test Answer Sheets and associated student papers until course completion, when they will be destroyed. Non-graduate/early release answer sheets will be retained for 24 months. Ref: AR 25-400-2, FN 601-222c, p 257	☐	☐
2. Test components (except for test answer sheets that have been filled in by test examinees) that have become mutilated or marked, through use, and cannot be made useable by erasing, transparent tape, or restapling will be destroyed. A destruction certificate is required. Ref: AR 611-5, para 2-2b (7), p 2-2.	☐	☐

NOTE: Until further guidance is provided by TRADOC, it is recommended that the Destruction certificate indicate the method of destruction and be signed by the individual who destroyed the testing material and be verified by a second individual.

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Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 15 *(COT)* Met / Not Met

Institution provides students the opportunity to demonstrate their leadership, skills, and knowledge in a performance-oriented environment.

Criteria:

- Education/training organization places students in challenging, performance-oriented environment throughout the day as prescribed by the lesson material.

Evaluation Guidelines:

- Review lesson materials and identify practical exercises and performance tests that provide for this opportunity.

Comment if:

- The lesson material does not provide for this opportunity.

References:

TR 350-6, Chs 1&3 (IMT only)
TR 350-10, paras 2-7 & 2-20 (Ldshp Assessment & Development)
FM 22-100, Apx B
CMP, Lesson Plans, SEP
Student Records

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 16 *(COT)* Met / Not Met

Instructors have and use the required course materials.

Criteria:

- A current course POI is available and it matches the lessons.
- The current proponent CMP (exportable courses only) is available and is being followed for presenting the course.
- The current, validated, proponent course lesson plans are available and are being used to teach the course.
- Instructors use proponent approved materials identified in the TSP.
- The instructor has immediate access to a current copy of all written student materials for the lesson being taught.
- A current class roster is available.

Evaluation Guidelines:

- Compare CMP, lesson plans, POI, tests, Student Evaluation Plan, and other course material for currency and alignment. (Do they match?).

Comment on:

- Instances where lesson plans do not match POI/CMP/tests.
- Instances of noncompliance with CMP (grounds for NOT MET).
- Instances where obsolete education/training materials are being used (grounds for NOT MET).

References:

TR 350-6, paras 3-2 & 3-6 (IMT only)
TR 350-10, para 2-7h (Training Material)
TR 350-18, para 4-5 (Visitor Folders)
TR 350-70, Chs VI-6, VI-7, & VI-8
CMP, POI, TSP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

CLASSROOM JOB AID

SCHOOL / BATTALION: _____
DATE: _____

	YES	NO	REMARKS
1. ***Visitor's folder*** will contain the following: a. Visitor sign-in log. b. ATRRS class roster. c. Student attendance register (TRADOC Form 270-R) (Sign-in/out Roster) d. Training schedule. e. Required references: (1) POI / CMP (2) Current lesson plan f. Instructor credentials to include: (1) Copy of instructor's proponent certification or copy of the memo to the proponent requesting certification (2) Operator's permit (if required) g. Critique sheets for class visitors. h. Daily Risk Assessment Worksheet.			*TRADOC Reg 350-18, Para 4-5*
2. Are copies of approved waivers in the classroom?			**COT Checklist**
3. Is a copy of all written student materials on the visitor table? (student handouts, etc.)			
4. Is the instructor following the approved lesson plan?			**TRADOC Reg 351-10, Para 2-13,2-14**
5. Is training scheduled in a logical sequence?			**CMP**
6. Is the class location suitable for training?			*TRADOC Reg 351-10, Para 2-7e*
7. Are safety requirements being explained and followed?			*TRADOC Reg 351-10, Para 2-18*
8. Are students motivated and learning?			
9. Are students and instructors in the same uniform?			
10. Is required equipment available and being used?			**POI**
11. Is instructor to student ratio being followed?			*POI, TRADOC Reg 351-10, Para2-13*
12. Is student to equipment ratio being followed?			*POI*

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Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 17 *(COT)* Met / Not Met

Instructors use training resources, to include ammunition, pyrotechnics, equipment, TADSS, training materials, consumables (e.g., spare parts, lubricants, student handouts), and references, as prescribed.

Criteria:

- Equipment and TADSS are used in the quantities and types and quantities required by the lesson.
- Required training support materials, consumable supplies, and references are distributed and used to conduct the training IAW course documentation.
- The education/training organization has sufficient multi-media, word processing, and internet capabilities for student use.
- The organization has a waiver from the proponent to use other than POI/TSP-prescribed ammunition, pyrotechnics, and equipment.
- All equipment/TADSS listed in the POI are maintained in a serviceable (operable) condition IAW applicable technical manual and are available and serviceable when needed.
- The organization maintains material (e.g., spare parts, lubricants, student handouts) inventories adequate to provide the required education/training when needed.
- The organization has adequate equipment tasking and scheduling procedures to ensure equipment is on hand to support training.
- The organization maintains accounts with a Region Visual Information/Training Support Center and the DA Administrative Publications System.

Evaluation Guidelines:

- Observe at least one lesson/course.
- Check lesson plans for inclusion of instructor/student- to-equipment ratio.
- Interview staff and students to identify training resource problems.
- Check for waivers if students cannot train to lesson conditions and standards because of lack of training resources.
- Compare requirements to requisition submissions.
- The organization identified training resource shortfalls and took appropriate corrective action.

Comment on:

- What, when, and why tng resources are not available as required.
- Instances in which students can't be trained to standards due to lack of resources.
- HHIs

References:
AR 5-13, paras 5-6 & 5-7; TR 350-6, paras 3-6 & 3-12; TR 350-8, paras 2-1 thru 2-4; TR 350-18, Chs 2 & 3; TR 350-70, para VI-6-9; ARPRINT Course Requirements; STRAC Tables; TR MEMO (TADSS)
POI, Lesson Plans

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 18 *(COT)* Met / Not Met

Institution uses ranges and training areas as prescribed.

Criteria:

- Training areas and ranges required by the lesson are actually used as required.
- Training areas and ranges required by the lesson meet the capability requirements.
- Range and training areas were scheduled to ensure their availability when needed.
- Access was provided to facilities required to implement the education/training when and for the period of time required to train to prescribed standard.
- Education/training organization has a waiver to use other than POI/TSP-prescribed training area/range.

Evaluation Guidelines:

- Observe at least one lesson requiring use of a range for each course in session when applicable.
- Mark as NOT MET if student cannot train to lesson/TSP conditions and standards because of lack of training areas/ranges.
- Interview students concerning range/training area use.
- Determine if education/training organization identified training areas/range shortfalls and took appropriate corrective action.

Comment if:

- There are instances when and why sufficient training areas/ranges are not available to conduct the training.
- Students cannot train to lesson plan conditions/standards because of lack of training areas/ranges (mark as a NO GO).
- Institution does not have a waiver.

References:

TR 350-70, paras VI-6-9 (Design) & VI-8-9 (Development)
POI, TSP, Lesson Plans

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 19 *(COT only)* Met / Not Met

Instructors/staff performs student academic counseling.

Criteria:

- Academic counseling occurs per references.
- The institution maintains student counseling records.
- Counseling records show all counseling sessions are current and complete.

Evaluation Guidelines:

- Randomly check student records for meeting counseling requirements.
- Review counseling forms for completeness and ensure they are developmental in nature (i.e. identify strengths, weaknesses, and ways to improve).

Comment if:

- Counselings are not developmental in nature.
- The organization does not meet the requirements for academic counseling.

References:

FM 22-100, Apx C (Developmental Counseling)
TR 350-6, para 2-2c (IMT only)
TR 350-18, paras 3-28 & 3-29a(2) (Student Evaluations)
TR 350-10, para 2-7g(3) (Student Evaluations)
Army Counseling Website (http://www.counseling.army.mil)
Student Records, CMP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

STUDENT RECORDS							UNIT:								DATE:
COURSE: _____ NAME	Orders (1)	Enrollment App. (2)	Pre –Execution Checklist (3) (a)	DA Form 705 (4) (b)	DA Form 5500/5501-R (if required) (5) (x)		Initial/ End of Course Counseling (6) (c)	Leadership Position Evaluations (7) (d)	Test Scores (8) (e)	DA Form 1059 (end of course) (9)	Student Performance Evaluation (10)	DA 3349 with MMRB (if applicable)	Dismissal/Appeal Packet (y)	Coded in ATRRS - Reason	TRADOC Reg 350-18 1. Para 3-22, 2. Para 3-28, b(1) 3. Para 3-28, b(3) 4. Para 3-28, b(9) 5. Para 3-24, a, b 6. Para 3-28, b(6) 7. Para 3-28, b(4) 8. Para 3-28, b(5) 9. Para 3-28, b(7), 10. Para 3-29 TRADOC Reg 351-10 a. Para 2-8, a(5), p 9 b. Para 2-8, a(3), p 9 c. Para 2-8, a(2), p 9 d. Para 2-8, a(1), p 9 e. Para 2-8, a(4), p 9 AR 600-9 x. Para 20, a, p 4 AR 351-1 y. Para 5-30 REMARKS

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Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 20 *(COT only)* Met / Not Met

Instructors/cadre serve as counselors and role models.

Criteria:

- SGLs/instructors/cadre act as counselors and role models.
- Counseling forms are completed for all formal academic counseling sessions.

Evaluation Guidelines:

- SGLs/instructors/cadre will be mentors, counselors, and role models during and after the normal academic day.
- Spot-check student counseling records from different instructors.
- Talk to both students and instructors.

Comment if:

- There are repeated instances of failure to record formal academic counseling.

References:

AR 670-1, para 1-9a
TR 350-6, paras 2-5, 3-1, & 3-14 (IMT only)
TR 350-10, para 2-14 (SGL, SSGL, and Instructor Standards)
DSSC CMP, Chs 1 & 5
Student Counseling Records
EOCCs

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 25 *(COT)* Met / Not Met

Institution administers criterion-referenced performance or performance-based tests in accordance with guidance.

Criteria:

- Organization uses only proponent-developed questions/tests.
- Tests are administered following proponent provided guidance.
- Students have been given SEP or have been informed of SEP requirements.
- SEP should be posted where students can view it.
- Institution administers criterion-referenced, performance, or performance-based tests.
- Institution conducts test reviews with students.
- Institution provides students opportunity for remediation prior to undergoing retests.
- Instructor provides students feedback at the end of each test.

Evaluation Guidelines:

- Verify that SEP is current for course being taught.

Comment on:

- Problems identified with test administration that could not be resolved.

References:

AR 351-1, para 6-15
TR 350-70, Ch VI-7 (Testing)
TR 350-18, para 3-11 (Administration)
TR 350-10, para 2-9f
TR Testing Memo
CMP, SEP, TSP, TAG

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 28 *(COT)* Met / Not Met

Institution conducts courses within the minimum and maximum class size limitations.

Criteria:

- Class enrollment conforms to class size limitations.
- Documentary evidence that the organization has taken steps to alleviate the problem when class size limitations are violated repeatedly.

Evaluation Guidelines:

- Compare CAD/POI/lesson plan class size limitations to student enrollment.
- Check if waivers were granted for each class that did not meet the size criteria requirement.

Comment if:

- There is no waiver granting authority to conduct training when class size violates the criteria and describes the detriment to training.

References:

TR 350-70, Ch II-8 (Training Development)
TR 350-10, para 5-11 (NCOA staffing and organizations)
CAD, POI, Lesson Plans

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 29 *(COT)* Met / Not Met

Institution conducts on-site risk assessments and takes action as appropriate.

Criteria:

- Onsite leader/instructor/facilitator conducts a risk assessment prior to the performance of any and all practical exercises and takes appropriate action to reduce risk.
- Risk assessments are addressed in the lesson material.

Evaluation Guidelines:

- Observe the conduct of at least one risk assessment.
- Review course training materials.
- Randomly interview instructors.

Comment on:

- Any case where risk assessments are not conducted when needed (e.g., conduct of FTX, conduct of a potentially hazardous PE).

References:

FM 100-4 (Risk Management)
TR 350-6, Ch 2 (IMT only)
TR 350-70, Ch I-2 (Safety & Environment)
TR 350-10, paras 2-17 (Risk Mgmt), 2-18 (Safety & Force Protection), & 2-19 (Environmental Protection and Stewardship)
TR 350-18, para 3-4
TSP, Lesson Plans

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 30 *(COT)* Met / Not Met

Institution conducts after action reviews (AAR)/sensing sessions as required by the course material.

Criteria:

- AARs/sensing sessions are conducted IAW lesson plans.

Evaluation Guidelines:

- Observe at least one AAR/sensing session for each course in session when applicable.
- Talk to instructors and students.

Comment on:

- Each occurrence where a required AAR/sensing session is not conducted.
- Instances of lesson plans calling for a FTX, CPX, STX or other similar exercise without calling for or allowing time for the AAR/sensing session.
- Instances when mandatory AARs/sensing sessions are not conducted.

References:

FM 25-101, Ch 5
FM 25-100, Page 5-1 & Page 5-2
TR 350-6, Ch 2 (IMT only)
TR 350-70, paras III-4-7 & IV-7-2
TSP, Lesson plans for FTX, CPX, STX

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 31 *(COT)* Met / Not Met

Institution provides remedial training.

Criteria:

- Remedial education/training is conducted.
- Remedial training is included on the training schedule during non-academic hours.

Evaluation Guidelines:

- Review education/training organization's SOP covering remedial-training procedures.
- Check training schedules for each course in session.
- Talk to instructors and students.

Comment on:

- Instances where remedial training was not provided when needed.

References:

TR 350-6, para 3-33 (IMT only)
TR 350-70, para II-2-7
TR 350-10, para 2-7a (Conduct of Training)
DSSC CMP, Ch 1
Institution's SOP, CMP, SEP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 32 *(COT)* Met / Not Met

Institution conducts physical fitness training.

Criteria:

- Physical fitness training is conducted IAW applicable references.

Evaluation Guidelines:

- The POI/CMP may dictate PT training hours.
- There may be specific requirements for how PT is conducted (e.g., NCOES will have student-led PT programs).
- Check PT for each course in session, as required.

Comment on:

- Instances where the PT is required and is not conducted.

References:

AR 350-41, paras 9-5a &9-8
AR 600-9
FM 21-20
TR 350-6, Ch 4 (IMT only)
TR 350-10, para 2-6 (Physical fitness)
Training Schedules, POI, CMP, Lesson Plan

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 36 *(COT only)* Met / Not Met

Institution maintains student attendance records.

Criteria:

- Attendance records are correctly/accurately maintained.
- Determine if attendance records are used to track minimum attendance standards.

Evaluation Guidelines:

- Spot-check records. (Check records from each type of course the education/training organization teaches, i.e., MOSQ, NCOES, WOES, OES).

Comment if:

- Maintenance of attendance records is a problem.
- Absences exceed course requirements.

References:

AR 25-400-2, Table 3-1
Mark FN 351a
TR 350-6, para 3-7 & Apx G (IMT only)
TR 350-10, paras 2-8 (Student Records) & 5-4j
TR 350-18, paras 3-12 (Attendance Register) & 3-28 (Student Academic Records)
Institution's SOP
DSSC CMP, Ch 2
Attendance Records, TR Form 270-R (IDT)

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 46 *(COT)* Met / Not Met

Students demonstrate working knowledge of the COE and OPFOR doctrine IAW POI/TSP/lesson plan requirements (ILD only).

Criteria:

- Students participate in a training exercise conducted in a COE tactical or operational environment against a FM 7-100 series opponent.
- Students plan, prepare, and execute operations successfully against an adaptive force in an COE environment.
- Students successfully complete projects or examinations in which COE and OPFOR doctrine are incorporated.

Evaluation Guidelines:

- Observe student training and performance and/or review project output.

Comment on:

- Instances where POI/lesson plans failed to include COE and OPFOR conditions/variables.
- Instances in which student fail to complete projects or examinations successfully due to a lack of understanding of COE and/or OPFOR doctrine.

References:

FM 7-100 (draft); FM 7-100-1 (draft); FM 7-100-2 (draft); FM 7-100-3 (draft)
COE White Paper, May 2001

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 47 *(COT)* Met / Not Met

Institution ensures all soldiers/officers meet mandatory graduation requirements (IMT only).

Criteria:

- Procedures are in place to verify mandatory graduation requirements have been met.
- Students not meeting these requirements are not graduated.

Evaluation Guidelines:

- Review records of most recent graduating classes.

Comment if:

- There are any instances of graduates not having met the mandatory requirements.

References:

AR 351-1, para 1-5
TR 350-6, para 1-5

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Tab E

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Training Support Job Aid

To assist evaluators with accreditations, the Accreditation Standards have been divided into three job aids in the TRADOC Accreditation Smart Book. These job aids are: Conduct of Training (COT), Training Support (TS), and Proponent Functions (PF). Each of these job aids has an Accreditation Standards List that has been modified to show only the Standards that apply to that area. In some cases, a Standard may be included in two areas. The “also” column in each of the three modified Accreditation Standards Lists will show if that Standard is included in another area. For example, Standard 1 is listed in COT and PF. Each Standard, within each job aid, has a two-page sheet to assist the evaluator in performing the accreditation. The front page has an administrative data section, guidance for that Standard, and a Met / Not Met rating. The back page is an Evaluator Worksheet to give the evaluators a place to write down their findings. Once the three separate Accreditation Standards Lists have been filled out, these ratings should be transferred to the Accreditation Standards List showing all 47 Standards. Once this is done, the Accreditation Team Leader will be able to determine the level of accreditation for that institution.

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ACCREDITATION STANDARDS LIST

for Initial Military Training, Reclassification Training, and Institutional Leader Development

ADMINISTRATIVE DATA

Organization being accredited	**Name:**	
	Location/address:	
Accrediting agency	**Name:**	
Accreditor:	**Name:**	**Phone: DSN:**
	e-mail address:	**Comm: (___)-___-____, ext**
	Address:	

REPORTING FOCUS

Type of Training (Check One)		**Initial Military Training**						
		Reclassification Training						
		Institutional Leader Development. (Indicate Education System)		**NCOES**		**WOES**		**OES**
Area Evaluated (Check One)		**Conduct of Training**						
		Training Support						
		Proponent Functions						

RECOMMENDATION

	Candidate		**Provisional**		**Fully Accredited**		**Other:**

REMARKS

(Attached additional comments should be keyed to item numbers.)

Training Support

(Includes Proponent Function [PF] criteria in Items 10 and 42.)

ITEM NO.	Standard	Met	Not Met	N/A N/O	Also
10	Institution follows test control procedures IAW TRADOC Testing Memorandum.				PF
11	Institution requisitioned training resources. i.e., equipment, TADSS, ammunition, pyrotechnics, training materials, consumable supplies and references) of the types and quantities to meet requirements.				
12	Staff and faculty training meets the needs of the institution.				
14	Institution evaluates and tracks instructor/cadre performance.				
21	The school/ institution is adequately staffed IAW approved TDA.				
22	Classrooms/shop areas/ learning facilities are adequate to promote learning and meet learning objectives.				
23	Education/Training organization has a viable transportation program				
24	Billets are adequate, clean, and maintained IAW references.				
26	Institution complies with ATRRS data entry requirements.				
27	Institution distributes materials required for course preparation to incoming students in a timely manner.				
33	Enrolled students meet course prerequisites.				
34	Institution processes students released from courses IAW references.				
37	Student records contain required documentation.				
38	Institution processes students who fail to maintain body composition standards IAW references.				
39	Institution prepares and distributes evaluation reports as appropriate.				
40	School/institution has written policies for Equal Employment Opportunity and Sexual Harassment				
41	Education/training organization provides for the health, welfare, and quality of life of soldiers				
45	Institution has corrected previously identified accreditation, evaluation, and QAO shortcomings.				

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 11 *(TS)* Met / Not Met

Institution requisitioned training resources, equipment, Training Aids, Devices, Simulations, and Simulators (TADSS), ammunition, pyrotechnics, training material, consumable supplies (e.g., spare parts, lubricants, student handouts), and references of the types and quantities to meet requirements.

Criteria:

- The required equipment listed in POI/TSP for courses in session was requested from appropriate agencies IAW applicable local procedures.
- The education/training organization forecasted and ordered all course-required training support materials and references for courses in session.
- The education/training organization maintains its accounts up-to-date (e.g., DA Administrative Publications System).

Evaluation Guidelines:

- Randomly interview staff and students; note shortages or overages.
- Review equipment/TADSS requisition documents.
- Review ammunition/pyrotechnic requisition documents.
- Detail the training impact of non-availability (to include dates, times, missing equipment, course, and class).
- If the education/training organization followed all the correct procedures, and failure to obtain equipment rests with an agency not within the control of the education/ training organization commandant battalion commander, include an appropriate comment in the executive summary.
- Check for waivers.

Comment:

- What is missing/inoperable, in what course, class, classroom, and on what date.
- Attach a copy of the request/tasking and reference the SOP/policy directive regulation which prescribes procedures for requesting required equipment.
- If training can not be conducted because of non-availability of consumable materials.
- HHIs and comment on Executive Summary.

References:

DA Pam 350-38 (STRAC); TR 350-18 Ch 3, TR 350-70 Ch VI-6
POI, TSP, Lesson Plan, Requisition Documents, Local SOP
Document Registers DA Form 2064, DA FM 581 Issue/Turn-in, TAMIS-R

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 12 (*TS only)* Met / Not Met

Staff and faculty training and professional development meet the needs of the institution.

Criteria:

- Institution provides evidence on needs assessment.
- Institution provides training to its staff and faculty IAW references.
- Institution provides training on the use of training/training development automated systems as required.
- Certification program includes instruction on COE and OPFOR doctrine.
- Required self-development training is available for improving staff and faculty skills and increasing faculty subject matter mastery.

Evaluation Guidelines:

- Review training for following populations: Instructors/cadre; Training Developers; Evaluators (certified); Training Development Managers; Training Managers; Installation personnel, as required.
- Compare numbers trained annually against target populations to determine whether or not training keeps pace with projected turnover.

Comment on:

- Any deficiencies in this area.
- HHIs.
- Instances where the institution offers **more** training to their staff and faculty beyond minimum requirements.

References:

TR 350-6, paras 1-6, 2-14, 3-6 & Apx F
TR 350-70, Ch II-1 & III-2
Institution's S&FD Program SOP
Proponent Instructor Certification Program

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 14 *(TS only)* Met / Not Met

Institution evaluates and tracks instructor/cadre performance, and takes action, as appropriate, to sustain, improve, and develop instructor/cadre competency.

Criteria:

- Institution develops developmental counseling that produces a plan of action instructors must follow to achieve individual and organizational goals.
- Organization has a process to provide feedback to the instructor's/cadre's performance appraisal systems.
- Organization has a process/program to improve and reward instructor/cadre performance.

Evaluation Guidelines:

- Evaluate instructor records from each type of course being evaluated (e.g., IET, Leader development).
- Ensure standards and requirements for instructor evaluation program are IAW regulations and CMP.
- Randomly interview instructors/cadre and evaluators.

Comment if:

- Substandard instructor/cadre performance was identified but not corrected.
- Instructor/cadre performance is not evaluated/tracked.

References:

FM 22-100, Apx C
TR 350-6, Chs 1 & 3 (IMT only)
TR 350-16, Ch 3
TR 350-70, CH II-1 (S&F Certification) & III-4 (Eval Instructor Performance)
TR 350-18, para 2-19(f)(g) (Instructor Evaluations)
TR 350-10, para 2-14a(4)(Qtrly Written Evals)
Proponent Instructor Certification Program
Instructor Records

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

INSTRUCTOR RECORDS (NCOES)								Unit:										DATE:
COURSE: _____ **NAME**	**Cert /Memo Requesting Cert (1)**	**DA Form 2-1/PQR/ERB/NCOER (a) (1)**	**DA Form 705 (a) (1)**	**DA Form 5500-R/5501-R (If Applicable) (1)**	**Copy of any profiles (1)**	**TAITC Certificate**	**Course Taught Certificate (1)**	**SGITC Certificate**	**VTTITC Certificate (if required)**	**Orders awarding SQI "H" (1)**	**Initial Evaluation**	**1st Quarter Evaluation**	**2nd Quarter Evaluation**	**3rd Quarter Evaluation**	**4th Quarter Evaluation**	TRADOC 350-18 1. Para 4-6, a-i, TRADOC 351-10 a. Para 2-14, a(1)-(5)(d), p 10-11 AR 350-41 x. Para 12-2, f(2), p 22 **Instructor Certification Program for NCOPD** y. p 3-3, 3-4, 3-6 REMARKS

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Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 21 *(TS only)* Met / Not Met

The school/institution is adequately staffed IAW approved TDA.

Criteria:

- The commandants and commanders have staffed their schools with sufficient instructor, admin, ops, and supply personnel to accomplish the training mission.
- The School's authorizations on TDA meet current mission requirements.
- The School is in compliance with its own TDA.

Evaluation Guidelines:

- Check TDA and authorizations manning documents.
- Compare the TDA to the Unit Manning Roster.
- Review last Monthly Status Report.
- Check that ranks of training battalion commanders are IAW the approved TDA.
- DA Pam 611-21 contains enlisted standard grade requirements for the structure of a TDA.

Comment on:

- Any and all deficiencies in this area.
- HHIs.

References:

DA Pam 611-21, Ch 11
TR 350-10, para 5-11 (NCOA Staffing and Organization)
TR 350-18, Ch 3 (Administration)
Changes submitted to TDA
POI

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 22 *(TS)* Met / Not Met

Classrooms/shop areas/ learning facilities are adequate to promote learning and meet learning objectives.

Criteria:

- Classrooms/shop areas/learning facilities (e.g. MOUT site, swimming pool) size, lighting, climate control, and furnishings are adequate.
- Facilities are maintained in a serviceable condition.
- Study facilities are available to students after duty hours.
- Education/training organization has sufficient multi-media, word processing, and internet capabilities required for coursework available for student use after duty hours.
- The education/training organization identified and submitted MCA project requirements and made an appropriate update to their ITPs.

Evaluation Guidelines:

- At a minimum, observe size, lighting, climate control, furnishings, and condition.
- Verify the status of facilities as described in most recent Installation Status Report (ISR).
- Check copies of requests for facilities and facility improvements.

Comment on:

- Areas that do not meet ISR amber rating and efforts have not been made by the education/training organization made to improve the condition.
- Any and all efforts made to correct problems/situations.
- HHIs.

References:

TR 350-6, Apx K (IMT only)
TR 350-10, para 2-7d (Conduct of Tng/Tng Environment)
TR 350-18, para 3-5c(1), 3-20f, & 3-20g
AR 210-50, para 4-4 & Table 4-2
Copies of requests for improvements
CMP, POI, ISR

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 23 (*TS only*) Met / Not Met

Education/training organization has a viable transportation program.

Criteria:

- Students can safely reach their places of duty on time with minimum time enroute.
- Students are transported to training sites for classes with minimum use of academic time.

Evaluation Guidelines:

- Randomly interview students and instructors to identify problems.
- Review the institution's SOP.
- Review EOCCs to identify possible problems.
- Review the training schedule.

Comment on:

- Any identified deficiencies in this area.

References:

Institution's SOP
Policy documentation

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 24 *(TS only*) Met / Not Met

Student billets that are adequate, clean, and maintained IAW Army policies.

Criteria:

- Randomly interview students and instructors to identify problems.
- Billets provide adequate space and the furnishings are to standard IAW references.
- Billets are clean and maintained to Army standards.
- Students are billeted on post whenever practical.
- **NCOES Only:** Installation commanders (commandants) made every effort to billet students on post in NCOA training Battalions and Active Component NCO Academies to create the desired NCOA live-in environment.
- **IMT Only:** Billets conform to separate and secure guidelines.

Evaluation Guidelines:

- **NCOES Only:** Determine if priority billet assignments goes to PLDC students, then BNCOC students, then ANCOC students.
- Statements of non-availability were issued to student when appropriate.

Comment on:

- Billets that are not to standard, review documented efforts to bring them up to standard. If problem is beyond the control to the education/ training organization indicate that it is a higher HQ issue.
- Identify any factors in billeting that distract from learning.

References:

AR 210-50, para 4-4, Table 4-2 & Table 4-3
TR 350-6, para 2-9 (IMT only)
TR 350-10, para 2-5 (Billeting)
DSSC: CMP, Ch 4
TB Med 530
Installation Status Report (ISR)
Institution's SOP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 26 *(TS only)* Met / Not Met

Institution complies with ATRRS data entry requirements.

Criteria:

- ATRRS includes all courses and DL phases/modules for which education/training organization is proponent.
- Organization posts current student prerequisite and orientation information in ATRRS.
- Training institution enters student status codes IAW DAMO-TR guidelines.
- Proponent schools list course prerequisites in ATRRS.

Evaluation Guidelines:

- Compare course documentation to ATRRS entries.
- Verify that current prerequisite and orientation information is in ATRRS, if appropriate.

Comment if:

- Maintenance of the ATRRS data is a systemic problem.

References:

AR 350-10, para 1-4q, 3-1a, 3-1b, & 3-1c
TR 350-6, Apx H-8 & J-2 (IMT only)
TR 350-18, paras 3-17, 3-18 (ATRRS), 3-23 (Student Orientation),
3-28 (Student Academic Records) TR 350-10, para 2-4 (Student Orientation)
MEMO, HQDA, ODCSOPS, DAMO-TR, 1 Feb 93, Ind Tng Mgmt – RCs in ATRRS

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 27 *(TS)* Met / Not Met

Institution distributes materials required for course preparation to incoming students in a timely manner.

Criteria:

- Materials required to prepare for the course were provided to students in sufficient time to accomplish the required advance preparation.
- Only materials required by the course documentation are provided to the student.
- Distribution agency only: Correct materials are provided in a timely manner.

Evaluation Guidelines:

- Compare material provided with course documentation.
- Randomly interview students currently enrolled in the course.
- Review end-of-course critiques.
- Review memorandums identifying problems and corrective actions.
- Identify the organization responsible for distribution of the materials prior to students reporting for training.

Comment on:

- Instances of students not receiving materials.
- HHIs.

References:

TR 350-10, para 2-4 (Student Orientation)
TR 350-18, para 3-5a (Training Prerequisites)
EOCCs
CMP, TSP, POI
List of courses requiring distribution of materials prior to students reporting.
List of materials students are to receive.

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 33 *(TS only)* Met / Not Met

Enrolled students meet course prerequisites.

Criteria:

- All reporting students meet course academic and non-academic prerequisites.
- Education/training organization collects pre-execution checklist and verifies all entries are completed and any required attachments are present (as applicable).
- Education/training organization does not enroll students not meeting course prerequisites.
- Appropriate action was taken for individuals who did not meet the prerequisites.

Evaluation Guidelines:

- Enrollment of a student who does not meet prerequisites will constitute a NO GO unless a written waiver has been granted.
- Check the in-processing roster to identify students with profiles or who do not meet prerequisites.
- Check the record of every student on-site with a profile; every record must meet the standards. Records of students with P3 or P4 profiles must contain Medical Review Board (MRB) results.
- Review waivers and pre-execution checklists.

Comment on:

- Every student who does not meet course prerequisites, make a not of the student's unit of assignment, course, and class. Include this information in the summary report as HHI.
- Enrollment of students who do not meet prerequisites is a systemic problem.

References:

AR 350-41, para 9-2f; AR 351-1, paras 1-13, 5-16, 5-18, 5-20, & 5-33
AR 614-200, para 8-15; DA PAM 611-21
TR 350-16, Ch 2; TR 350-18, para 3-25 (Enrollment and Attachment)
TR 350-10, Chs 2 (Ldr Tng) & 5 (NCOES)
In-processing roster, Student Records, Pre-execution checklists, waivers, RS screen
CMP, POI

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 34 *(TS only)* Met / Not Met

Institution processes students released from training courses IAW references.

Criteria:

- Correct ATRRS status codes are assigned to released students.
- Students who are released from a course receive the proper notification.
- Institution has and follows policy/standing operating procedures.
- Students have been accorded appropriate appeal process.

Evaluation Guidelines:

- Spot-check dismissal records: verify correct status codes are assigned; verify that proper notification was given to dismissed students.

Comment if:

- Discrepancies are found in student dismissal files.

References:

AR 351-1, paras 1-10 & 5-30
AR 614-200, Ch 8
AR 623-1, Ch 1
TR 350-6, Ch 3 (IMT only)
TR 350-16, Ch 2
TR 350-18, paras 3-32 (Notice of Denied Enrollment) & para 3-33 (Student Dismissal)
TR 350-10, para 2-11 (Student Dismissal)
Student Dismissal Files
RS Screen for released students

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

STUDENT DISMISSAL JOB AID

SCHOOL / BATTALION: _____
DATE: _____

	YES	NO	REMARKS
1. Student Dismissal: a. Determine reason for release b. Student counseled (DA Form 4856). (CMDT reviews folder/counsels soldier) c. Required Memorandums to be produced: (1) Notification of Elimination Memorandum to Student (2) Student has 2 days to submit an appeal for elimination. (3) Student endorsement of counseling and notice of Elimination was received. d. If student appeals, forwarded appeal to CMDT and go to item "e". If student does not appeal go to item "i". e. CMDT will forward appeal to JAG for review. f. CMDT will then forward appeal to disinterested SGM (E9) appointed by GCM Convening Authority. g. If Student Appeals and Wins: (3) Student remains in course and continues training. h. If Student Appeals and Loses: (1) See "i" below. i. Prepare memorandum to 1st General Officer in the student's Chain of Command, Commander, and Order Issuing Authority if applicable. j. Prepare DA Form 1059 and referred AER memorandum. k. Have student acknowledge receipt of referred AER memorandum.			*AR 351-1, Para 5-30* *Para 5-30c(3)(a)* *Para 5-30c(3)(a)* *Para 5-30c(3)(b)* *5-30c(3)(c)* *5-30c(3)(c)* *TRADOC Reg 350-18, Para 3-32* *AR 623-1, Para 1-13* *AR 623-1, Para 1-13*

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Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 35 *(TS)* Met / Not Met

Institution has a policy for retraining/recycling students.

Criteria:

- Institution has a SOP/written policy for retraining.
- Students that have been removed from a class are re-enrolled into a following class when feasible.

Evaluation Guidelines:

- Check student records to identify students who were recycled, are in danger of failure, or were removed from the course.
- Policy should address time, student physical limitations, student performance record, motivation, et al.)

Comment if:

- Organization has no standard procedures established for determining which students should be retrained.

References:

TR 350-6, Chs 2, 3(IMT only) & Apx J
TR 350-18, para 3-2
Local SOP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 37 *(TS only)* Met / Not Met

Student records contain required documentation.

Criteria:

- Entries in records of students currently enrolled are up to date and accurate.

Evaluation Guidelines:

- Spot-check records. (Check records from each type of course the education/training organization teaches, i.e., MOSQ, NCOES, WOES, OES).

Comment if:

- Student record maintenance is identified as a problem.

References:

TR 350-6, Ch 3 & Apx G (IMT only)
TR 350-10, para 2-8 (Student Records)
TR 350-18, paras 3-12, 3-13, & 3-28
Access to student records.

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

STUDENT RECORDS							UNIT:								DATE:
COURSE: _____ NAME	Orders (1)	Enrollment App. (2)	Pre –Execution Checklist (3) (a)	DA Form 705 (4) (b)	DA Form 5500/5501-R (if required) (5) (x)	Initial/ End of Course Counseling (6) (c)	Leadership Position Evaluations (7) (d)	Test Scores (8) (e)	DA Form 1059 (end of course) (9)	Student Performance Evaluation (10)	DA 3349 with MMRB (if applicable)	Dismissal/Appeal Packet (y)	Coded in ATRRS - Reason		REMARKS

TRADOC Reg 350-18

1. Para 3-22, 2. Para 3-28, b(1)
3. Para 3-28, b(3) 4. Para 3-28, b(9)
5. Para 3-24, a, b 6. Para 3-28, b(6)
7. Para 3-28, b(4) 8. Para 3-28, b(5)
9. Para 3-28, b(7), 10. Para 3-29

TRADOC Reg 351-10

a. Para 2-8, a(5), p 9
b. Para 2-8, a(3), p 9
c. Para 2-8, a(2), p 9
d. Para 2-8, a(1), p 9
e. Para 2-8, a(4), p 9

AR 600-9

x. Para 20, a, p 4

AR 351-1

y. Para 5-30

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Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 38 *(TS only)* Met / Not Met

Institution processes students who fail to maintain body composition standards IAW references.

Criteria:

- Organization has procedures in place to verify that students maintain body composition standards.
- Organization complies with their procedures to manage students who fail to maintain body composition standards.

Evaluation Guidelines:

- Review student records to identify how Education/training organization has managed students who fail to maintain body composition standards.
- Discuss procedures with Education/training organization staff.
- Check records of all soldiers identified as overweight. Students identified as overweight after enrollment must be processed IAW Army Regulation 600-9.
- Ensure height and weight data are annotated in AERs/ITRs.

Comment if:

- An organization does not process students IAW references.

References:

AR 350-41, para 9-8
AR 351-1, paras 1-13 & 5-32
AR 600-9, Ch 1 (Interim change 1) & para 3-24
TR 350-6, Ch 3
TR 350-10, para 2-6
TR 350-18, paras 3-28 & 3-32
Institution's SOP, AERs/ITRs

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 39 *(TS only)* Met / Not Met

Institution prepares and distributes training evaluation reports as appropriate.

Criteria:

- A DA Form 1059 (AER)/DA Form 5286-R (ITR) is prepared on all students as appropriate IAW references.
- Adverse AERs are referred to the student for acknowledgment and comment.

Evaluation Guidelines:

- Check to see if the education/training organization has a procedure to ensure proper distribution of AERs/ITRs.
- Spot-check AERs/ITRs and student records. Evaluate records from each type of course the education/training organization teaches (e.g., MOSQ, NCOES, WOES, OES).

Comment if:

- Inadequate AER/ITR maintenance is a problem.

References:

AR 351-1, paras 5-27 & 5-30
AR 623-1 Chs 1 & 2
TR 350-6, Apx G (IMT only)
TR 350-10, para 2-7g(4) (Student Evaluations)
TR 350-18, paras 3-29 (Student Evaluations) & 3-30 (Academic Eval Report)
DSCC POI, Ch 1
POI, CMP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 40 *(TS only)* Met / Not Met

School/ institution has written policies for Equal Employment Opportunity and Sexual Harassment.

Criteria:

- The institution has written policies for Equal Employment Opportunity and Sexual Harassment.
- The institution makes available to students and staff standing operating procedures (SOP) or policy documents (must be posted on bulleting board).
- The institution has trained equal opportunity personnel.

Evaluation Guidelines:

- Check for documentary evidence of Equal Employment Opportunity and Sexual Harassment policies.
- Verify that relevant SOP or policy memoranda are made available to students and staff. Check for posting at training sites where the policies must be enforced.
- Check for documentary evidence that school has trained EEO personnel.

Comment if:

- There is an absence of written EEO and/or POSH policies.

References:

AR 600-20, paras 6-2 & 7-2
TR 350-6, paras 2-6 & 2-12 (IMT only)
TR 350-18, para 3-2 (Institution SOP)
Institution's SOP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

EQUAL OPPORTUNITY JOB AID

SCHOOL / BATTALION: _____
DATE: _____

	YES	NO	REMARKS
EO. a. Memo appointing EOR signed by CMDT. b. Record of training for EOR (80 hrs by EOA). c. Quarterly EO Training for staff and faculty. d. EOR contact information is posted on bulletin boards.			*AR 600-20, Chapter 6* *Para 6-2i* *Para 6-14(2)*

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Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 41 (*TS only)* Met / Not Met

Education/training organization provides for the health, welfare, and quality of life of students.

Criteria:

- Support activities (in/out-processing, mailroom, operations, tasking, scheduling, equipment maintenance, dining facility, finance, supply, etc…) are available to meet the needs of the training org, adequately support the tng mission, and provide for the health and welfare of soldiers.
- The institution allows for staff/student non-academic counseling.
- The institution provides staff/student advisory services.
- Dining facilities are available to ensure learners and staff have sufficient time to acquire proper nourishment
- Laundry facilities/services are readily available and are of good quality and are timely.

Evaluation Guidelines:

- Randomly interview students and instructors to identify problems.
- Review end-of-course critiques

Comment if:

- There are any systemic problems.

References:

AR 210-50, paras 3-40 & 3-43
TR 350-10, paras 2-4 (Student Orientation) & 2-5 (Billeting)

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 45 *(TS)* Met / Not Met

Institution has corrected previously identified accreditation, evaluation, and QAO shortcomings.

Criteria:

- Organization corrected previously identified shortcomings or raised issue to higher HQ when they could not resolve the issue.

Evaluation Guidelines:

- Review self-assessment and previous accreditation/Quality Assurance Office (QAO) findings and results.
- Check training in which previous shortcomings were recorded.
- Verify the organization has written justification of all failures to correct shortcomings identified in a previous accreditation evaluation.

Comment on:

- Previous shortcomings found that are not corrected and not justified in writing prior to the start of the evaluation. (This is a cause for a NOT MET)
- Instances where identified deficiencies were not corrected and the reason for the failure to correct deficiencies. (May be HHI.)

References:

TR 350-70, Part III (Evaluations & QA Program)
TR 350-10, para 2-15 (Accreditation)
Previous Accreditation Reports

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Tab F

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Proponent Functions Job Aid

To assist evaluators with accreditations, the Accreditation Standards have been divided into three job aids in the TRADOC Accreditation Smart Book. These job aids are: Conduct of Training (COT), Training Support (TS), and Proponent Functions (PF). Each of these job aids has an Accreditation Standards List that has been modified to show only the Standards that apply to that area. In some cases, a Standard may be included in two areas. The “also” column in each of the three modified Accreditation Standards Lists will show if that Standard is included in another area. For example, Standard 1 is listed in COT and PF. Each Standard, within each job aid, has a two-page sheet to assist the evaluator in performing the accreditation. The front page has an administrative data section, guidance for that Standard, and a Met / Not Met rating. The back page is an Evaluator Worksheet to give the evaluators a place to write down their findings. Once the three separate Accreditation Standards Lists have been filled out, these ratings should be transferred to the Accreditation Standards List showing all 47 Standards. Once this is done, the Accreditation Team Leader will be able to determine the level of accreditation for that institution.

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ACCREDITATION STANDARDS LIST

for Initial Military Training, Reclassification Training, and Institutional Leader Development

ADMINISTRATIVE DATA

Organization being accredited	**Name:**	
	Location/address:	
Accrediting agency	**Name:**	
Accreditor:	**Name:**	**Phone: DSN:**
	e-mail address:	**Comm: (___)-___-____, ext**
	Address:	

REPORTING FOCUS

Type of Training (Check One)		**Initial Military Training**						
		Reclassification Training						
		Institutional Leader Development. (Indicate Education System)		**NCOES**		**WOES**		**OES**
Area Evaluated (Check One)		**Conduct of Training**						
		Training Support						
		Proponent Functions						

RECOMMENDATION

	Candidate		**Provisional**		**Fully Accredited**		**Other:**

REMARKS

(Attached additional comments should be keyed to item numbers.)

Proponent Functions (To be evaluated at the TD Proponent location, but may be flagged during evaluation of Conduct of Training and Training Support)					
ITEM NO.	**Standard**	**Met**	**Not Met**	**N/A N/O**	**Also**
1	Students can perform to the standards prescribed in the lessons.				COT
2	Instructors train students to the prescribed standards.				COT
4	Institution conducts training in compliance with safety hazard and environmental considerations identified in lesson plans, as well as installation training areas.				COT
5	Institution conducts training which is effective and efficient				
7	Tasks are current and approved.				
9	Tests are valid and reliable.				
10	Institution follows test control procedures IAW TRADOC Testing Memorandum.				TS
13	Curriculum is COE compliant				
17	Instructors use training resources, to include ammunition, pyrotechnics, training equipment, TADSS, training materials, consumables, and references as prescribed.				COT
18	Institution uses ranges and training areas as prescribed.				COT
25	Institution administers criterion-referenced performance or performance-based tests in accordance with guidance.				COT
42	Institution has quality assurance and quality control functions in place to identify education/training program deficiencies and coordinate corrections.				
43	Institution conducts internal and external evaluations.				
44	Institution does not use copyright and intellectual materials in education/training unless appropriate written releases have been obtained and are on file				

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 1 *(PF)* Met / Not Met

Students can perform to the standard prescribed in the lessons.

Criteria:

- Performance tests and practical exercises are included in or provided to support lessons.
- LOs match/support the tasks to be taught in the lesson.
- Tests measure lesson objective performance.

Evaluation Guidelines:

- Compare lesson LOs to tasks to be taught by the lesson to determine if the specified lesson actually teaches task performance.
- Compare tests to lesson LOs to determine if the specified test actually measures student performance of the established LOs to the prescribed standards.
- Compare lesson LOs to the lesson materials to determine if the material teaches the LOs.

Comment if:

- Tests taken by students do not measure performance of the LOs.

References:

TR 350-6, CH 1,2,4,5 & Apx B&C (IMT only)
TR 350-70, CH VI-6 (Design), VI-7 (Testing), and VI-8 (Development)
FM 25-100, CH 1 (Training Overview)
CTL, CMP, POI, TSPs

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 2 *(PF)* Met / Not Met

Instructors train students to the prescribed standards.

Criteria:

- LOs reflect the performance required of the tasks being trained.
- LOs identify standards that measure performance of the LO action statement.
- The proponent provided a CMP to the using organization which reflects the POI/TSPs.

Evaluation Guidelines:

- Compare the lesson LOs to the tasks being trained to the required performance in the lesson.
- Instructors may share operational assignment experience to facilitate learning, but must teach everything that is included in the approved lesson.
- Crosswalk the CTL/CMP/POI/TSPs to ensure they match. (If not, ensure the organization has a waiver from the proponent for changes to the lesson plans.

Comment if:

- The lesson material does not teach the LO as prescribed in the lesson.
- The CTL/CMP/POI/TSPs do not match.

References:

TR 350-6, Chs 2 & 3 (IMT only)
TR 350-70, CH VI-6 (Design) and CH VI-8 (Development)
TR 350-10, para 2-7g (Student Evaluations)

CMP, POI, Lesson Plan
EOCCs

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 5 *(PF only)* Met / Not Met

The institution conducts training that is effective and efficient.

Criteria:

- Learning objectives (TLO/ELOs) reflect task performance and supporting skills/knowledge to the highest possible level of fidelity in the field.
- Learning objectives are included in all IMI (CBI) lessons.
- Course is structured based on learning hierarchy derived from tasks and supporting skills and knowledge.
- Method of instruction selected is an effective way of presenting the material.
- The technique of delivery selected is an effective way of presenting the material.
- **The course is structured based on learning hierarchy derived from tasks and supporting skills and knowledge.**
- Audio-visual materials and special effects contribute to learning.
- Education/training is created (Produced) following the SAT processes IAW required references.

Evaluation Guidelines:

- Compare MOIs and techniques of delivery to guidance in TR 350-70, Appendix H.
- Verify that audio-visuals and special effects used in training comply with guidance provided in Chapter 4, TRADOC Pam 350-70-2.

Comment if:

- Better use of MOI, technique of delivery, and/or audio-visuals would improve the presentation.

References:

TR 350-70, Apx H (Methods/Techniques for Delivering Instruction)
TR PAM 350-70-2, CH 4
CMP, POI, TSP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 7 *(PF only)* Met / Not Met

Tasks are current and approved.

Criteria:

- TD has approved task list.
- TD has current approved critical task analysis data (audit trail).
- Courses are designed using the approved task data (audit trail).
- ILD ONLY: Course design provides for meeting competencies.

Evaluation Guidelines:

- Review task approval memo.
- Compare tasks listed in POI/TSPs to approved task list.
- Review MEMOs which approve deviation from CTL.
- Compare tasks to current reference material, e.g. doctrine.

Comment if:

- Courses are designed which do not use the current approved tasks.
- CTL is not approved by commandant.
- Tasks and task analysis do not reflect current doctrine.

References:

TR 350-70, Chs VI-1 & VI-2
TR 350-10, para 1-4
Memos approving deviation from CTL and approving CTL,
CTLs, POI, TSPs

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 9 *(PF only)* Met / Not Met

Tests are valid and reliable.

Criteria:

- Test provided are valid.
- Tests analysis was conducted (audit trail) and validity/reliability results were/are being applied to the tests.
- Test items are derived from and measure LO performance.
- Skills and performance are tested at the application level or above.
- Test items match conditions, actions, and standards of objectives and measure actual on-the-job performance to the maximum extent possible.
- Tests certify that student is competent in the job and can perform task to established standard.
- Passing score for tests is consistent with job performance requirements.

Evaluation Guidelines:

- Review test/test item analysis data.
- Determine if the tests have been validated (audit trail).
- Determine if test/test item analysis results are provided to the individuals responsible for constructing/revising the test(s).
- Review validation reports to verify that validation guidelines were followed and that tests/courseware were validated and errors were corrected.

Comment on:

- Any finding of using invalid tests.
- Every instance where a student was failed/dropped from education/training by using a test that was not validated or was known to be invalid.

References:

TR 350-6, para 3-31 (IMT only)
TR 350-70, Ch VI-7 (Testing)
Tests, Test Item Analysis, Corrective Actions

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 10 *(PF)* Met / Not Met

The organization follows test control procedures.

Criteria:

- Test administration procedures are included in the CMP, lesson plans, and/or with tests.

Evaluation Guidelines:

- Determine if the CMP/lesson plans and/or tests contain test control procedures.
- Check to see that test developers handle and store tests IAW regulatory requirements and proponent provided procedures (i.e.Institution's SOP).
- Check this item at education/training sites where tests are handled, stored, administered, or scored.

Comment if:

- The training proponent does not have a set procedure for handling/storing tests during development (i.e. SOP).

References:

TR 350-70, Ch VI-7 (Testing), Apx E (CMP)
TR 350-10, para 2-9f (Test Security)
AR 611-5
DSSC CMP, CH 1
TRADOC Testing Memorandum, 1 Oct 01
CMP, POI

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 13 *(PF only)* Met / Not Met

The curriculum is COE compliant.

Criteria:

- Proponent has current Doctrine references available.
- Collective and individual education/training materials (analysis, courseware, MTPs, etc.) reflect incorporation of current doctrine, e.g. COE.
- Common and proponent produced scenarios reflect current doctrine.
- COE variables are integrated into training exercises and classroom work.
- OPFOR used in all training scenarios and for other classroom work is compliant with order of battle and doctrine in referenced FMs.

NOTE: COE variables; complex terrain, social and cultural factors, regional and international relationships, PVOs/NGOs, information, time and economics, are used to illustrate the complex battlefield. These variables are explained at the level appropriate for the training audience.

Evaluation Guidelines:

- Review POI/lesson plans for inclusion of COE variables.

Comment if:

- There are instances in which COE variables are not integrated into training exercises or classroom work.

References:

FM 7-100 (draft); FM 7-100-1 (draft); FM 7-100-2 (draft); FM 7-100-3 (draft)
COE White Paper, May 2001
FM 3-0

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 16 *(PF)* Met / Not Met

Instructors have and use the required course materials.

Criteria:

- All education/training materials have been validated IAW regulations.

Evaluation Guidelines:

- Compare CMP, lesson plans, POI, tests, Student Evaluation Plan, and other course material for currency and alignment. (Do they match?).
- Review the audit trail which contains validation results.

Comment on:

- Instances where lesson plans do not match CTL/POI/CMP/tests.
- Instances where an audit trail for validated training material doesn't exist.

References:

TR 350-6, paras 3-2 & 3-6 (IMT only)
TR 350-70, Chs VI-6 (Design), VI-7 (Testing) & VI-8 (Development)
TR 350-18, para 4-5
TR 350-10, para 2-7
CMP, POI, TSP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 17 *(PF)* Met / Not Met

Instructors use training resources, to include ammunition, pyrotechnics, equipment, TADSS, training materials, consumables (e.g., spare parts, lubricants, student handouts), and references, as prescribed.

Criteria:

- Training developers specify the training resources required to conduct training in the POI/TSP/lesson plans.

Evaluation Guidelines:

- Check the POI/TSP/lesson plan to ensure it specifies the required specific training resources required to conduct training.

Comment if:

- POI/lesson plans did not include the training resources required to conduct training.

References:

AR 5-13, paras 5-6 & 5-7; TR 350-6, paras 3-6 & 3-12; TR 350-8, paras 2-1 thru 2-4; TR 350-18, Chs 2 & 3; TR 350-70, para VI-6-9; ARPRINT Course Requirements; STRAC Tables; TR MEMO (TADSS)
POI, Lesson Plans

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 18 *(PF)* Met / Not Met

Instructors use ranges and training areas as prescribed.

Criteria:

- POI/TSP/lesson plans specify the required ranges and training areas.

Evaluation Guidelines:

- Check the POI/TSP/lesson plan to ensure it specifies the required ranges and training areas.

Comment if:

- POI/TSP/lesson plans did not include the required ranges and training areas.

References:

TR 350-70, paras VI-6-9 (Design) & VI-8-9 (Development)
POI, TSP, Lesson Plans

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 25 *(PF)* Met / Not Met

Institution administers criterion-referenced performance or performance-based tests in accordance with guidance.

Criteria:

- SEP/TAGs were provided to the using organizations.
- TD proponent furnished to training providers test administration guide for each test.
- Pretests are incorporated in programs that administer IMI (CBI).

Evaluation Guidelines:

- Verify that SEP is part the CMP which was provided to the using organizations.
- Verify that a TAG was provided to instructor for performance tests.

Comment if:

- A SEP was not provided as part of the CMP.
- A TAG was not provided for a performance examination.

References:

AR 351-1, para 6-15
TR 350-70, Ch VI-7 (Testing)
TR 350-18, para 3-11 (Administration)
TR 350-10, para 2-9f
TR Testing Memo
CMP, SEP, TSP, TAG

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 42 *(PF Only)* Met / Not Met

Institution has quality assurance and quality control functions in place to identify education/training program deficiencies and coordinate corrections.

Criteria:

- Quality Assurance (QA)/Quality Control (QC) SOP/instructions implemented.
- Evaluators actively participate in development of education/training programs and products.

Evaluation Guidelines:

- Review organization's SOP, Missions and Functions documents, Commander's Feedback, and/or ISE.
- Check Project management plans to determine if QA personnel are identified as part of the development team.

Comment on:

- Record failure of organization to have QA/WC SOP/instructions implemented.
- Record failure of organization to identify deficiencies and take corrective action.
- HHIs.

References:

TR 350-6, Chs 2 & 3 (IMT only)
TR 350-70, Part III (Evaluation & QA)
TR Pam 350-70-4, Chs 8 & 9
Memo, ATTG-CD, 12 Jun 00, TR Eval & QA Program
Institution's SOP

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 43 *(PF Only)* Met / Not Met

Conducts internal and external evaluations.

Criteria:

- Has a current Master Evaluation Plan (MEP).
- Conducts internal evaluations.
- Conducts external evaluations to determine if education/training me unit requirements.
- Evaluations determined efficiency/effectiveness of training.
- Evaluations identified more economical means for presenting the education/training.
- Proponent has accredited affiliated RC training battalions IAW required references.

Evaluation Guidelines:

- Review the MEP to determine what evaluations were scheduled.
- Review the results of evaluations.
- Review documented justification as to the non-conduct of internal or external evaluations.

Comment on:

- Where, when, and why evaluations were not conducted as planned, were not planned, or no evaluation program exists.

References:

TR 350-10, paras 1-4 & 2-7
TR 350-70, Part III (Evaluation & QA Program)
TR Pam 350-70-4, Chs 8 & 9

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Name of Evaluator: _____ Date: _____

Program/Course: _____

Instructor/POC: _____

Standard 44 *(PF Only)* Met / Not Met

Institution does not use copyright and intellectual materials in education/ training unless appropriate written releases have been obtained and are on file.

Criteria:

- Copyright and intellectual materials are not used in education/ training unless appropriate written releases have been obtained and are on file.
- Instructors do not add copyright and intellectual material to their presentations.

Evaluation Guidelines:

- Randomly interview staff to identify potential copyright infringements.
- Review course document and identify material that could be copyright material. (Review should include text, graphics, and audio.)

Comment if:

- There are cases of government use of copyright material without written authority to do so.

References:

Federal Law
TR 350-70, para I-1-7 (Copyright Material)
DoD Instructions

EVALUATOR WORKSHEET

Mandatory Comments (including HHIs): _____

Observations: _____

Recommended Improvements: _____

Tab G

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Cover Letter for Self-Assessment Report

{Information in brackets provides guidance for completing cover letter.}

Office Symbol

MEMORANDUM FOR
{The appropriate team leader, i.e., Director of CAC QAO; AAC QAO; or Proponent School QAO.}

SUBJECT: Self Assessment Report for {training institution}

1. References

a. Memorandum, HQ TRADOC, Deputy Commanding General/Chief of Staff, 11 Apr 02, subject: TRADOC Accreditation of Initial Military Training, Institutional Leader Development and Combat Training Center Programs

b. {Appropriate Accreditation Team's Letter of Instruction.}

2. The {name of organization/office that conducted self-assessment} completed a self-assessment on {date}.

3. The following courses were evaluated during the self-assessment:

a. {Name of course}
b. {Name of course}
c. {Name of course}
d. {Name of course}
e. {Name of course}

4. Enclosed is (are) the self-assessment report(s) highlighting accomplishments, strengths, limitations, deficiencies, corrective actions, new initiatives, training program-related investments, and higher headquarter issues for the conduct of training, training support, and proponent functions (delete the latter if not applicable) based on the TRADOC Accreditation Standards Guide.

5. Attachments to self-assessment report include:

a. Tab A. Commander's Training/Education Guidance, Directives, and Policies.

b. Tab B. An annotated copy of the TRADOC Accreditation Standards List showing a self-rating for each standard and any supporting documentation, to

include explanation of standards not met.

c. Tab C. Organizational charts to include names and titles of Directors and Division Managers, phone numbers, and e-mail addresses.

d. Tab D. A copy of supporting TDA/TOE.

e. Tab E. Instructions to the Accreditation Team on how to electronically access required documentation for courses that will be observed during the accreditation visit.
Note: If electronic copies are not available, attach paper copies.

f. Tab F. Resource Management documentation.

g. Tab G. All current waivers for the programs being evaluated.

h. Tab H. A summary of the training institution's efforts/initiatives to collect feedback/lessons learned/recommendations from the field and other key stakeholders, and results and actions taken.

i. Tab I. The institution's accreditation schedule and accreditation status of institutions evaluated (if applicable).

6. The Team Leader for this self-assessment is {name, phone number, e-mail address.} The POC for scheduling assistance/accreditation visits to this education/training institution is {name, phone number, e-mail address.}

Enclosures

SIGNATURE BLOCK
XXXXXXXXXX
XXXXXXX, XXXXXXX
XXXX

CF: HQ, TRADOC QAO

Self-Assessment Report
for {name of training institution}

{Information in brackets provides guidance for completing this report. Comments should be concise and to the point.}

1. Executive Summary

The purpose of this document is to report the results of the {initial military training, institutional leader development, or RC TASS Training Battalion} self-assessment completed by {name of training institution} IAW HQ, TRADOC Policy Memorandum, TRADOC Accreditation of Initial Military Training, Institutional Leader Development and Combat Training Center Programs, ATTG-CD, dated 11 April 2002. {Summarize main findings}

2. QA POC

{Identify primary POC for coordination with Accreditation Team.}

3. Conduct of Training

(a) {Identify strengths in the conduct of training.}

(b) {Identify limitations that hinder conduct of training.}

(c) {Identify areas that were deficient and what you did to correct them. If they were not corrected, provide the reason why and the corrective actions planned.}

(d) {Identify training and education initiatives planned for subsequent years to meet assessed shortfalls and new directives for conduct of training. Indicate those that are currently resourced, those that are programmed in the following year's budget, and those that are currently unresourced.}

(e) {Identify Higher Headquarter Issues (HHI) to include DA; HQ, TRADOC; and/or TIM issues/concerns) that should be noted. Include your recommendations as appropriate.}

4. Training Support

(a) {Identify strengths with training support.}

(b) {Identify limitations that hinder training support.}

(c) {Identify areas that were deficient and what they did to correct them. If they were not corrected, provide the reason why and the corrective actions planned.}

(d) {Identify training and education initiatives planned for subsequent years to meet assessed shortfalls and new directives for training support. Indicate those that are currently resourced, those that are programmed in the following year's budget, and those that are currently unresourced.}

(e) {Identify Higher Headquarter Issues (HHI) to include DA; HQ, TRADOC; and/or TIM issues/concerns) that should be noted. Include your recommendations as appropriate.}

5. Training Development

(a) {Identify strengths in training development.}

(b) {Identify limitations that hinder training development.}

(c) {Identify areas that were deficient and what they did to correct them. If they were not corrected, provide the reason why and the corrective actions planned.}

(d) {Identify training and education initiatives planned for subsequent years to meet assessed shortfalls and new directives for proponent functions. Indicate those that are currently resourced, those that are programmed in the following year's budget, and those that are currently unresourced.}

(e) {Identify Higher Headquarter Issues (HHI) to include DA; HQ, TRADOC; and/or TIM issues/concerns) that should be noted. Include your recommendations as appropriate.}

6. General Comments {Highlight significant performance, accomplishments, and/or achievements of faculty, students, or the institution in general since the last accreditation. This provides the training institution an opportunity to boast on their achievements. }

7. Attachments {Attach the following**}**

a. Tab A. { Commander's Training/Education Guidance, Directives, and Policies. This should include the institution commander's mission, vision, intent (priorities); any guidance issued to directorates for current and out year strategic planning (strategic direction); and policy letters and/or memorandums. Intent of this attachment is to provide the Accreditation Teams with insight on how the institution is or is not aligned with higher headquarter guidance.}

b. Tab B. {An annotated copy of the Accreditation Standards List showing self-rating for each standard and any supporting documentation, to include explanation of standards not met.}

c. Tab C. {Organizational chart to include names and titles of Directors and Division Managers, phone numbers, and e-mail addresses. Functions of the various organization should be identified (e.g., 4^{th} BN, 6^{th} BDE is responsible for Officer Basic Training and CCC, or SPIO is responsible for Strategic Plans and Integration.)**}**

d. Tab D. {A copy of supporting TDA/TOE and current UMR.}

e. Tab E. {Instructions to the Accreditation Team on how to electronically access required documentation for courses that will be observed during the accreditation visit. Documentation should include, <u>but not be limited to</u>, lesson plans (for those to be observed), training schedules, institution SOP, critical task lists, POI, Student Evaluation Plans, Course Management Plans (as required), and Course Maps. The documentation may reside on the proponent's homepage, ASAT Database, Reimer Digital Library, FTP site, or other electronically accessible locations. Non-observed course documentation needs to be available.**}**

f. Tab F. In addition to the information available to the Accreditation Team from other sources (e.g., Installation Contracts on the DCSRM webpage and the Training Development Prioritization Workload managed by DCSOPS&T) we are providing the additional resource management documentation to assist you: {e.g., most current Monthly Status Reports, Unit Manning Reports, Training Development Plans, Project Management Plans, POM Submissions, Long and Short Term Training Strategies, and TRADOC Budget Guidance.}

f. Tab G. {Current waivers.}

h. Tab H. {Description of institutions efforts to collect feedback/lessons. Learned/recommendations from the field and other key stakeholders. Include a summary of these results and related actions.}

i. Tab I. {The Institution's Title XI plan and program, if the institution accredits Title XI organizations.}

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Job Aid For Self-Assessment

This job aid assists the school in performing a self-assessment to ensure standards established by HQ, TRADOC have been met prior to the Accreditation Team visits. The self-assessment process should be based on the Accreditation Standards Guide (i.e., instituted standards) established by HQ, TRADOC Quality Assurance Office (QAO). A Self-Assessment Report will be prepared and forwarded to the IET or Leader Development Accreditation Team (as appropriate) and HQ TRADOC QAO.	
Purpose of a Self-Assessment is to:	
	a. Demonstrate that your school meets the accreditation standards established by HQ, TRADOC QAO.
	b. Provide an objective, critical evaluation of the school's performance (strengths, weaknesses and challenges) and specific recommendations for improvement
	c. Identify ways for your school to sustain strengths, correct weaknesses and improve training.
	d. Analyze the resources and effectiveness of your institution in fulfilling its mission.
	e. Serve as a baseline for measuring progress in the coming decade and provides a sound basis for institutional planning and improvement.
	f. Demonstrate that performance, competence, and achievements of students who complete programs are commensurate with the certificates, diplomas, and degrees awarded by the institution.

PREPARING FOR SELF-ASSESSMENT		
1.	Identify a lead POC in the QAO for the self-assessment and accreditation team visits	
2	Establish the self-assessment team.	
	a.	Establish e-mail lists to keep all self-assessment team members apprised of daily events.
	b.	Establish POCs within relevant department offices who will need to be contacted during the self-assessment.
3	Establish a time-line for completing the self-assessment.	
4	Provide team members an orientation of the self-assessment requirements and review/provide procedures for conducting self-assessment.	
5	Examine previous accreditation/evaluation reviews.	
6	Assist/provide guidelines to all institutional departments for preparing a departmental self-assessment report to include:	
	a.	Mission statement.
	b.	Evaluation of departmental goals and accomplishments.
	c.	A list of initiatives for subsequent years based on the evaluation (to include those that require new resources).

CONDUCT SELF ASSESSMENT		
1.	Use the Accreditation Standards Guide to perform a thorough examination of your school for each focus area (i.e., Education/Training Program, Infrastructure, and Faculty and Staff)	
2.	Determine if criteria are being met for each applicable standard by:	
	a.	Using the annotated references.
	b.	Applying guidelines.
3.	Assess institution against accreditation standards guide	
	a.	Assess to determine current strengths and areas in need of improvement
	b.	Assess how areas in need of improvement identified in previous accreditation have been corrected.
4.	Document recommendations to correct areas in need of improvement.	
5.	Follow-up to ensure recommendations/corrections are incorporated.	
6.	Annotate areas within each focus area that are not corrected and why.	
7.	Prepare report documentation	
	a.	Document assessment findings in report.
	b.	Collect pre-visit documentation for Accreditation Team.
8.	If your school does not meet a standard(s), then you must create or modify written directives, policies, practices and procedures to bring the operation of your school into compliance with the established standards.	
9.	Prepare documentation for IMT or Institutional Leader Development Accreditation Team (as appropriate) as outlined in the Pre-visit Documentation Requirements column on the Accreditation Standards Guide. (**Note:** Mandatory documentation is not a requirement for the schools during their self-assessment. This is for the Accreditation Team.)	

PREPARE SELF ASSESSMENT REPORT			
1.	Prepare a Self-Assessment Report. Report should be accurate, complete and well documented. Provide any supporting documents as appendices. Report/Format should include:		
	a.	Executive Summary – to summarize main findings.	
	b.	Institutional Purpose – provides information concerning the institution's purpose, to include the mission statement and other information as desired (i.e., vision and goals).	
	c.	Organization	
		(1)	Describe the organization to include an organizational chart.
		(2)	Identify QAO POC involved with development, review, and quality control of training and/or the preparation and conduct of the institutional self-assessment.
		(3)	Identify noteworthy strengths or limitations concerning the

			institution's organizational structure and training management.
		(4)	Identify areas that were deficient and if they were corrected. If they were not corrected, provide the reason why.
	d.	Education/Training Program	
		(1)	Detail the results of self-assessment for this focus area.
		(2)	Identify any major changes planned for current education/ training programs and explain possible effect on current training.
		(3)	Identify how internal and external feedback is utilized in revising education/training programs.
		(4)	Identify the process used to ensure changes in doctrine, tactics, techniques and procedures are incorporated into training.
		(5)	Identify noteworthy strengths or limitations concerning the institution's programs and curriculums.
		(6)	Identify areas that were deficient and if they were corrected. If they were not corrected, provide the reason why.
		(7)	Compile Pre-visit Documentation for Accreditation Team visit.
	e.	Staff and Faculty	
		(1)	Detail the results of self-assessment for this focus area.
		(2)	Describe orientation, training and updating procedures established for faculty and staff members.
		(3)	Describe faculty development programs available for improving instructional skills and increasing subject matter mastery.
		(4)	Identify strengths or limitations concerning the institution's faculty selection, qualifications, retention, or development.
		(5)	Identify areas that were deficient and if they were corrected. If they were not corrected, provide the reason why
		(6)	Compile Pre-visit Documentation for Accreditation Team visit.
	f.	Infrastructure	
		(1)	Detail the results of self-assessment for this focus area.
		(2)	Identify noteworthy strengths or limitations concerning the institution's infrastructure.
		(3)	Identify areas that were deficient and if they were corrected. If they were not corrected, provide the reason why
		(4)	Compile Pre-visit Documentation for Accreditation Team visit.

	g.	Evaluation and Quality Control	
		(1)	Explain the procedures used to ensure the proper target audience is receiving the training.
		(2)	Explain how the institution evaluates student's success in attaining training objective
		(3)	Describe the total evaluation program.
		(4)	Explain procedures used to ensure instructional standardization.
		(5)	List the remedial programs or assistance provided for students experiencing difficulty completing course work satisfactorily.
		(6)	Describe how program deficiencies are identified and required instructional or curriculum modifications are coordinated.
		(7)	Identify noteworthy strengths or limitations concerning the institution's QA Program and quality control mechanisms.
2.	Final drafts are to be reviewed by all appropriate/required personnel to ensure concurrence with entire report and certification of accuracy (institution measures up to each standard). **Note:** School determines appropriate personnel.		
3.	Report should be provided to the respective Accreditation Team no later than 45 days prior to their visit.		
4.	Provide copies of any written policies, manuals or evaluation tools revised or indoctrinated since the last accreditation.		
5.	If any changes occur to the report between the time it was provided to the respective Accreditation Team and their scheduled visit, a supplement to the report should be provided.		

Tab H

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Format for Initial Military and Institutional Leader Development Training Accreditation Report to HQ TRADOC

Cover Letter

The cover letter is written by the CAC QAO Director or AAC QAO Director to Ch, TRADOC QAO, DCSOPS&T, with synopsis of the accreditation and recommendations for accreditation. Cover letter will address separately CG, CAC or CG, AAC command items of interest.

Part I – Accreditation Documentation

Executive Summary

Purpose - Summary of the goals and objectives of the accreditation visit. Synopsis of the planning, preparation, and execution of the accreditation (paints the picture for the reader).

Recommendations for Accreditation Rating – Gives CG, CAC and CG, AAC recommendations for accreditation status for the Initial Military Training and Institutional Leader Development Training (i.e., Professional Military Education Programs of the Branch Proponent. Includes signed document by respective commander.

Summary - Overall assessment of the training and education based on the team's findings, conclusions, and recommendations.

Appendices – (AAC will have different appendices based on the programs being accredited – BCT, AIT, WOCS, OCS, DSS….)

Appendix A — OES - Findings, Conclusions, and Recommendations (Includes Appendix 4 to the TRADOC Accreditation Policy Memorandum which shows which standards the courses met and Appendix 5 with supporting documentation from job aids). For conduct of training, training support and training development categories, include paragraphs identifying recommendations for the branch proponent regarding its initial military training and professional military education programs:

1. Sustain
2. Improve
3. Develop

Appendix B	WOES - Findings, Conclusions, and Recommendations. (Includes Appendix 4 to the TRADOC Accreditation Policy Memorandum which shows which standards the courses met and Appendix 5 with supporting documentation from job aids). For the categories conduct of training, training support and training development, paragraphs include: 1. Sustain 2. Improve 3. Develop
Appendix C	NCOES - Findings, Conclusions, and Recommendations. (Includes Appendix 4 to the TRADOC Accreditation Policy Memorandum which shows which standards the courses met and Appendix 5 with supporting documentation from job aids). For the categories conduct of training, training support and training development, paragraphs include: 1. Sustain 2. Improve 3. Develop
Appendix D	Higher Headquarter Issues. State the actions and the responsible higher headquarter working them; include issues that need to be worked by HQ, TRADOC.
Appendix E	Action Plan - one stop shopping for all the team's recommendations – recommendation number; location of recommendation in report; whether it is a near, mid, or long term action; priority and the responsible staff agency for developing and implementing the recommendation.
Appendix F	Certified Team Evaluators (names, job titles, location).
Appendix G	In brief and out brief to CG or DCG (omitted; available upon request from CAC/AAC QAO.
Appendix H	QA Process – Describes the methodology of how the team planned, prepared, and executed the accreditation – surveys, focus groups, personal interviews, data collection, personal observations (omitted; available upon request from CAC/AAC QAO).
Appendix I	QA Work Plan - detailed schedule for the team's visit (omitted; available upon request from CAC/AAC QAO).

Appendix …. Special Appendices (if required) – material relevant to the report.

Part II - CG, CAC Special Items of Interest

Items evaluated

Findings, Conclusions, and Recommendations

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Notification of Accreditation Status

ATTG-CD

MEMORANDUM FOR {Commandant/Commander of Training Institution}

SUBJECT: Notification of Accreditation Status for {Training Institution}

1. References:

a. {Accreditation recommendation from Army Accessions Command Quality Assurance Office (AAC QAO) for Initial Military Training}

b. {Accreditation recommendation from Combined Arms Center Quality Assurance Office (CAC QAO) for Institutional Leader Development}

c. Memorandum, HQ TRADOC, Deputy Commanding General/Chief of Staff, 11 Apr 02, subject: TRADOC Accreditation of Initial Military Training, Institutional Leader Development and Combat Training Center Programs

2. Based on recommendations from the AAC and CAC QAOs, the *{training institution}* has received *{Provisional/Conditional/Full/Learning Institution of Excellence}* accreditation status to conduct Institutional Leader Development and Initial Military Training. Your accreditation certificate is at Enclosure 1.

3. *Use the applicable paragraph below as the third paragraph of your memorandum depending upon level of accreditation received.*

If provisional accreditation is received, insert the following paragraph:

This accreditation status will require a re-visit. The following actions must be taken to achieve full accreditation:

a. The training institution:

(1) Begins corrective actions to correct the deficiencies noted as “Not Met” on the Accreditation Standards Lists.

(2) Provides to the appropriate accreditation team, 30 days prior to the follow-up visit, a memorandum reporting corrective actions taken by the institution to ensure that deficiencies that were observed but corrected on-the-spot do not recur.

b. The appropriate accreditation team will:

(1) Schedule a follow-up evaluation. The accreditation team will notify the institution electronically with delivery receipt requested or via certified mail and contact the institution by telephone to make preparations for a follow-up visit.

(2) Conduct a follow-up visit within 12 months to inspect those courses or areas in the institution that did not meet accreditation standards. It may not be necessary to re-evaluate those courses or areas of the institution that met accreditation standards during the initial accreditation visit.

Or

If conditional accreditation is received, insert the following paragraph:

The following actions must be taken to improve the conditional accreditation status:

a. The institution will respond to the appropriate accreditation team with a written report, in the time specified (6 months for RC training battalions; 60 days for other training institutions, with the following:

(1) Corrective actions taken by the institution to ensure deficiencies that were observed, but which the institution fixed on the spot, do not recur.

(2) Actions taken by the institution to correct and prevent the recurrence of deficiencies for those items listed as “Not Met” on the Accreditation Standard List.

b. The appropriate accreditation team will:

(1) Review the report of corrective action.

(2) If report of corrective action is satisfactory, report to HQ TRADOC that the deficiencies have been corrected and recommend accreditation rating be upgraded to the appropriate level.

Or

If full accreditation is received, insert the following paragraph:

HQ, TRADOC appreciates the dedication and hard work of all personnel committed to ensuring the {training institution} received “full accreditation” status. This achievement demonstrates your commitment to ensuring that your training program meets the competency needs of today’s Army and the Objective Force. Your commitment to the high ideal is to be commended.

Or

If Learning Institution of Excellence designation is received, insert the following paragraph:

HQ, TRADOC would like to take this opportunity to congratulate your training institution on receiving the designation “Learning Institution of Excellence,” the highest accreditation level possible. {Training institution} has gone beyond the call of duty to achieve this honor and I congratulate everyone for the dedication and hard work that contributed to this coveted distinction.

4. POC for this action is Ms. Rachel Serio, Chief, HQ, TRADOC QAO, DSN 680-5576.

Encl

CG TRADOC
Signature Block

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Format of Proponent Accreditation Team Recommendation to their Commandant of NCOA and/or RC TASS BN Accreditation

REPLY TO
ATTENTION OF:

Office Symbol Date

MEMORANDUM FOR Commandant, {Proponent School}

SUBJECT: Accreditation and Executive Summary for the {NCOA and/or RC TASS Training BN accredited}

1. The {Proponent School} accreditation team conducted an Accreditation of the {RC TASS Training BN} from {dates}.

2. Accreditation Rating: {Specify accreditation recommendation}

3. Strengths:

   a.

   b.

   c. etc.

4. Shortcomings: (Include shortcomings and recommendations for improvements.)

   a.

   b.

   c. etc

5. Development: (Include recommendations for developments.)

6. Higher Headquarters Issues:

7. General Comment:

Office Symbol
SUBJECT:

8. The certified evaluators for this accreditation were {names}.

9. POC

Appropriate Signature Block
{Center or Proponent School Chief, QAO}

Sample Final Accreditation Report to NCOA and/or RC Tass BN from Proponent School

Office Symbol Date

MEMORANDUM THRU: Commander, XXXth Division (IT) (See TRADOC Reg 350-70, para VIII-2-9, for distribution.)
Commander, Combat Support School Brigade, Region X

FOR Commander, Infantry School Battalion, Region X

SUBJECT: Accreditation of the Region X Signal School Battalion

1. The Region X Signal School Battalion is awarded the status of {provisional, conditional, full accreditation or Learning Institute of Excellence}.

2. The U. S. Army Signal School Accreditation Evaluation Team evaluated the Signal School Battalion in Region X during school year 1998. The evaluation team observed the following training:

a. 4-6 Feb 98 at location - MOSQ 12B10 - IDT.

b. 11-13 Mar 98 at location - MOSQ 51B10 - IDT.

c. 3-4 Jun 98 at location - ANCOC 62N40 - IDT.

d. 16-19 Jul 98 at location - MOSQ 12C10, BNCOC 12B30, ANCOC 62N40 – AT.

e. 18-20 Jun 98 at Region X Combat Support Brigade - training support records.

3. Strengths:

a. Training Support.

(1) School battalion is complying with all regulatory standards governing school administration.

(2) School battalion has all equipment and materials required to conduct and support training.

Office Symbol
SUBJECT:

b. Conduct of Training. School is effectively conducting training IAW established standards.

4. Shortcomings. Billets do not comply with requirements of TRADOC Reg 351-10.

5. Higher Headquarters Issues: Billets at the annual training site do not comply with requirements of TR 351-10 or AR 210-50. Despite the school battalion's efforts, the post has not given high priority to Annual Training in assigning space. Therefore, the school battalion cannot adequately care for soldiers nor set the example necessary for training noncommissioned officers. The {proponent school} will raise this issue to the Deputy Chief of Staff for Personnel, Infrastructure and Logistics.

6. General Comments. (If none, delete this paragraph altogether.)

7. The certified evaluator serving as Team Chief for this evaluation was J. Doe.

8. Point of contact at the U.S. Army Signal School is J. Doe, DSN xxx-xxxx or commercial (xxx) xxx-xxxx, Internet: userid@school.post.army.mil.

Appropriate Signature Block

Encl
Team Recommendation Memo
Standards Guide with notes
CF:
HQ, TRADOC, ATTN: ATTG-CD, Fort Monroe, VA 23651
(See TRADOC Reg 350-70, para VIII-2-9, for other copies furnished.

Tab I

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NOTE To prevent proliferation of non-doctrinal terms/processes that create confusion in the TD and training environments: proponents, contractors, or government/private institutions/individuals working TD and training policy, processes, products, and procedures (to include, but not limited to Force XXI training strategy initiatives/plans) will not incorporate terminology or processes that are not in accordance with this regulation and with training doctrine/training development doctrine/ doctrine unless approved by ODCST/ODCSDOC.

Glossary

Section I: Abbreviations

ACRONYM	MEANING
AAP	• Army Apprenticeship Program • Army Acquisition Process
AAR	After-action Review
ABCS	Army Battle Command Systems
AC	• Active Component • Assistant Commandant
ACAT	Acquisition Category
ACC	Army Correspondence Course
ACCP	Army Correspondence Course Program
ACE	American Council on Education
ACES	Army Continuing Education System
ACETS	Army Corresponding Education and Training System
ACOR	Assistant contracting officer's representative
ACR	Advanced Concepts and Requirements
ACTEDS	Army Civilian Training Education and Development System
ACTD	Advanced Concept Technology Demonstrations
ADCATT	Aid Defense Combined Arms Tactical Trainer
ADCST	Assistant Deputy Chief of Staff for Training
ADCST-E	Assistant Deputy Chief of Staff for Training-East
ADCST-S	Assistant Deputy Chief of Staff for Training-Simulations
ADCST-W	Assistant Deputy Chief of Staff for Training-West
ADL	Army Doctrine Literature
ADO	Army Digitization Office
ADP	Automated Data Processing
ADT	Active Duty for Training
ADTDL	Army Doctrine and Training Digital Library
ADTL	Armywide doctrinal and training literature
ADTLP	Armywide Doctrinal and Training Literature Program
AFARS	Army Federal Acquisition Regulation Supplement
AFDLC	Armed Forces Distance Learning Council
AFMS	Armed Forces Management School
AGPP	Armywide GTA Prioritization Program
AI	Artificial intelligence
AIEP	Army Ideas for Excellence Program
AIMMM	Artificially Intelligent Managers Media Model
AIMS	Automated Instructional Management System
AIMS-R	Automated Instructional Management System-Redesign
AIPD	Army Institute for Professional Development
AIT	Advanced Individual Training
ALC	Army Learning Center
ALMC	Army Logistics Management College
ALP	Army Long-range Plan
ALRP	Army Long-range Planning
ALRPG	Army Long-range Planning Guidance
ALRTP	Army Long-range Training Plan
AMC	Army Materiel Command
AMEDD	Army Medical Department
AMEDDCS	Army Medical Department Center and School
AMIM	Army Modernization Information Memorandum
AMM	Army Modernization Program
AMOPS	Army Mobilization and Operations Planning System
AMSCO	Army Management Structure Code
AMSO	Army Models and Simulation Office
AMT	Army Modernization Training
AMTAS	Army Modernization Training Automation System
ANCOC	Advanced Noncommissioned Officer Course
AoA	Analysis of Alternatives
AOC	Area of Concentration
AOR	Area of Responsibility
AOSP	Army Occupational Survey Program (See ODARS)
APFT	Army Physical Fitness Test
AR	• Army Regulation • Army Reserve
ARCOM	Army Command
ARI	Army Research Institute
ARISS	Army Recruiting Information Support System
ARNG	Army National Guard
ARP	Acquisition Requirements Package
ARPERCEN	Army Reserve Personnel Center
ARPRINT	Army Program for Individual Training
ARTEP	Army Training and Evaluation Program
ASAT	Automated Systems Approach to Training
ASCC	• Air Standardization Coordination Committee • Army Service Component Commanders
ASI	Additional Skill Identifier
ASP	Advanced Simulation Program
ASVAB	Armed Services Vocational Aptitude Battery
AT	• Annual Training • Army Training
ATA	Army Technical Architecture
ATC	Army Training Center
ATFA	Army Training Functional Architecture
ATIMP	Army Training Information Management Program
ATL	Army Training Literature
ATM	Army Training Model
ATRM-2	Army Training Management Resourcing
ATRRS	Army Training Requirements and Resources System
ATSC	Army Training Support Center
ATTA	Army Training Technical Architecture
ATXXI	Army Training XXI
AUTL	Army Universal Task List
AVCATT	Aviation Combined Arms Tactical Trainer
AVI	Audio video interleave
AVPRO	Audiovisual Production Officer
AWE	Advanced Warfighting Experiment
BASE	Basic Army Skills Exam
BBS	• Bulletin Board Service • Brigade/Battalion Battle Simulation
BC	Branch Code
BCBL	Battle Command Battle Lab
BCE	Base-level commercial equipment
BCTP	Battle Command Training Program
BDE	Brigade
BFA	Battlefield Functional Area
BFITC	Battle Focused Instructor Training Course
BLT	Basic Leadership Training
BLTM	Battalion Level Training Model
BMG	Budget Manpower Guidance
BN	Battalion
BNCOC	Basic Noncommissioned Officer Course
BOI	Basis of Issue
BOIP	Basis of Issue Plan
BOS	Battlefield Operating Systems
BPC	Battle Projection Center
BSC	Battle Simulation Center
BSEP	Basic Skills Education Program
C2	Command and Control
CA	Combat Arms
CAC	Combined Arms Center
CAD	Course Administrative Data
CAI	Computer-aided instruction
CAL	Center of Army Leadership

Continued on next page

CALFEX	Combined Arms Live Fire Exercise
CALL	Center for Army Lessons Learned
CAN	Campus Area Network
CANE	Chemical and Nuclear Environment reports
CAPR	Capability Requirement
CAR	Chief, Army Reserve
CARDS	Catalog of Army Requirements
CAS	• Compute-Assisted Survey • Close Air Support
CASCOM	Combined Arms Support Command
CAT	Combined Arms Training
CATS	Combined Arms Training Strategy
CATT	Combined Arms Tactical Trainer
CBE	Command Budget Estimate
CBI	Computer-based instruction
CBS	Corps Battle Simulation
CBT	Computer-based training
CCB	Configuration Control Boards
CCI	Compliant, compatible, interoperable
CCTT	Close Combat Tactical Trainer
CDR	Commander
CDRL	Contract Data Requirements List
CD-ROM	Compact Disk-Read Only Memory
CFDAD	Component Functional Data Administrator
CFP	• Contingency Force Pool • Concept Formulation Process
CFX	Command Field Exercise
CG	Commanding General
CGA	Color Graphics Adapter
CGF	Computer Generated Force
CGSOC	Command and General Staff Officer Course
CICA	Competition in Contracting Act
CINC	Commander-in-Chief
CLEP	College Level Examination Program
CLIW	Course Length in Weeks
CMF	Career Management Field
CMI	• Computer-managed instruction • Classified Military Information
CMP	Course management plan
CMTC	Combat Maneuver Training Center
CNGB	Chief, National Guard Bureau
CO	• Commissioned Officer • Commanding Officer
COB	Command Operating Budget
CODAP	Comprehensive Occupational Data Analysis Program
CODEC	compression/decompression
COE	Common Operating Environment
CofC	Council of Colonels
COFT	Conduct of Fire Trainer
CONOP	Contingency operations
CONUS	Continental U.S.
CONUSA	The Numbered Armies in the Continental United States
COR	Contracting Officer's Representative
COTR	Contracting Officer's Technical Representative
COTS	Commercial off-the-shelf
CF	Career Field
CP	Career Program
CPP	Civilian Pay Plan
CPX	Command Post Exercise
CRC	Camera-Ready Copy
CRD	Capstone Requirements Document
CRI	Criterion-referenced instruction
CRT	Criterion-referenced test/testing
CS	Combat Support
CSA	Chief of Staff of the Army
CSI	Computer Supported Instruction
CSS	Combat Service Support
CSSTSS	Combat Service Support Tactical Simulation System
CT	Combat table
CTA	Consolidated Training Activities
CTC	Combat Training Center
CTSWG	Consolidated Training Support Work Group
CTT	Common Task Test
CUI	Controlled unclassified information
CYBIS	Cyber-based Instructional System
DA	Department of the Army
DAC	Department of the Army Civilian
DAVIPDP	• Department of the Army Audiovisual Information • Production and Distribution Program
DAVIS	Defense Automated Visual Information System
DCD	Directorate of Combat Developments
DCG	Deputy Commanding General
DCSCD	Deputy Chief of Staff for Combat Development
DCSDOC	Deputy Chief of Staff for Doctrine, HQ TRADOC
DCSINT	Deputy Chief of Staff for Intelligence
DCSOPS	Deputy Chief of Staff for Operations and Plans
DCSPER	Deputy Chief of Staff for Personnel
DCSSA	Deputy Chief of Staff for Simulations and Analysis
DCST	Deputy Chief of Staff for Training
DD	Defense Department
DDL	Delegation of Disclosure Authority Letter
DDLI	Direct Data Link Interconnectivity
DDT	Doctrine Tactics and Training
DEA	Data Exchange Annex
DEPEX	Deployment exercise
DET	Displaced (cascaded) Equipment Training
DETT	Displaced Equipment Training Team
DFARS	Defense Federal Acquisition Regulation Supplement
DID	Data Item Description
DIF	Difficulty, Importance, Frequency
DIS	Distributed Interactive Simulation
DITIS	Defense Instructional Technology Information System
DIV(T)	Division Institutional Training
DLMP	Doctrinal Literature Master Plan
DO	Delivery Order
DoD	Department of Defense
DODD	Department of Defense Directive
DoDI	Department of Defense Instruction
DOES	Directorate of Evaluation and Standardization
DOIM	Directorate of Information Management
DOPP	Delivery Order Performance Plan
DOT	Directorate of Training
DOTD	• Directorate of Training and Doctrine • Directorate of Training Development
DRAG	Doctrine Review and Approval Group
DSI	Defense Simulation Internet
DSN	Defense Switching Network
DSS	Drill Sergeants School
DSTIS	Devices and Systems Training Information System
DTAC	Digitized Training Access Center
DTEA	Developmental Training Effectiveness Analysis
DTIC	Defense Technical Information Center
DTLOMS	Doctrine, Training, Leader Development, Organization, Materiel, and Soldiers
DTT	Doctrine and Tactics Training
DTTP	Doctrine, Tactics, Techniques, and Procedures
DUSA(OR)	Deputy Under Secretary of the Army for Operations and Research
DVIAN	Defense Visual Information Activity Number
EAATS	Eastern ARNG/Aviation Training Site
EAC	Echelons Above Corps
ECA	Early Comparability Analysis
EGA	Extended Graphics Adapter
EIDS	Electronic Information Delivery System
ELO	Enabling Learning Objectives
ENCATT	Engineer Combined Arms Tactical Trainer
EOR	Element of Resource
ET	Embedded Training
ETM	Extension Training Material
ETV	Estimated Time Value
EUSA	Eighth US Army
EUT&E	Early User Test and Evaluation

Continued on next page

FA	• Functional Area • Field Artillery
FAA	Functional Area Assessment
FAD	Funding Authorization Document
FAMSIM	Family of Simulations
FAR	Federal Acquisition Regulation
FARP	Forward Area Rearming and Refueling Point
FCR	Functional Chief's Representative
FCX	Fire Coordination Exercise
FDO	Foreign Disclosure Office
FDT&E	Force Development Testing and Experimentation
FISTV	Fire Support Team Vehicle
FM	Field Manual
FOC	Future operating capability
FORSCOM	Forces Command
FP	Functional Proponent
FSC	Functional Standing Committees
FSCATT	Fire Support Combined Arms Tactical Trainer
FTP	File Transfer Protocol
FTX	Field Training Exercise
FUE	First Unit Equipped
FUED	First Unit Equipped Date
FY	Fiscal Year
GAR	Government Representative
GCE	Government Cost Estimate
GFI	Government-Furnished Information
GFM	Government Furnished Material
GOSC	General Officer Steering Committee
GOTS	Government off-the-shelf
GPO	Government Printing Office
GTA	Graphic Training Aid
HARDMAN	Hardware/manpower
HAZCOM	Hazardous Communications
HAZMAT	Hazardous Material
HHC	Headquarters and Headquarters' Company
HHI	Higher headquarters' issues
HQ	Headquarters
HSC	Health Services Command
HTI	Horizontal Technology Integration
HTTP	Hyper Text Transport Protocol
HUMRRO	Human Resources Research Organization
IAW	in accordance with
IBSO	Installation Branch Safety Office
ICH	Instructor contact hours
ICT	Integrated Concept Team
ICW	• In coordination with • Interactive Courseware
IDIQ	Indefinite delivery-indefinite quantity
IDT	Inactive Duty Training
IET	Initial Entry Training
IETM	Interactive Electronic Technical Manual
IG	Inspector General
IKPT	Instructor and key personnel training
ILS	Integrated Logistics Support
ILSMT	Integrated Logistics Support Management Team
ILSP	Integrated Logistics Support Plan
IMAPI	Interactive Multimedia Application Program Interface
IMI	Interactive Multimedia Instruction
IMS	• Information Management System • International Military Student
IOC	Initial Operational Capability
IOT&E	Initial Operational Test and Evaluation
IP	Internet Protocol
IPT	integrated product teams
IPR	In-Process/Progress Review
IS	Information System
ISA	International Standardization Agreement
ISE	Institutional Self Evaluation
ISR	Individual School Requirement
ISSO	Information Systems Security Officer
ITAAS	Intelligence training Army area schools
ITC	Instructor Training Course
ITO	Invitational travel orders
ITP	Individual Training Plan
ITRO	Interservice Training Review Organization
ITS	Individual Training Strategy
IVD	Interactive Video Disc - a type of IMI
JCLL	Joint Center for Lessons Learned
JCS	Joint Chiefs of Staff
JOIN	Joint Optical Information Network
JPM	Job Performance Measure
JROC	Joint Requirements Oversight Council
JROTC	Junior Reserve Officers Training Corps
JROTCM	Junior Reserve Officers Training Corps Manual
JRTC	Joint Readiness Training Center
JSEP	Job Skills Education Program
JSIMS	Joint Simulations
JTA	Joint Table of Allowances
JTA-A	Joint Technical Architecture-Army
JTTP	Joint Tactics, Techniques, and Procedures
JV	Joint Venture
JWG	Joint Working Group
KEI	Key Enabling Investment
KO	Contracting Officer
LAN	Local Area Network
LCX	Logistics Coordination Exercise
LFX	Live Fire Exercise
LIC	Language Identifier Code
LO	Learning Objective
LOA	Letter of Agreement
LRRDAP	Long Range Research, Development, and Acquisition Plan
LSA	Logistics Support Analysis
LTP	Leader Training Program
LTX	Lane Training Exercise
LWU	Land Warfare University
M&S	Models and Simulations
MAADP	Mission Area Analysis Deficiency Program
MAC	Maintenance Allocation Chart
MACOM	Major Army Command
MANPLAN	Management Plan
MANPRINT	Manpower and Personnel Integration
MAPEX	Map exercise
MARC	Manpower Authorization Requirement Criteria
MCA	• Major Commercial Account • Military Construction Army
MCM	Materiel Change Management
MCX	Movement Coordination Exercise
MDEP	Management Decision Packages
MDR	Milestone Decision Review
MEDCOM	Medical Command
MEDIA	Media Elimination & Design Intelligent Aid
MEP	Master Evaluation Plan
MER	• Manpower Estimate Report • Minimum essential requirement
METL	Mission Essential Task List
METT-T	Mission, enemy, terrain, troops - time
MILCON	Military Construction
MILES	Multiple Integrated Laser Engagement System
MIL-PRF	Military Performance
MIL-STD	Military Standard
MIPR	Military Interdepartmental Purchase Request
MJWG	MANPRINT Joint Working Group
MMTR	Military Manpower Training Reports
MNS	Mission Needs Statement
MOA	Memorandum of Agreement

Continued on next page

MOC	Management of Change
MOI	• Memorandum of Instruction • Method of Instruction
MOPIC	Motion picture
MOPP	Mission oriented protection positive
MOS	Military Occupational Specialty
MOSQ	MOS Qualified
MOU	Memorandum of Understanding
MOUT	Military Operations on Urban Terrain
MPT	• Manpower, Personnel, Training • Mission Training Plan • Modernization Transition Plan
MQS	Military Qualification Standards (to become obsolete)
MQSM	Military Qualification Standards (MQS) Manuals
MQSMCT	MQS Manual of Common Tasks
MRD	Materiel Requirements Document
MRIS	Modernization Resource Information System
MSS	Manpower Staffing Standards
MS-3	Manpower Staffing Standards System
MTG-WESS	Main Tank Gun - Weapon Effect Signature Simulator
MTOE	Modification Table of Organization and Equipment
MTP	Mission Training Plan
MYR	Mid-Year Review
NATO	North Atlantic Treaty Organization
NBC	Nuclear, Biological, and Chemical
NCO	Noncommissioned Officer
NCOA	NCO Academy
NCOES	NCO Education System
NDCC	National Defense Cadet Corps
NDI	Nondevelopmental Items
NET	New Equipment Training
NETP	New Equipment Training Plan
NETT	New Equipment Training Team
NETTSP	New Equipment Training Test Support Package
NG	National Guard
NGB	National Guard Bureau
NHSC	National Home Study Council
NIPRNET	Internet Protocol Router Network
NLT	Not later than
NMS	National Military Strategy
NSC	National Simulations Center
NSTD	Nonsystem Training Devices
NTC	National Training Center
NVD	Night-vision devices
O&S	Operating and Support
OBC	Officer Basic Course
OC	Observer/Controller (OC)
OCONUS	Outside Continental U.S.
OCS	• Officer Candidate School • Optimum class size
ODARS	Occupational Data, Analysis, Requirements and Structure Program (formerly AOSP)
ODCST	Office of the Deputy Chief of Staff for Training
OES	Officer Education System
OFS	Officer Foundation Standards (to become obsolete)
OJT	On-the-job training
OMA	Operations Maintenance Army
ONESAF	One Semi-automated Force
ONS	Operational Needs Statement
OPA	Other Procurement Army
OPLAN	Operations Plan
OPM	Office of Personnel Management
OPORD	Operations Order
OPSGP	Operations Group
OPTEMPO	Operating Tempo
ORD	Operational Requirements Document
OSUT	One-station Unit Training
P3I	Preplanned Product Improvement
PAILS	Publication Automated Information Locator System
PAN	Production Approval Number
PAT	Process Action Team
PBG	Program Budget Guidance
PE	Practical Exercise
PEG	Program Evaluation Group
PEO/PM	Program Executive Officer/Program (or Project) Manager
PERSCOM	Personnel Command
PERSINSCOM	Personnel Information Systems Command
PFTDS	Postfielding Training Development Study
PFTEA	Post Fielding Training Effectiveness Analysis
PGS	Precision Gunnery System
PIN	Production Identification Number
PLDC	Primary Leader Development Course
PM	• Program Manager • Preventive Maintenance
PMCS	Preventive Maintenance Checks and Services
POC	Point of Contact
POI	Program of Instruction
POIMM	Program of Instruction Management Module
POM	Program Objective Memorandum
POM (TPOM)	Program Objective Memorandum (TRADOC)
POTO	Plans, Operations, and Training Officer
PPBES	Planning, Programming, Budgeting, and Execution System
PRA	• Primary Review Authority • Projected Requisition Authority
QA	Quality Assurance
QAR	Quality Acceptance Report
QC	Quality Control
QQPRI	Qualitative and Quantitative Personnel Requirements Information
QSTAG	Quadripartite Standardization Agreement
RAC	Risk Assessment Code
RBE	Reply by Endorsement
RC	Reserve Component
RC3	Reserve Component Course Configuration
RCAS	Reserve Component Automated System
RCE	Regional Coordinating Element
RCS	Reports Control Symbol
RCTDAP	Reserve Component Training Development Action Plan
RCTI	Reserve Component Training Institution
RDA	Research, Development, and Acquisition
RDS	Requirements Data Sheet
RDT&E	Research, Development, Test, and Evaluation
RF	Reserve Forces
RFI	Reserve Forces Intelligence
RGL	Reading Grade Level
RIA	Requirements Integration Approval
RISTA	Reconnaissance, intelligence, surveillance, and target acquisition
RM	Risk management
RMU	Resource Management Update
ROTC	Reserve Officer Training Corps
RPPO	Regional printing and procurement office
RPSTL	Repair Parts Special Tools List
RSI	Rationalization, Standardization, and Interoperability
RTI	Regional Training Institute
RTS	Regional Training Sites
RTS-M	Regional Training Sites - Maintenance
RTS-Med	Regional Training Sites - Medical
RTS-S	Regional Training Sites - Supply
SAF	Semi-automated Force
SAT	Systems Approach to Training
SATBC	Systems Approach to Training Basic Course
SATS	Standard Army Training System
SB	Sustaining Base
SBT	Sustaining Base Training
SBU	Sensitive But Unclassified
SCUBA	Self-contained underwater breathing apparatus

Continued on next page

SCX Staff Coordination Exercise
SDIS STARPUBS DDN Interface System
SE CORE Synthetic Environment Core
SEN Satellite Education Network
SFCT Staff and Faculty Common Training
SFD Staff and Faculty Development
SGI Small Group Instruction
SGITC Small Group Instructor Training Course
SGL Small Group Leader
SI Skill Identifier
SIDPERS Standard Installation Division Personnel System
SIM Simulation
SIMNET Simulation Network
SKO Sets, Kits and Outfits
SM Soldier's Manuals
SMA Sergeants Major Academy
SMCT Soldier's Manual of Common Tasks
SMDR Structured Manning Decision Review
SME Subject Matter Expert
SMMP System MANPRINT Management Plan
SOM Simulation Object Model
SOP Standard Operating Procedure
SOW Statement of Work
SPR Systems Program Review
SQI Skill Qualification Identifier
SRP School Requirements Package
SSG Special Study Group
SSI Special Skill Identifier
STAARS Standard Army After Action Review System
STANAGS Standardization Agreement
STAR Systems Threat Assessment Report
STARPUBS Standard Army Publication System (STARPUBS)
STD System Training Device
STEPR Synthetic Training Environment Periodic Review
STF Special Task Force
STOW Synthetic Theater of War
STP Soldier Training Publication
STRAC Standards in Training Commission
STRAP System Training Plan
STRICOM Simulation, Training, and Instrumentation Command
STX Situational Training Exercise
SVGA Super Video Graphics Array

T&E Test and Evaluation
T&EO Training and Evaluation Outlines
TABE Tests of Adult Basic Education
TACITS Total Army Centralized Individual Training Solicitation
TACSIM Tactical Simulations
TADLP Total Army Distance Learning Program
TADLP MP Total Army Distance Learning Program Master Plan
TADSS Training Aids, Devices, Simulators, and Simulations
TADV See Section II, Terms.
TAG The Adjutant General
TAI TRADOC Acquisition Instruction
TAITC Total Army Instructor Training Course
TAMS Training Ammunition Management System
TAP The Army Plan
TAS Target Audience Soldier
TASC Training Audiovisual Support Centers
TASS Total Army School System
TASSCA Total Army School System Coordinating Activity
TATS Total Army Training System
TATSS TRADOC Automated Training Scheduling System
TBD To be developed
TBG TRADOC Budget Guidance
TBP To be printed
TC
- Technical Coordinator
- Training Circular
- Transportation Corps

TCA TRADOC Contracting Activity
TCP Technical Cooperation Program
TCR Training Capabilities Report
TD Training Development
TDA Table of Distribution and Allowance
TDAA Training Development and Analysis Activity
TDAP Training Development Action Plan
TDFR Training Device Fabrication Request
TDR Training Device Requirement
TDRRC Training Device Requirements Review Committee
TDS Training Device Study
TDSS TRADOC Decision Support System
TDWP-ASAT Training Development Workload Planner-Automated Systems Approach to Training
TDY Temporary Duty
TEA Training Effectiveness Analysis
TEB Technical Evaluation Board
TEC Training Extension Course
TEMO Training, Exercises, and Military Operations
TEMP Test and Evaluation Master Plan
TES Tactical Engagement Simulation
TEWT Training Exercise Without Troops
TEXMIS Training Module Executive Management Information System
TF Task Force
TG Trainer's Guides
THP Take-home packages
TIA Training Impact Analysis
TLO Terminal Learning Objectives
TLRP TRADOC Long-range Plan
TLRTP TRADOC Long-range Training Plan
TM Technical Manual(s)
TMA
- Training Mission Area
- TRADOC Management Activity

TMDE Test Measurement and Diagnostic Equipment
TMEC TRADOC Materiel Evaluation Committee
TMG TRADOC Manpower Guidance
T-MI Training-Modeling Integration
TNET Teletraining Network
TO Training Observation
TOE Table of Organization and Equipment
TOMA Training Operations and Management Activity
TPIO TRADOC Program Integration Office
TPIO-STE TRADOC Program Integration Office for the Synthetic Training Environment
TPIO-TD TRADOC Program Integration Office-Terrain Digitization
TPO TRADOC Project Office
TPO CONSTRUCTIVE TRADOC Project Office for Constructive Synthetic Training Environment
TPO LIVE TRADOC Project Office for Live Training Environment
TPOM TRADOC Program Objective Memorandum
TPO ONESAF TRADOC Project Office for One Semi-automated Force
TPO STOW TRADOC Project Office for Synthetic Theater of War
TPO VIRTUAL TRADOC Project Office for Virtual Synthetic Training Environment
TPO WARSIM TRADOC Project Office for Warfighter 2000 Simulations
TPRISM TRADOC Plan for Reengineering Information Systems Modernization
TPW Training Program Worksheet
TR TRADOC Regulation
TRAC TRADOC Analysis Center
TRADOC Training and Doctrine Command
T-RAP TRADOC Remedial Action Program
TRAP Training Requirements Arbitration Panel
TRAS Training Requirements Analysis System
TREDS-R TRADOC Educational Data System-Redesign
TRM TRADOC Review of Manpower
TSB Task Selection Board

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TSC	Training Support Center
TSM	TRADOC Systems Manager
TSP	Training Support Package
TSR	• Training Status Report • TRADOC Status Report
TTCP	Test Training Certification Plan
TTP	Tactics, Techniques, and Procedures
TTSP	Training Test Support Package
TVT	Television tape
TWGSS	Tank Weapons Gunnery Simulation System
UCC	Unified Combatant Commands
UFR	Unfunded Requirement
UJTL	Universal Joint Task List
USAISC	U.S. Army Information Systems Command
USANCA	U.S. Army Nuclear Chemical Agency
USAPC	U.S. Army Publishing Agency
USAPDC	U.S. Army Publications Distribution Center
USAR	U.S. Army Reserve
USARC	U.S. Army Reserve Command
USAREC	U.S. Army Recruiting Command
USAREUR	U.S. Army Europe
USARPAC	US Army Pacific
USASMA	US Army Sergeant Major Academy
USASOC	US Army Special Operations Command
USATSC	U.S. Army Training Support Center
USMA	U.S. Military Academy
UTA	Unit Training Assembly
VGA	Video Graphics Array
VI	Visual Information
VTC	Video Teleconference
VTT	Video Teletraining
VTTITC	VTT Instructor Training Course
VVA	Verification, Validation & Accreditation
WAATS	Western ARNG/Aviation Training Sites
WAN	Wide Area Network
WarMod	Warfighter Modernization
WARSIM	Warfighter Simulation
WBT	Web-based Training
WFLA	Warfighting Lens Analysis
WFX	Warfighter Exercise
WO	Warrant Officer
WOAC	Warrant Officer Advanced Course
WOBC	Warrant Officer Basic Course
WOCC	Warrant Officer Career Center
WOCS	Warrant Officer Candidate School
WOES	Warrant Officer Education System
WOSC	Warrant Officer Staff College
WOSSC	Warrant Officer Senior Staff Course

Section II: Terms (Glossary of Training and Training Development Terms)

Note: **This section provides standardized definitions of training and training development terms. These definitions will be used for all training and training development correspondence and publications.**

A

Ability
Power to perform an act, either innate or as the result of learning and practice.

Academic time/hours
The total length of time actually required to present training.
- Academic time includes --
  - Conduct of training.
  - Testing students.
  - Conducting AAR.
- An academic hour is 50 minutes.

Academic week
Consists of the number of academic hours that must be trained during any given training week.

Accreditation
The recognition afforded an educational institution when it has met accepted standards of quality applied by an accepted, professional accreditation agency.

Accredited curriculum
Any formal military training curriculum that has been reviewed and approved by a competent accrediting agency to determine the extent to which the curriculum content can be converted to civilian academic credit.

Achievement test
A test for measuring an individual's knowledge and skill accomplishments as a result of training. The achievement measure must be directly related to the training program objectives and performance standards required during training.

Acquisition
The process used to acquire goods and services that begins when the need for a product or service is identified and continues until that need is met.

Action verb
Verb that conveys action/behaviors and reflects the type of performance that is to occur (i.e., place, cut, drive, open, hold). Action verbs must reflect behaviors that are measurable, observable, verifiable, and reliable.

Additional skill identifier (ASI) or officer skill identifier (SI)
Identification of specialized skills that are closely related to, and are in addition to, those required by military occupational specialty or areas of concentration (officers). Specialized skills administrative systems and subsystems, computer programming, procedures, installation management, identified by the ASI or officer SI include operation and maintenance of specific weapons systems and equipment, analytic methods, animal handling techniques, and other required skills that are too restricted in scope to comprise military occupation specialty or AOC. (See ARs 611-101, 611-112, and 600-200).

Adjunctive material
Material that supports a program of instruction and must be used by soldiers to learn the tasks being taught in the program of instruction (i.e., adjunctive material for a lesson on map reading may include a map, compass, and protractor).

Administrative drop
The removal of a student from a formal training program for reasons other than failure to meet minimal academic standards.

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Advanced Concepts and Requirements (ACR)
1 of 3 Army M&S domains. ACR includes experiments with new concepts and advanced technologies to develop requirements in Doctrine, Training, Leader Development, Organization, Materiel, and Soldiers (DTLOMS) which will better prepare the Army for future operations. ACR evaluates the impacts of Horizontal Technology Integration (HTI) through M&S and experimentation using real soldiers in real units under actual battlespace field conditions.

After-action review (AAR)
A professional discussion of an event, focused on performance standards, that enables soldiers to discover for themselves what happened, why it happened, and how to sustain strengths and improve on weaknesses. It is a tool leaders, trainers, and units can use to get maximum benefit from every mission or task.

Analysis
One of five phases of the training development process. It is the process used to determine if training is required; determine who (soldiers/units) needs training; identify the critical tasks they must be able to perform for survival on the battlefield; and identify the standards, conditions, performance measures, and other criteria needed to perform each task. The five types of training analyses:
- Needs Analysis
- Mission Analysis
- Collective Critical Task Analysis
- Job Analysis
- Individual Critical Task Analysis

Analyst
An individual assigned to perform the analysis associated with the training development process. Personnel assigned to this position (or who are detailed to assist in this process) should be trained in their area of responsibility and have a knowledge of commandant/unit mission and structure, analysis techniques, documentation research techniques, and interview techniques. An analyst need not be a subject matter expert but must have access to job experts.

Annual training
The minimal period of annual active duty training a member performs to satisfy the yearly training requirements associated with a Reserve Component assignment. It may be performed during one consecutive period or in increments of one or more days, depending upon mission requirements.

Answer key
A document that shows the answers to each test question and the test standard for each test.

Answer weight reference sheet
A document which provides the subcourse title and number, edition number, credit hours, and lists the test question number, the answer for each question, the assigned weight, and the page number where the answer can be located.

Apprenticeship
A structured training program involving instruction, work experience, and testing, usually for a set period of time, leading to certification in a given area.

Aptitude
The ability of a soldier to acquire skill or show the potential for acquiring skill when given the opportunity and proper training. Aptitude may be the ability to learn a specific skill or the potential to receive general training.

Armed Services Vocational Aptitude Battery (ASVAB)
A series of tests designed under Department of Defense sponsorship which measures potential for training in general occupational areas.

Army Apprenticeship Program
A training program that provides service members the opportunity to gain civilian recognition in a skilled trade related to their military occupational specialty.

Army Civilian Training Education and Development System (ACTEDS)
A system that ensures planned development of civilians through a blend of progressive and sequential operational assignments, institutional training, and self development as individuals progress from entry level to senior positions.

Army Continuing Education System (ACES)
An integrated system of educational opportunities, both academic and nonacademic

Army correspondence course
See "Correspondence course."

Army Correspondence Course Program (ACCP)
An overall program supported by AR 350-1. The ACCP is a formal nonresident extension of the TRADOC service schools. It offers individual and group study enrollments in correspondence courses. Based on course eligibility requirements, individuals enroll at their own discretion and determine their own course of study for either correspondence courses or subcourses. The ACCP offers courses and subcourses free of charge to the US military Active and Reserve Components, ROTC and military academy cadets, authorized federal civilian employees, and non-US citizens who are employed by the DoD. Correspondence materials are also available for foreign military students through the Foreign Military Sales Program. AC and RC soldiers in grades E4 and E5 can accrue promotion points, and RC soldiers can accrue retirement points through the ACCP.

Army correspondence subcourse
See "Correspondence subcourse."

Army Doctrine and Training Digital Library
The information foundation for AT XXI. Allows trainers, trainees, training developers, and doctrine writers to store and retrieve training products and materials via the internet and personal computers. ADTDL features include an electronic card catalog or pointer (transparent to the users) to doctrinal and training information and products stored in various databases/repositories.

Army Modernization Training (AMT)
Required training to support the Army modernization process. AMT includes New Equipment Training (NET) for new, improved, and cascading materiel systems, Doctrine and Tactics Training (DTT), Sustainment Training (ST), unit modernization, deployment, and proponent training.

Army school
Institution authorized by Headquarters, Department of the Army to conduct formal courses for individuals, collective training where required (such as crew training), and training of Army National Guard or U.S. Army Reserve units.

Army Training and Evaluation Program (ARTEP)
The cornerstone of unit training. It is the umbrella program to be used by the trainer and training manager in the training evaluation of units. The ARTEP is a complete program enabling commanders to evaluate and develop collective training based on unit weaknesses, then train the unit to overcome those weaknesses and reevaluate. Success on the battlefield depends on the coordinated performance of collective and individual skills that are taught through the ARTEP MTP.

Army Training and Evaluation Program (ARTEP) Mission Training Plan (MTP) See "Mission Training Plan (MTP)".

Army Training and Evaluation Program (ARTEP) products
See "Army Training and Evaluation Program," "Mission Training Plan," "Drill," and "Exercise."

Army Training Requirements and Resource System (ATRRS)
The Army training management system. It projects inputs, resource requirements, and student accountability and updates military personnel training records. It provides the data for Congressional Military Manpower Training Reports (MMTR), etc.

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Army training system
The concept used by the Army to develop, manage, and conduct training. System components are institutional training, forces (unit) training, and training support.

Army Universal Task List
A common reference system. It is a comprehensive, but not all inclusive, hierarchical listing of Army tasks on or in support of the battlefield. The AUTL is architecturally linked to the Universal Joint Task List (UJTL). The AUTL collectively includes tasks at each level or war, i.e., strategic, operational, and tactical. It may serve as a tool for mission essential task list (METL) development for field commanders, combat developers, analysts, trainers, and planners for analyzing and integrating operations.

Armywide Doctrinal and Training Literature (ADTL)
Includes DA-numbered, indexed, and published publications which are available in a variety of media, e.g., paper, CD-ROM. ADTL publications include FMs, TCs, ARTEP products, STPs, TMs, JROTCMs, and selected DA pams or posters.

Armywide Doctrinal and Training Literature Program (ADTLP)
The Army program for management, prioritization, print/replication, and distribution of ADTL, prescribed forms, and selected DA pamphlets and posters in a medium that supports the Total Army.

Armywide Doctrinal and Training Literature (ADTL) publication hierarchy
A framework that provides the relationship between categories and classifications of all Armywide doctrinal and training publications.

Assignment-oriented training
Training designed to qualify an individual to perform those specific functions associated with the duty position and skill level of the next assignment.

Associated school
A TRADOC school whose primary mission falls within the functional area of TRADOC and is associated with and under the tasking authority of TRADOC for combat developments, training developments, and selected training actions.

Attitude
An internal state that influences an individual's choices or decisions to act in a certain way under particular circumstances.

Attitude measure
An instrument designed to gather information about a person's disposition toward something, such as liking or disliking subject matter.

Audio-only lesson
An audio recording that provides information related to a task, or supporting skill and knowledge training. One type talks a soldier through a series of actions which is generally used in conjunction with hands-on training.

Audit trail
A systemic documentation of decisions made or actions taken.

Authoring system
In interactive courseware, a software that allows an author to generate an instructional program without any explicit programming, simply by specifying the instructional content and teaching logic. It provides an actual lesson framework with an implicit or explicit teaching strategy.

Automated instructional development
The automation of the analysis, design, development, and evaluation of training.

Automated Instructional Management System (AIMS)
A computer system for the management of individual, resident training. It also handles the administrative and scheduling functions at United States Army Training and Doctrine Command schools and Army training centers.

Automated Instructional Management System - Redesign (AIMS-R)
An automated, interactive training information management system which will provide Army schools, training centers, and NCO Academies the capability to develop, administer, and monitor resident and nonresident (correspondence and self-development)individual training during peacetime and mobilization.

Automated Systems Approach to Training (ASAT)
The HQ TRADOC training development automation system under development as a tool for training developers to develop doctrine and training products.

Awareness training
Training used to disseminate information that provides an individual with the basic knowledge/understanding of a policy, program, or system, not a critical task or supporting skill or knowledge. The proponent school identifies the most efficient and economical media to disseminate the awareness training and disseminates as part of a TSP with supporting administrative information. An example is the annual security briefing. It—

- May not be related to course-specific training objectives and takes place outside of POI academic time (although the training material may be passed out during POI time).
- Can be disseminated as handouts, supplemental reading, orientations, etc.
- Is not formally evaluated.

B

Base-level commercial equipment (BCE)
Nonstandard equipment authorized by Table of Distribution and Allowance (TDA) or Joint Table of Allowances (JTA) (except for some type-classified items purchased by TDA organizations). BCE funds can be used to procure non-standard Training Aids, Devices, Simulators, and Simulations (TADSS) with a per item cost of less than $100K. Major Army Commands (MACOMs) may not purchase TADSS using BCE funds unless the items are specifically approved by HQDA (DCSOPS).

Baseline data
Valid and reliable information about the current level of performance of the student population. This data can be used to confirm the need to develop new instruction or to assess differences between student performance before (at baseline) and after instruction.

Basic Skills Education Program (BSEP)
A program which provides soldiers with educational skills essential for progressing in Army careers. The program is a standard, job-related curriculum providing on-duty instruction in prerequisite academic competencies necessary for job proficiency and preparation for advanced training. In coordination with the education services officer, commanders determine which soldiers should be enrolled in the program.

Basis of issue (BOI)
The basis by which an item of equipment (i.e., TADSS) will be issued to the using community.

Note: The BOI for TADSS will normally be different for the AC, RC, and TRADOC service school(s). The desired method of issue is to provide sufficient quantities of TADSS to a Training Support Center (TSC) to support regional training requirements IAW the CATS. The least desired method because of cost is a per-unit BOI whereby a quantity is designated per battalion, brigade, division, etc. Regardless of the way in which the BOI is structured, TADSS will be issued to the supporting TSC and may be "sub-hand receipted" to the user on a temporary or permanent basis. Training-unique ammunition, munitions, and inert items (i.e., dummy) procured as Class V supply items, are stored and issued through ammo supply channels..

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Basis of issue plan (BOIP)
A planning document that lists specific elements (table of organization and equipment- level 1, table of distribution and allowances, common table of allowances, joint table of allowances, and Allied Ordnance Publication) in which a new item of material may be placed, the quantity of item proposed for each organization element, and other equipment and personnel required as a result of the introduction of the new item. The basis of issue plan is not an authorization document.

Battle Drill
See "Drill."

Battlefield Operating Systems (BOS)
The major functions occurring on the battlefield.

Behavior
An observable activity or action. The performance of a skill. See "Skill."

Behavior modification
Methods of influencing behavior, mainly through application of reinforcement and modeling principles.

Branch codes (BC)
Numerical codes assigned in DA Pamphlet 600-3 to represent the branches of the Army in which all officers are commissioned or transferred, trained, developed, and promoted.

Branching
An instructional technique in which the student's next step of instruction is determined by the last response. In automation, the next step may be determined by the pattern of responses to a series of items relating to the subject matter.

Bypassing
In programmed instruction, a technique which permits a student to omit certain portions of material because of prior knowledge.

C

Camera-ready copy (CRC)
CRCs can be in two forms: paper or electronic. Paper CRC: material that has been composed, edited, illustrated, and is ready for entry into the printing system. Electronic CRC: the computer version of this material provided via a disk, internet, or other electronic media.

Campus Area Network (CAN). A CAN generally covers a smaller geographic area, i.e.., installation, than a WAN. A CAN transports data throughout an installation. This network connects LANs and provides data interface and network management interface to the LANs.

Capstone publications
Describe the applicable warfighting principles, regardless of the type of operations or the echelon. These publications focus on general principles. For ***example***, a principle of training is to "train as you fight" and a principle of combat is to "concentrate combat power at the decisive place and time." Leaders and soldiers read these publications to gain insight into the principles underlying the concepts for training and executing operations. They provide the foundation for all subordinate doctrinal and training publications

Career management field (CMF)
A grouping of related military occupational specialties that provides visible and logical progression of a soldier's career to grade SGM.

Cascaded Equipment.
Equipment or systems currently in the Army inventory that are to be redistributed within a MACOM, or between MACOMs, as a result of the Army modernization process.

Certification
Written verification of proficiency in a given task or tasks.

Certified Instructor
An instructor who received written certification of proficiency by the Instructor Certification Board as meeting all the requirements to instruct in a specific course. Certification normally requires: (1) Training as an instructor (through graduation from a TRADOC-approved Instructor Training Course) and eligibility to hold the instructor identifier, (2) Training in small group instruction for those assigned responsibility to facilitate small group instruction, (3) Demonstrating performance ability in course content (including being MOS/specialty qualified) or being a graduate of the course, (4) Demonstrating teaching or facilitating competence in the course the instructor will conduct.

Chaining
A training technique that uses or transforms a learned response into the stimulus for the next desired response, which then becomes the stimulus for the next response and so on to the final desired response. It is sometimes used when constructing a test that requires the student to use an answer from an already completed test question in order to arrive at the answer of a different test question. This situation should normally be avoided in testing because missing the initial question can result in missing all other chained questions.

Checklist
- **Job aid:** Used to determine or ensure a process or procedure is followed. The elements of the activity are listed in the execution sequence. A check is usually placed beside each element as it is accomplished.
- **Test:** A list of actions that identify critical actions that must be performed and that can be objectively observed and measured to determine student performance of the objective to the prescribed standard; the sequence of performance, if any; and an identification of which steps absolutely must be accomplished, if any. The actions are measured in the form of GO or NO GO. This is an absolute measure - the performer either performed or did not perform the action described in the learning objective, met or did not meet the performance criteria.

Check-on-Learning
An informal, required, check to determine if students are learning the lesson content. It can be as simple as asking one or two review questions or as complex as asking students to demonstrate skill performance. Quizzes, practical exercises, and check questions are "check-on-learning" examples.

Class frequency
The number of times a class is conducted during a fiscal year.

Classroom XXI
The training environment in which the soldier of the 21st Century will train. This environment is built by leveraging the technology of the information age to gain training efficiencies while maximizing training effectiveness. While successful implementation of Classroom XXI is dependent on the success of all Warriors XXI initiatives, it also requires technological modernization of the training institution.

Class schedule
Documentation of start and end dates for one iteration of a course.

Class size
The number of students in a class.

Class training schedule
The schedule of lessons and events for a class attending a resident course. The class training schedule must reflect mandatory lesson sequence established during course design.

Clustering
A process of organizing many tasks or learning objectives into logical groups based on some criteria. Also pertains to grouping objectives together within a course of instruction.

Continued on next page

Cognitive learning
A domain of learning that is concerned with knowledge and the various mental activities and processes by which the learner acquires knowledge and mental skills.

Cohesion
In units, the bonding together of soldiers with their leaders in such a way as to sustain their will and commitment to each other, their unit, and the missions.

Collective task
See "Task."

Collective training
Training, either in institutions or units, that prepares cohesive teams and units to accomplish their missions in the full continuum of military operations.

College Level Examination Program (CLEP)
A series of tests designed to evaluate knowledge gained in nontraditional ways. The College Level Examination Program general examinations test for knowledge which is usually acquired in the first two years of college. The College Level Examination Program subject examinations are comparable to end-of-course examinations and are used to grant exemption from or credit for specific courses.

Collocated school or course
A school or course that is used by one or more services on another service's installation and shares classroom facilities and equipment. Training policies, directives, and materials will be determined by mutual agreement between the services.

Combat developer
An individual or agency responsible for developing concepts and organizational and equipment requirements.

Combat drill
A collective task done at platoon level and below that is critical to the unit's success in combat.

Combat range complex
A group of multipurpose firing ranges.

Combat readiness
A unit's ability to perform in combat. Includes the status of personnel, logistics, morale, and training.

Combat Training Center (CTC) Program
An Army program established to provide realistic joint service and combined arms training in accordance with Army doctrine. It is designed to provide training units opportunities to increase collective proficiency on the most realistic battlefield available during peacetime. The four components of the CTC Program are --

- The National Training Center
- The Combat Maneuver Training Center
- The Joint Readiness Training Center
- The Battle Command Training Program

Combined arms integration
The process of ensuring that lower level's training strategies support the next higher level's training strategies (i.e. battalion supports brigade) and maneuver training strategies are supported by other unit strategies.

Combined arms live fire exercise
High-cost, resource-intensive exercises in which player units move or maneuver and employ organic and supporting weapons systems using full service ammunition with attendant integration of all combat, CS, and CSS functions.

Combined arms publications
The third level of the Doctrinal Literature publication hierarchy. They describe tactics and techniques of combined arms forces. These publications focus on sequencing, synchronizing, and coordinating varied capabilities to successfully execute assigned operations. Leaders and soldiers look to combined arms publications for information on the integrated application of varied military forces to execute combat operations.

Combined arms training
Training which focuses on the integration of combat, combat support, and combat service support elements to produce units capable of mission accomplishment on the battlefield.

Combined Arms Training Strategy (CATS)
The Combined Arms Training Strategy (CATS) is the Army's overarching strategy for the current and future training of the force. These training strategies --

- Describe how the Army will train the total force to standard.
- Consist of unit, individual, and self-development training strategies.
- Identifies, quantifies, and justifies the training resources required to execute the training.

Combined training exercise
A training exercise that is conducted by military forces of more than one nation. Sometimes called "multinational training."

Command Field Exercise (CFX)
A FTX with reduced unit and vehicle density but with full C2, CS, and CSS elements (e.g., the platoon leader in his vehicle represents the entire platoon). CFXs are excellent vehicles for training leaders and staff with full command, control, communications, and logistical systems. (FM 25-101) See "Exercise."

Command operating budget (COB)
The budget for the current year, budget year, and contains needed outyear data.

Command Post Exercise (CPX)
An expanded MAPEX for staff and all commanders to lead and control tactical operations by using tactical communications systems. Often the CPX is driven by a simulation or is part of a larger exercise. (FM 25-101) See "Exercise."

Commandant's Time
Administrative time included in a Program of Instruction to provide additional training , to correct training deficiencies, or provide time for other requirements.

Commander's training assessment
An assessment of a unit's current mission essential task list (METL) proficiency focusing on training deficiencies that impact on the unit's ability to perform its wartime mission (or to accomplish military operations). (FM 25-101)

Common core training
Directed training requirements for specific courses, grade/skill levels, or organizational levels. It consists of tasks performed by individuals at specific grade levels, regardless of military occupational specialty (MOS) or career field. Common core includes primarily organizational level tasks and may include some common soldier and common skill level tasks. The result is soldiers, leaders, and civilians who are prepared to perform new and more complex leadership related duties in operational units and organizations.

Common skill level task
See "Task: Individual critical task."

Common soldier task
See "Task: Individual critical task."

Common task management
The umbrella process used to manage needs analysis, job and task analysis, and development of training products for common tasks: common core, common soldier, common skill level and common organizational level tasks. It ensures the identification of common critical tasks as well as horizontal and vertical alignment of these tasks resulting in progressive, sequential, and standardized training. Many common tasks become part of common core training.

Common Task Test (CTT)
A formal hands-on test administered by the unit that measures a soldier's proficiency on common critical tasks from the soldiers manual of common tasks.

Continued on next page

Competency
Ability to perform tasks and supporting skills and knowledge to the required standard.

Computer-aided instruction (CAI)
A type of IMI. Computer-aided instruction (CAI), also referred to as "computer-assisted instruction," involves use of computers to aid in the delivery of instruction. CAI exploits computer technology to provide for the storage and retrieval of information for both the instructor and student. CAI usually refers to the use of computers to support instructor-led classroom instruction. Using computers as a presentation media for slides, audio, or motion pictures which support large or small group instruction is an example of CAI.

Computer-assisted survey (CAS)
A survey administered in various ADP media (e.g., floppy disk) or electronic media (e.g., e-mail) designed to collect detailed military personnel and training information from respondents. Uses stand-alone computers, the internet, and/or other electronic networks.

Computer-based instruction (CBI)
A type of IMI. CBI usually refers to course materials presented or controlled by a computer and which use multiple requirements for student responses as a primary means of facilitating learning.

Computer-based training (CBT)
A type of IMI. CBT usually refers to course materials presented or controlled by a computer and which use multiple requirements for student responses as a primary means of facilitating mastery of a skill or task.

Computer-managed instruction (CMI)
A type of IMI. CMI involves the use of computers and software to manage the instructional process. Functions of CMI can include a management administration system designed to track student performance over time, provide information concerning performance trends, record individual and group performance data, schedule training, and provide support for other training management functions. CMI functions may be used with CBT,CBI, CAI, or IMI based on need.

Computer supported instruction (CSI)
A sub-set of computer based instruction. Computers used to develop or enhance classroom training, e.g., conducting task analysis with a database, creating Vu-graphs, projecting computer images while conducting a conference type lesson.

Condition
- **Learning objective condition**
  The learning objective condition describes the training situation or environment under which the student must perform the learning action statement. It includes any pertinent influence on learning objective performance, including identification of materials, facilities, and equipment the student must have to perform the objective.
- **Task condition**
  The task condition describes the **field conditions** under which the task will be performed. The condition expands on the information in the task title by identifying when, where, and why the soldier performs the task and what materials, personnel, and equipment the soldier must have to perform the task.
- **Special condition**
  A performance condition which occasionally occurs and affects soldier ability to perform the critical task to the established standard. These special conditions include, but are not limited to, wearing of MOPP4, NVD, or SCUBA when performing the task.

Conference
A method of instruction that develops the training material through an instructor-guided student discussion.

Confirmation
The knowledge of results provided students as they learn. The principal underlying confirmation is reinforcement or rewarding of student achievement.

Consequences of inadequate performance
A criterion in selecting critical tasks. The consequences of inadequate performance on certain tasks could result in injury to personnel, loss of life, or damage to equipment.

Consolidated ACCP
That part of the Army Correspondence Course Program which is administered by the Army Institute for Professional Development, consisting of distance learning courseware developed by TRADOC, DA, and DoD schools and agencies as described in DA Pam 351-20, The Army Correspondence Course Program (ACCP) Catalog, Chapters 2, 3, and 5.

Consolidated Course
An ITRO consolidated course consists of a curriculum developed by two or more services. The course faculty is normally multi-service. The curriculum may be common throughout or consist of a common core plus Service-unique tracks.

Constraints
Limiting or restraining conditions or factors such as policy considerations, time limitations, environmental factors, and budgetary and other resource limitations.

Constructed response
An answer requiring recall or completion as opposed to recognition (e.g., drawing a diagram, filling in a form, and labeling the parts of a piece of equipment).

Constructive M&S
Models, Simulators and/or Simulations that involve real people making inputs into an M&S entity that carries out those inputs by simulated personnel operating simulated systems (e.g., Battle Command Training Program (BCTP) Warfighter Exercise [WFX]).

Constructive Training
The use of computer modes and simulations to exercise the command and staff functions of units from platoons through echelons above corps.

Content Validity
Tests are intended to measure the extent to which students learn the content of the instruction and the extent to which students learn the content of the job. The extent to which the test measures this intent is referred to as content validity. If a test has content validity, it will answer the question: "Did the student learn the content of the instruction/the job?"

Contract
A promise or set of promises for the breach of which the law gives a remedy or the performance of which the law in some way recognizes as a duty. Its necessary elements are an offer, acceptance, and consideration.

Correspondence course
A formal, centrally managed, series of self-study , self-paced instructional material prepared by TRADOC Training/TD (Task) Proponents; identified by a course title and course number; and administered to nonresident students. A course may include phases, but usually consists of subcourses presented in a logical, progressively sequenced, and directed toward specific learning objectives. See "Army's Correspondence Course Program (ACCP)."

Correspondence subcourse
The basic element of an Army correspondence course. A subcourse is a self-paced, self-contained module of nonresident instruction consisting of one or more lessons that teach a part of a critical individual task, a single critical task, or a group of related tasks. It includes a practice exercise with feedback for each lesson and an end-of-subcourse test. The subcourse may contain material extracted from Armed Forces publications or other adjunctive materials to support the training. See "Module."

Continued on next page

Cost and training effectiveness analysis (CTEA)
An analysis which compares costs and effectiveness among training alternatives in support of a cost and operational effectiveness analysis. In addition, the cost and training effectiveness analysis is used to support development of systems training devices.

Cost-effectiveness analysis
An analysis which compares costs and effectiveness among alternatives (actions, methods, approaches, equipment, weapon systems, support systems, force combinations, and the like) to accomplish a specific mission or objective.

Counseling
A means of assisting and developing students and subordinates. A leader/instructor counsels subordinates: to praise and reward good performance, to develop teamwork, to inform soldiers on how well or how poorly they are performing, to assist soldiers to reach required standards, to cause soldiers to set personal and professional goals, and to help soldiers resolve personal problems.

Counter
To act in opposition to; nullify.

Course
A complete series of instructional units (phases, modules and lessons) identified by a common title or number. It trains critical tasks required for qualification of a specific job. See "Job (or duty position)."

Course Accreditation
Certifies that instruction is conducted IAW proponent guidance and that students graduating from the course are trained to the same standard as students graduating from the same course taught at the proponent service school. Only a subject matter expert (SME) designated by the respective proponent service school is authorized to evaluate and recommend accreditation of a course. Additionally, a course cannot be accredited unless the institution is accredited.

Course administrative data (CAD)
A resident course document that provides critical planning information used to determine student input requirements for new and revised courses.

Course Development Plan
See "TD Project Management Plan."

Course documentation
Consists of the documents that show the current content of a course (instructional materials, tests, student evaluation plan, etc,) and its developmental history (job analysis, task performance specifications, training strategy, course design, etc.).

Course Management Plan (CMP)
A document which tells the course manager and instructors how to manage the course. It is part of a training course training support package (TSP).

Course map
A chart that depicts the designed sequence of presentation for a given course established during course design.

Course proponent
See "Training proponent."

Course start date
Latest start date for implementing a course.

Courseware
An actual instructional package (including content and technique) loaded in a computer, training device, or other instructional delivery system.

Covert behavior
Behavior that is not directly observable but may be inferred from overt behavior, which is observable.

Credit hour
The measured unit of distance learning course work. The number of credit hours assigned to a module is the estimated time required for an average student to complete the material.

Crew Drill
See "Drill."

Criterion
The standard by which something is measured. In Army training the task or learning objective standard is the measure of soldier/student performance. In test validation, it is the standard against which test instruments are correlated to indicate the accuracy with which they predict human performance in some specific area. In evaluation it is the measure used to determine the adequacy of a product, process, or behavior.

Criterion behavior
Performance required of a student described by the learning objective(s) and measured by the criterion test.

Criterion-referenced grading
A way of grading students in relation to a predetermined standard (go or no-go). The standard is based on job requirements.

Criterion-referenced instruction (CRI)
The instruction aimed at training students to perform established learning objectives (performance criteria) to the prescribed standard. CRI is the selected instructional methodology for training within the Army.

Criterion-referenced test
A test that establishes whether or not a unit or soldier performs the learning objective to the established standard. Performance is measured as a "go" or "no-go" against a prescribed criterion or set of criteria - the learning objective standard. It is scored based upon absolute standards, such as job competency, rather than upon relative standards, such as class standings.

Critical collective task.
See "Task: Collective task."

Critical individual task
See "Task: Individual task."

Critical task
See "Task: Critical collective task," and "Task: Critical individual task."

Critical task selection board
A management device which serves a quality control function in critical task selection. The board reviews the total task inventory and job performance data and recommends tasks for approval to the appropriate authority as critical tasks.

Critical Training Gates
Training events that soldiers and units must perform to standard prior to performing subsequent tasks or events.

Cross training
The systematic training of soldiers on tasks related to another duty position.

Cue
A word, situation, or other signal for action. An initiating cue is a signal to begin performing a task or task performance step. An internal cue is a signal to go from one element of a task to another. A terminating cue indicates task completion.

Cueing
Describes a deficiency in a test question where the correct answer can be found or implied from the information found elsewhere in the test.

Curriculum
A course of study. An Army school curriculum consists of the course design, lesson plans, student evaluation plan, tests, course map, all other associated training material, and the Program of Instruction.

Continued on next page

D

Data item description (DID)
A completed DD Form 1664 that defines the data required of a contractor. The form specifically defines the content, preparation instructions, format, and intended use of the data. Data is information inherently developed during completion of work tasks in the Statement of Work (SOW) and required for retention. DIDs **do not** prescribe work tasks or performance methods. After the proponent determines the need for delivery of data resulting from a work task, the preparer of the SOW should select the appropriate DIDs. DoD 5010.12.L, the DoD Acquisition Management Systems Data Requirements Control List (AMSDL), lists all published DIDs.

Decay rate
The rate at which an individual loses the ability to perform a task or supporting knowledge and skills.

Decision logic chart and table
A guide used to assist in the decision-making process. It represents the input or set of inputs likely to occur for a given situation, and recommends a course of action or, if appropriate, alternative actions. It is also called a decision table.

Decision table
See "Decision logic chart and table."

Decision tree
Graphic representation of the decision-making sequence of a specific activity or operation.

Defense school or course
A school or course used by two or more services or agencies and administered by a service or agency designated as the executive agency. The curriculum is developed under the policy guidance and the approval authority of an element of the Office of the Secretary of Defense.

Delivery Order/Task Order
An order issued against an established contract where the terms, conditions, and unit prices are already set. A Delivery Order is the entry document into an already existing contractual mechanism that clearly and completely defines the government requirement. It is the firm basis upon which the contractor can determine the nature, extent, and quality of the work required.

Demonstration
A method of instruction by which an instructor shows the students how to perform a process or procedure.

Department of the Army Visual Information Production and Distribution Program
A program that identifies all Headquarters, Department of the Army, approved development of visual information products.

Deployable training
Deployable training is a DL application using technology to take training and education to soldiers involved in various missions around the world. The instruction is supported by deployable training support packages (TSPs) that contain the student and instructor materials required to present the instruction.

Deployed Training
A package of training products which may include training devices, simulation, simulators, hardware, ranges, ammunition, distributed institutional training, or battle-rostered observers/controllers for use by deployed units. The training ensures unit and soldier ability to perform mission essential critical tasks as well as mission planning and rehearsal support, reconstitution of units, and continuation of professional development.

Design
A major phase in the Systems Approach to Training (SAT) Process. Determines how to train. Translates analysis data into a blueprint for training. It identifies all resource requirements, training structure, learning objectives, training sequence, student evaluation/graduation requirements, program of instruction.

Development
A major phase in the Systems Approach to Training (SAT) Process. Converts the design into resident and nonresident training materials, e.g., lesson plans, student handouts, media, etc.

Diagnostic test.
See "Pretest."

Difficulty-importance-frequency model
One of several models available for use in selecting tasks for training and training site. Using this model, the proponent identifies those tasks as critical based on the difficulty, importance, and frequency of job task performance.

Digitization
The overarching term for the electronic recording of information for distribution via internet (on-line access), computer networks, computer disks (floppies, CD-ROMs), magnetic tapes, optical disks, satellite transmission, and bulletin boards. Digitization may be used for doctrine, training, leader development, organization, materials, and soldier (DTLOMS) purposes.

Digitized Training
The digitization of training includes the development, implementation/delivery, distribution, and management of training primarily through electronic means. It provides the capability to train soldiers and units throughout the training environment. Examples include the presentation of training through computer-based instruction (CBI), to include simulations and embedded training; the Standard Army Training System (SATS), the Automated Systems Approach to Training (ASAT); etc.

Directed requirement
A materiel requirement approved by DCSOPS (DAMO-FD) to meet an urgent need for a materiel system or item of TADSS not documented in an Operational Requirements Document (ORD). Directed requirements approved by DAMO-FD should provide direct supplemental funding from at least DA level, not "out of hide" funding from the Program Managers (PMs).

Directed training
Any training dictated by a higher headquarters. Common Core Training is directed training.

Discrimination
The act of distinguishing between performers and non-performers.

Distance Learning
The delivery of standardized individual, collective, and self-development training to soldiers and units at the right place and right time through the application of multiple means and technologies. DL may involve both synchronous and asynchronous student-instructor interaction. It may also involve self-paced instruction without benefit of access to an instructor.

Distance learning technology
Technology used for implementation of DL which --
- Makes it easier for the training designer to provide structured and sequenced training.
- Provides a framework within which the student can most efficiently apply his/her personal learning capabilities to master the required training.

Distracter
In testing, incorrect answers to multiple choice or matching type test items.

Distribution plan
A comprehensive list of organizations, activities, and/or units that are scheduled to receive an item of TADSS, less training ammo/munitions, to include the date that the item will be delivered.

Doctrinal literature
The fundamental principles of doctrine, together with the tactics, techniques, and procedures to implement the doctrinal principles and win on the battlefield. Army doctrinal literature is published in FMs.

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Doctrinal Literature Master Plan (DLMP)
A TRADOC regulation that establishes policy and assigns responsibility for writing, coordinating, reviewing, and approving doctrinal literature. It focuses on Army doctrine and the supporting tactics, techniques, and procedures used on the battlefield. However, it also addresses joint doctrine and joint tactics, techniques, and procedures and combined doctrine for which TRADOC is responsible. It includes a doctrinal literature listing of all Army, multiservice, joint, and combined doctrinal publications for future development. It provides a plan for prioritizing doctrinal literature work.

Doctrine
Fundamental principles by which the military forces or elements thereof guide their actions in support of national objectives. It is authoritative but requires judgment in application.

Doctrine and Tactics Training (DTT)
Training conducted on equipment, inter-operability, and management of new or cascaded equipment, considering comparison of new to older equipment, and associated threats.

Downlink
A teletraining site that only receives training. The student can see the instructor, but the instructor cannot see the students. The teletraining network is capable of only one-way video over satellite. See "Uplink."

Drill
A disciplined, repetitious exercise to teach and perfect a skill or procedure (action), i.e., a collective task or task step. Drills are published in MTPs and drill books. There are two types:

- **Battle drill**.
  A critical collective action (or task) performed by a platoon or smaller element without the application of a deliberate decision making process, initiated on cue, accomplished with minimal leader orders, and performed to standard throughout like units in the Army. The action is vital to success in combat or critical to preserving life. It usually involves fire or maneuver. The drill is initiated on a cue, such as an enemy action or a leader's brief order, and is a trained response to the given stimulus.
- **Crew Drill**
  A critical collective action (or task) performed by a crew of a weapon or piece of equipment to use the weapon or equipment successfully in combat or to preserve life, initiated on cue, accomplished with minimal leader orders, and performed to standard throughout like units in the Army. This action is a trained response to a given stimulus, such as an enemy action, a leader's brief order, or the status of the weapon or equipment.

Drill Book
A separate document (or appendix in a Mission Training Plan) developed for squads and platoons (or equivalent units) to provide a limited number of DA standard methods (battle drills) for executing selected critical collective tasks or task steps.

E

Electronic Guide
A type of electronic publication that provides information, instruction, or help.

Electronic Performance Support System (EPSS)
An integrated electronic environment that is available to and easily accessible by each user and is structured to provide immediate, individualized access to the full range of information, software, guidance, advice and assistance, data, images, tools, as well as assessment and monitoring systems to permit performance with minimal support and intervention by others. EPSS can also be considered a type of job performance aid.

Electronic publication
A document prepared in a digital form on a suitable medium for electronic-window display to an end user. Two examples of electronic publications are electronic guides and Interactive Electronic Technical Manuals (IETMs).

Electronic testing
A general term encompassing all methods for applying computers in the assessment of human attributes, knowledge, and skills. Sophisticated forms of computer-based testing adapt the sequence, content, number, or difficulty of test items to the responses of the person being tested. As the individual is being tested, the computer presents test item's in response to the individual's actions. The electronic testing method utilizes branching to select test items based on the answers given while the test is being administered.

Embedded training
Training that is provided by capabilities designed to be built into or added onto operational systems to enhance and maintain the skill proficiency necessary to operate and maintain that equipment end item.

Employment procedures and soldier publications
The fifth level of the Doctrinal Literature publication hierarchy. These address soldiers' duties and specific systems. Doctrinal and training publications in this category address specific MOS, officer career fields, duty positions, and systems. For ***example***, doctrinal or training publications pertaining to the employment of a Patriot Air Defense System are in this category. In addition, any doctrine or training publication specific to the performance of an occupational specialty or duty position is in this category. Doctrinal publications may also describe a specific system's operation, employment, and maintenance. However, detailed maintenance procedures are published in technical manuals by the materiel developer. Training publications in this category focus on tasks, conditions, and standards performed by individuals. Doctrinal and training publications in this category consist primarily of techniques and procedures.

Emulator
Software or hardware that allows one computer to perform the functions of or execute the programs designed for another type of computer or computing system.

Enabling learning objective (ELO)
A learning objective that supports the terminal learning objective. It must be learned or accomplished to learn or accomplish the terminal learning objective. It consists of an action, condition, and standard. Enabling objectives are identified when designing the lesson. A terminal learning objective does not have to have enabling objectives, but it may have more than one.

Enabling skills and knowledge
Those skills and knowledge required for the performance of a task performance step. They are identified when conducting task analysis.

End-of-Course Test
A test designed to evaluate students accomplishment of all learning objectives presented in the course.

End-state Standard
A statement that identifies the unit's personnel, equipment, or readiness status at the completion of a mission or collective task performance.

English-as-a-second-language
Education center program to provide English language instruction to soldiers whose primary language is other than English. Eligibility for instruction is determined through commander's referrals and testing.

Entry level training
Training given on initial entry into the Army which provides an orderly transition from civilian to military life. For enlisted soldiers it includes traditional basic combat training, advanced individual training, one station unit training, or other individual training needed to prepare them for initial duty assignments. Officer entry level training includes MQS I and MQS II (officer basic courses) to prepare them for their first duty assignment.
Note: MQS products will be phased out upon replacement by OFS products.

Continued on next page

Entry skills
Specific measurable behaviors determined to be basic to learning material presented in the course.

Entry skills test
A pre-test designed to determine if a student already possesses a certain skill or knowledge needed as a prerequisite before undertaking new instruction.

Entry test
A test which contains items based on the objectives that the intended students must have mastered in order to begin the course. ***Note:*** The distinction between entry test and entry skill test.

Environmental considerations.
The environmental protection factors, concerns, and regulations that must be identified when conducting task analysis and taken into account when designing training and/or implementing training.

Estimated time value (ETV)
Estimated manpower hours needed to perform a training development process or develop a product; based on organizational functions measured in the 1983 TRADOC TD Manpower Staffing Standards System (MS-3) study.

Evaluation
- The cornerstone of quality training.
- One of the five phases of the Army's TD process, i.e., the Systems Approach to Training (SAT). As such, it is a dynamic process that can occur as formal internal and external evaluations or informal feedback between the student and instructor as well as between the field commander or combat training center (CTC) and the proponent school.
- Seven major functional areas:
  - SAT process.
  - Individual Training and Education Process/Program.
  - Products.
  - Personnel.
  - Training Institutions/facilities
  - Needs Assessment.
  - Unit Training

Executive Agent
An organization or member of an organization assigned sole responsibility and delegated authority for specific actions otherwise exercised by a higher level organization or executive.

Exercise
Collective task training designed to develop proficiency and crew teamwork in performing tasks to established standards. Exercises also provide practice for performing supporting critical individual (leader and soldier) tasks. Exercises may be conducted in units or during resident training. Types of exercises are as follows:
- Command Field Exercise (CFX)
- Command Post Exercise (CPX)
- Field Training Exercise (FTX)
- Lane Training Exercise (LTX)
- Live Fire Exercise (LFX)
- Situational Training Exercise (STX)

Extension course
A course developed by a service school as part of the individual training plan but conducted in locations other than United States Army Training and Doctrine Command service schools or Army training centers.

Extension training
Individual or collective training which is structured, developed, and supported by the service schools, but normally conducted in other than institutionalized settings.

Extension training materials
Refers to all training products sent by the proponent. This includes Training Extension Course, Army Correspondence Course Program, training devices, simulators, and resident materials sent to units.

F

Facilitator
Person responsible for keeping the meeting focused and moving. Military small group instruction facilitators may or may not be subject matter experts and may instruct, lead, and/or facilitate a group to a predetermined standard. The facilitator's function includes stimulating group interaction, assisting group functioning, and expanding group participation and development.

Familiarization training
Orientation on a task or group of tasks as a substitute for training. Technically information dissemination; not training.

Feedback
Information and data, provided both within and outside the training system, that indicates the efficiency or effectiveness of the system or product. It is the data and information provided to the appropriate training proponent concerning the effectiveness and efficiency of the proponents training products, Also information provided to a student concerning his/her training performance.

Fidelity
- In job performance measurement, the extent to which an objective (action, conditions, and standard) approximates those of a task.
- In training devices or simulators, the accuracy with which simulators reflect that which they simulate.

Fielding date
The date that equipment, training materials, or other support are required to be in the field to support training requirements.

Field Manual (FM)
A DA publication that contains doctrine that prescribes how the Army and its organizations function on the battlefield in terms of missions, organizations, personnel, and equipment. The level of detail should facilitate an understanding of "what" and "how" commanders and staffs execute their missions and tasks. FMs may also contain informational or reverence material relative to conducting military operations and training.

Field survey
A school- or agency-prepared and administered survey (but not an occupational survey under AR 611-3) conducted to collect task performance data to identify critical tasks. When the survey is intercommand, it must be approved by the U.S. Total Army Personnel Command.

Field test
A tryout of any training course on a representative sample of the target population to gather data on the effectiveness of instruction in regard to error rates, criterion test performance, and time to complete the course.

Field testing
The presentation of one course iteration to determine the ability of the RCTI to present the instruction as designed and the success of the students in mastering the objectives in the RC environment.

Field training
Technical, operator, or other training conducted at operational locations on specific systems and associated direct support equipment.

Field Training Exercise (FTX)
Conducted under simulated combat conditions in the field. FTXs fully integrate the total force in a realistic combat environment. They involve combat arms, CS, and CSS units. FTXs encompass such training as battle drills, crew drills, and STXs to reinforce soldier and collective training integration. They are used to train the commander, staff, subordinate units, and slice elements. (FM 25-101) See "Exercise."

Firm-Fixed Price
A firm-fixed price contract provides for a price that is not subject to any adjustments on the basis of the contractor's cost or experience in performing the contract. Maximum risk and responsibility for all costs and resulting profit or loss is placed on the contractor.

First unit equipped (FUE)
This is the date the first user unit receives a new system.

Flowchart
A graphic representation of the sequence of a specific activity, operation, or algorithm.

Flow diagram
In training development, a graphic representation of actions or events required to accomplish a task. It is frequently accompanied by a narrative description. The flow diagram provides specific instructions and precise sequencing for accomplishing tasks and goals. In contracts, a flow diagram visually depicts the actions or events required of each participant involved in developing extension training materials. It is frequently accompanied by a narrative description and provides instructions and sequencing for extension training material developers.

FOOTPRINT
The manpower, personnel, and training (MTP) relational database that supports MANPRINT.
- It is used as an analysis tool, i.e., to develop an MOS MTP profile which can be used in developing a target audience description.
- Future enhancements to the database will include active, reserve, and national guard data, ODARS critical task data, proponent critical task database, and commissioned and warrant officer and civilian personnel data.

Foreign disclosure
The conveying of classified military information (CMI) and controlled unclassified information (CUI) through oral or visual means to an authorized representative of a foreign government.

Foreign Disclosure Officer (FDO)
Department of the Army (DA) member designated in writing to oversee and control coordination of specific disclosures of CMI and CUI. FDOs are authorized for appointment to lowest command level that is the proponent for Army-created, developed, or derived CMI and CUI.

Foreign training
The training of foreign nationals under the provisions of the Foreign Assistance Act of 1961, as amended. This training is also called the Military Assistance Program. It is funded through grants or foreign military sales. It includes resident training, on-the-job training, mobile training team, field training services, and in-country training.

Formal training
Training in an officially designated course conducted or administered according to an appropriate course outline and training program and appropriate training objectives. The course may be resident or nonresident.

Frequency of performance
A statistical rating collected when conducting a job analysis survey that indicates how often a task is performed.

Functional area
A branch of service governed by a TRADOC proponent school (Armor, Infantry, Signal, Intelligence, Field Artillery, etc.).

Functional course
A course designed to train soldiers to perform the critical tasks and supporting skills and knowledge required to perform the specialty or functional job. It may provide training which qualifies soldiers for award of an additional skill identifier, special qualifications identifier, or skill identifier.

Functional Standing Committees (FSC)
The FSCs are established under SBT Management to provide ongoing training management for maximum efficiency and quality. Participating members include Functional Chiefs Representatives (FCR) of civilian career programs, functional and personnel proponents, SB Training Providers, selected MACOM and DOD representatives, and Subject Matter Experts who make decisions in regard to the training needs of the customer.

G

Gate
A performance requirement that must be satisfied to continue training.

Generic tasks
A task that is very broad in scope (e.g., Repair an Engine). It is really a summary of individual tasks which share some, but not all of the same task performance specifications. Skills, knowledge, safety hazards, environmental factors, and performance steps can not be adequately identified for a generic task. TRADOC training proponents will not develop or use generic tasks.

Generic training
This is the training of skills and knowledge that support a number of individual critical tasks, e.g., tracing an electric circuit is a shill that supports a number of critical tasks. These skills and knowledge were identified during the task analyses of approved critical tasks.

GO/NO-GO - pass or fail
This is an absolute measure: the performer either performed or did not perform the action described in the learning objective, met or did not meet the performance criteria. The performer cannot partially pass. The performer either passes (meets the standard and receives a "GO") or fails (does not meet the standard and receives a "NO-GO").

Government Furnished Information (GFI)
GFI lists and describes data and information in the possession of or acquired by the Government and made available to the contractor. For training development contracts, proponents will most commonly provide the contractor with GFI in the form of outputs from the in-house performance of previous SAT phases. For example, if a proponent decides to contract out the development of a training course, the proponent would provide the contractor with the analysis and design data as critical inputs to the development phase.

Government Furnished Property (GFP)
GFP lists and describes property in the possession of or acquired by the Government and made available to the contractor. Types of GFP include facilities, utilities, equipment, and materials.

Graphic Training Aid (GTA)
A Graphic Training Aid (GTA) provides a means for trainers to conduct and sustain task-based training in lieu of using extensive printed material or an expensive piece of equipment. The uses of GTAs range from quick reference memory aids to simulation games for a battalion.

Group-paced training
A mode of instruction where soldiers move through a course as a group as they accomplish milestones together. Often the rapid learners may assist slower ones so that they all finish at the same time.

Group trial
The tryout of a training course on a representative sample of the target population. It is used to gather data on the effectiveness of instruction based on error rates, criterion test performance, and time to complete the course. See "Field test."

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H

Hands-on
Student practice of training on actual equipment, simulators, and training aids.

Hands-on performance test
Performance test that requires students to prove competency by using actual equipment, materials, simulators/simulations, or training aids to perform the required learning objective. Performance tests include written tests that require the student to write in the performance of the job task, e.g., complete a form; compute.

Hard data
Data acquired through precise and accurate measurement.

HARDMAN
Acronym for a six-step analytical model that estimates the projected manpower, personnel, and training requirements of a baseline comparison or "notional" system design. This analysis is generally conducted prior to milestone I of the acquisition process during the Concept Exploration and Definition phase of the life cycle. The acronym is for hardware versus manpower methodology.

Hazard.
Any actual or potential condition that can cause injury, illness, or death of personnel; damage to or loss of equipment (or) property; or mission degradation. (FM 101-5-1)

Hazard Communication (HAZCOM)
The requirement to inform personnel occupationally exposed to hazardous materials of the potential hazards and their training to prevent chemically related occupational illness and injuries.

Heuristic
The solution of a problem identified by trial and error, evaluating each step towards a final result.

High Level Architecture (HLA)
Department of Defense-directed standards for M&S, compliant with the Defense Information Infrastructure Common Operating Environment (COE) and Direct Data Link Interconnectivity (DDLI). It prescribes certain functional elements, data interchange formats, and ability to use common communications service. HLA enables interoperation between compliant M&S- and COE-compliant C4ISR systems.

Holdover
Soldier status referring to those graduates detained at the end of a course for causes such as lack of orders, lack of clearance, medical problems, or judicial proceedings.

Home assignment sheet
A document that describes the assignments the student must do outside of the normal resident training time. It can be a simple reading assignment, some kind of worksheet, or even a practical assignment where the student must produce a product. Home assignments are subject to testing.

Horizontal alignment of tasks
The identification of critical individual tasks that are performed by different ranks serving in the same organization level, e.g., The platoon Sergeant and the lieutenant in a platoon, the 1SG and the captain in a company.

Horizontal alignment of training
Training is horizontally aligned when tasks selected for training are relevant to duties, responsibilities, and missions assigned to soldiers at a specific organizational level, notwithstanding the rank or status of the individual being trained. For ***example***, an officer, warrant officer, or noncommissioned officer at a given organizational level may primarily perform the task, but other leaders require the same skills and knowledge to assist or supervise task performance.

I

Immediacy of performance
A statistical rating (task performance data) collected when conducting a job analysis survey that indicates the time between job entry and job performance. A factor that may be used by the critical task selection board.

Implementation
The actual conduct of training by any method of instruction using the validated training materials created during the design and development phases. A major phase in the training development process.

Independent learning
Usually, learning outside the classroom environment. It is similar to learning from homework but should not be confused with individualized instruction.

Independent study
Typically, a special project or assignment of selected readings for students seeking more information on a course topic.

Individual task
See “Task.”

Individual task analysis
The process used to identify the individual task performance specifications. They describe how the task is actually performed, under what conditions it is performed, and how well the individual must perform it. They are the task performance details needed to establish the individual training strategy and to design and develop follow on training. See “Task performance specifications.”

Individual training
- Training which prepares the soldier to perform specified duties or tasks related to an assigned duty position or subsequent duty positions and skill level.
- “Training which officers and NCOs (leader training) or soldiers (soldier training) receive in schools, units, or by self study. This training prepares the individual to perform specified duties or tasks related to the assigned or next higher specialty code or skill level and duty position.” (AR 350-41)

Individual Training Plan (ITP)
A document prepared for each enlisted military occupational specialty, warrant officer military occupational specialty, commissioned officer specialty code, or separate functional training program that describes the overall plan to satisfy training requirements and document the long range training strategy

Individual training strategies
See “Training strategy.”

Individual trial
In lesson-effectiveness testing, the initial tryout of lesson material on soldiers representative of the target population.

Individualized instruction
Instruction that attends to the individual needs of and differences among students. Properly developed individualized instruction is characterized by attending to individual student's training objectives, allowing for individual start times, adjusting for individual entry skill levels, releasing of some time constraints, offering of a choice of learning media, and using criterion-referenced measures of mastery. Mandatory completion criteria including time must be established.

Information sheet
Provide information that is either not available to the student from any other source or presents the information in a much clearer and more condensed form.

Initial operational test and evaluation (IOTE)
Field testing, utilizing typical user personnel, to assess operational effectiveness and suitability **of** military materiel. This evaluation is completed prior to a decision to commit funds for full production. The tester conducts IOTE under realistic operational conditions during Engineering and Manufacturing Development. IOTE is the new name for operational test.

Institution Accreditation
Certifies that an institution's Training Support and Conduct of Training are adequate to train to course standards. It includes evaluation of all training being conducted to ensure training methodology, sequencing, and resources are IAW course requirements.

Instructional delivery system
A medium or combination of media (including personnel, equipment, and software) used to convey instruction to the student-

Instructional site
A physical location where specific instruction is to be accomplished (i.e., school, unit, job site). Despite semantic preferences, a recognition of basic distinction between form of training (self-study, supervised on-the-job training) and location of training (resident or job site) is important. In this context, site and setting are designations of training location, not training form. In analysis the analyst is concerned with site (location) selection, not training form selection which is the task of the designers and developers. See “Training site selection.”

Instructor
Any personnel, military or civilian, who conducts instruction.

Instructor and key personnel training (IKPT)
Training provided to instructors and key personnel to facilitate training development of new systems or equipment.

Instructor contact hour (ICH)
The manpower work load factor which represents one instructor work hour devoted to conducting training. The instructor contact hour for each lesson is related to optimum class size and computed by multiplying the number of academic hours times the number of student groups times the number of instructors required per group.

Instructor evaluation
A written evaluation report, provided by qualified observers of an instructor's teaching ability, knowledge, and skill.

Instructor training
The training of selected personnel in the techniques of teaching to qualify them as instructors.

Instrument
In testing and evaluation, a test or measuring device that is used to determine achievement (go/no-go) or the relative standing of an individual or group. Tests, rating forms, and standard interviews are all evaluation instruments.

Integrated logistics support (ILS)
A composite of all the support considerations necessary to ensure the effective and economical support of a system or item of equipment for its life cycle. The elements of integrated logistics support are design influence, maintenance, manpower and personnel, supply support, support equipment (including test, measurement, and diagnostic equipment), training and training devices, technical data, computer resources support, packaging handling and storage, transportation and transportability, facilities, and standardization and interoperability. (See JCS Pub 1).

Integrated Product and Process Team (IPPT)
A team that consists of stakeholders who collectively possess the required know-how and have the ability to control the resources necessary for getting the job done.

Integrated training
Training of a critical task **or supporting skills and knowledge.** It is integrated into existing course academic instruction (reflected in the POI) and applies to resident and non-resident instruction. It includes common or shared task TSPs forwarded to non-proponent schools for integration into an existing lesson. The task **MAY** be one in which the performer has received prior training, i.e., it is best used to sustain/refine previously acquired skills. It ---

- Must be applicable to the block of instruction in which it is integrated.
- Trains the task to standard.
- Evaluates task performance during instruction Evaluates task performance during instruction under conditions prescribed in common or shared task TSPs.

Intellectual property.
A product of the human mind which is protected by law. It includes, but is not limited to, patents, inventions, designs, copyrights, works of authorship, trademarks, service marks, technical data, trade secrets, computer software, unsolicited inventive proposals, and technical know-how. The intangible rights in such property are described as intellectual property rights." (AR 27-60)

Interactive courseware (ICW)
A type of IMI. Computer-controlled courseware that relies on trainee input to determine the pace, sequence, and content of training delivery using more than one type medium to convey the content of instruction. Interactive courseware can link a combination of media, to include but not be limited to programmed instruction, video tapes, slides, film, television, text, graphics, digital audio, animation, and up-to-full motion video to enhance the learning process.

Interactive Electronic Technical Manual (IETM)
A technical manual delivered electronically. IETM possesses the following characteristics: it can be presented either on a desktop or a portable device; the elements of data constituting the IETM are so interrelated that a user’s access to the information is achievable by a variety of paths; and it provides procedural guidance, navigational directions, and other technical information required by the user.

Interactive instruction
Student centered performance oriented training that requires students practice what they learn, receive immediate feedback, and be tested. The priority for interaction is between the student and the equipment/subject matter.

Interactive Multimedia Instruction (IMI)
IMI is a term applied to a group of predominantly interactive, electronically-delivered training and training support products. IMI products include instructional software and software management tools used in support of instructional programs. A hierarchical representation of IMI products is provided as follows:

- Interactive courseware (ICW)
- Electronic publications.
  - Electronic guides
  - Interactive electronic technical manuals
- Electronic testing
- Simulation
- Electronic management tools
  - Electronic performance support systems
  - Computer aided instruction (CAI)
  - Computer managed instruction (CMI)
  - Electronic job aids

(DoD Instruction 1322.20.)

Interactive Video Disc (IVD)
A type of IMI. An information storage and retrieval technology used with computers to support programs requiring a very large quantity of memory (e.g., long full motion video sequences or a very large library of complex graphics). IVD uses text, graphics, full motion video, and audio. It is always delivered on a videodisk-based system.

Interservice school or course
A school or course that presents a curriculum developed and approved by two or more military services to meet the specified training requirements of those services. The school or course is administered by the host service and the faculty may be multiservice.

Interservice Training Review Organization (ITRO)
Group whose major effort is directed toward improving the cost effectiveness of training through voluntary cooperative efforts among the services. Interservice Training Review Organization is guided and directed through a structure consisting of boards and committees superimposed on the formal organizational structures of the services concerned.

Invitation for Bid (IFB)
A solicitation document that clearly, accurately, and completely describes the requirement to be delivered and invites offerers to bid on that stated requirement.

Item analysis
The process of determining whether a test item is functioning as intended. Alternatively, the use of results on individual test items to determine effectiveness of the item. It can be used to obtain feedback on training deficiencies, score exceptions, and improve future versions of the test.

J

Job (or duty position)
A collection of unique, specific, related set of activities (tasks) performed by a unique, defined set of personnel**. For training development and training purposes**, it is an MOS by skill level; BC and AOC by rank; warrant officer MOS (Military Occupational Specialty) by skill level; ASI (Additional Skill Identifier); SQI (Skill Qualification Identifier); SI (Skill Identifier); LIC (Language Identifier Code); or other special category. Special categories include but are not limited to common tasks (for a specific skill level), additional duty assignments, and civilian jobs the Army is required to train.

Job aid
- A checklist, procedural guide, decision table, worksheet, algorithm, or other device used by a soldier as an aid in performing duty position tasks. It gives the soldier directions and signals when to take action. A job aid is also called a job performance aid.
- A checklist, procedural guide, decision table, worksheet, algorithm, or other aid delivered via electronic means and used by job incumbents to aid in task performance.

Job analysis
The process used to identify individual critical tasks (including leader tasks) a job incumbent must perform to successfully accomplish his/her mission and duties as well as survive on the battlefield. These tasks are the critical for that job. They may be one of four types:
- Common soldier tasks.
- Common skill level tasks.
- Critical individual tasks.
- Shared tasks.

Job and Task Analysis Plan
See "Training Development Project Management Plan."

Job performance test
An instrument used to determine whether or how well an individual can perform a job. See "Performance measures."

Joint school or course
A school or course, used by two or more services, which has a joint faculty. The director (commandant), who is provided on a rotational basis by the services, is responsible, under the direction of the Joint Chiefs of Staff, for the development and administration of the curriculum.

Joint training
Training in which elements of more than one service of the same nation participate.

Journeyman
A person who has learned a trade and works for another person in that specialty.

Just-in-Time Training Training provided to individuals or units just before the skills or function taught will be used in a practical application. Typically used to teach perishable or infrequently used skills. See "Training-on-demand."

K

Keystone publication
FM 100-5, Operations. The Army's manual that conceptualizes and describes the conduct of campaigns, major operations, battles, engagements, and peacekeeping missions, i.e., the full continuum of military operations. It provides the foundation for Army doctrine. It links the Army's roles and missions and National Military Strategy.

Knowledge
Information or fact required to perform a skill or supported task.

Knowledge-based test
Testing procedure that simply asks for recall or the selection of information or knowledge that does not directly relate to using or applying rules, principles, skills, etc., that are required to perform the learning objective. Also called "knowledge-oriented testing."

Note: Knowledge-based testing is **not used in TRADOC** for student performance measurement/testing.

Example: Asking for recall of an instrument setting or the selection of the correct definition for a term.

L

Lane Training
A technique for training primarily company team-level and smaller units on one or more collective tasks.

Lane Training Exercise (LTX)
The execution phase of the lane training process. It is an exercise used to train company-size and smaller units on one or more collective tasks (and prerequisite soldier and leader individual tasks and battle drills) supporting a unit's mission essential task list; however, it usually focuses on one primary task. An LTX consists of assembly area, rehearsal, lane execution, after-action review, and retraining activities which culminate the lane training process. An LTX is an situational training exercise conducted using lane training principles and techniques.

Leader development
The process of preparing military and civilian leaders, through a progressive and sequential system of institutional training, operational assignments, and self development , to assume positions and exploit the full potential of current and future doctrine. (AR 600-100)

Leadership
The process of influencing others to accomplish the mission by providing purpose, direction, and motivation. Effective leadership transforms human potential into effective performance. (AR 600-100)

Leader task
An individual task performed by a leader that is integral to successful performance of a collective task.

Lead site
The lead site is the one from which the VTT instructor initiates broadcast.

Continued on next page

Learner characteristics
The traits possessed by learners that could affect their ability to learn (such as reading level) and which are included in the target population description.

Learning
A change in the behavior of the learner as a result of experience. The behavior can be physical and overt, or it can be intellectual or attitudinal.

Learning activity
See "Learning step."

Learning approach
The training/education methods of instruction and techniques of delivery selected to best approach/reach the way students learn skills and knowledge.

Learning center
A facility primarily dedicated as a delivery point for individualized or small group multimedia based instruction. Learning centers contain the equipment and training materials needed for training or education.

Learning decay
A decrease of learned skills over a period of time if not practiced frequently. Decay can be retarded by the conduct of sustainment training. See "Decay rate.

Learning difficulty
A statistical rating collected when conducting a job analysis survey. It is an measurement of the time, effort, and assistance required to achieve performance proficiency.

Learning hierarchy
The relationships among objectives in which some objectives must be mastered before others can be learned. We can describe these as independent, dependent, and interdependent training objectives. See "Learning step."

Learning objective (LO)
A precise three-part statement describing what the student is to be capable of accomplishing in terms of the expected student performance under specific conditions to accepted standards. Learning objectives clearly and concisely describe student performance required to demonstrate competency in the material being taught. LOs focus the training development on what needs to be trained and focuses student learning on what needs to be learned. Both terminal and enabling objectives are learning objectives. See "Criterion-referenced instruction (CRI)."

Learning organization
An organization in which there is the continuous testing of experience and the transformation of that experience into performance and supporting skills/knowledge; this learning is accessible to the whole organization, and relevant to its core purpose.

Learning process
A series of purposeful activities (events) designed to change a student's ability to perform a task or supporting skill.

Learning step
A student activity that leads toward achievement of a learning objective. Learning steps are determined when the objective is broken down into its component parts. Often an explicit hierarchical relationship consisting of terminal learning objective, enabling learning objective, and learning step is maintained. Learning steps are identified and delineated in the lesson, training support package, or Army Correspondence Course Program outline during the design phase. It should be performance oriented. See "Learning activity."

Legacy
Refers to data, numbers, lessons, etc. that currently exist.

Lesson
The basic building block of all training. The level at which training is designed in detail. The lesson is structured to facilitate learning. A lesson normally includes telling or showing the soldiers what to do and how to do it, an opportunity for the soldiers to practice, and providing the soldiers feedback concerning their performance. A lesson may take the form of an instructor-presented, a SGI-presented, or a self-paced lesson, such as a correspondence course or CBI lesson.

- An instructor presented lesson or SGI presented lesson is documented as a lesson plan.
- A self-paced lesson must be of sufficient detail that the student can learn the material to the established learning objective standard on his own.
- An extension training lesson is a self paced instructional program developed, reproduced, and packaged for distribution to soldiers in the field. These lessons consist of a terminal learning objective, instructional text, practice, and immediate feedback to the soldier. See "Lesson outline" and "Lesson plan."

Lesson outline
An organized outline of the training material to be presented. It identifies the terminal learning objective, enabling learning objectives (optional), learning steps/activities, methods of instruction, media, references, instructor-to-student ratios, resources required, facilities required, safety factors, environmental considerations, and risk factor. The lesson outline is completed during the design phase of the training development process from training analysis data. See "Lesson" and "Lesson plan."

Lesson plan
The detailed blueprint for presenting training by an instructor or small group leader (SGL). It prevents training from becoming haphazard and provides for training standardization. It is built on the lesson outline and includes all the details required for the presentation. It must be of sufficient detail that a new instructor can teach the lesson with no decrement of training. See "Lesson outline" and "Lesson."

Linear programming
A programming method in which set sequences of frames require a response from the student at each step. The steps are so designed that errors will be minimal for even the slower students in the target population.

Live Fire Exercise (LFX)
Exercise that is resource-intensive; player units maneuver and employ organic and supporting weapons systems using full-service ammunition. LFXs integrate all combat arms, CS, and CSS elements. The extensive range and resource requirements usually limit them to platoon and company team levels. Consequently, their principal focus is unit and weapons integration at company team level. LFXs provide realistic training on collective and soldier skills. (FM 25-101) See "Exercise."

Live M&S
A representation of military operations using live forces and instrumented weapon systems interacting on training, test, and exercise ranges which simulate experiences during actual operational conditions. ***Example:*** National Training Center (NTC), Joint Readiness Training Center (JRTC), and/or Combat Maneuver Training Center (CMTC) rotation.

Live training
Training executed in field conditions using tactical equipment, enhanced by training aids, devices, simulators, and simulations (TADSS) and Tactical Engagement Simulation (TES) to simulate combat conditions.

Continued on next page

Local Area Network (LAN).
A LAN is the fundamental building block for the computer network. It is used to interconnect hosts within a small geographic area and provide high bandwidths with low delays. It is the user connection to the computer and the means by which data is loaded to or downloaded from the network. The user is connected to the computer network via the PC, which is connected to the LAN, the on-off ramp for data.

Lock-step instruction
A mode of instruction where all soldiers receive the same instructional events in fixed predetermined time periods. Soldiers move through the instruction as a group.

Logistics support analysis
An analysis of manpower requirements, operator and maintenance quality and skills, personnel training requirements, and training materials requirements.

Long-range Training Strategies
See "Training strategy."

M

M&S (models and simulations)
Live, virtual, and constructive models, including simulators, stimulators, and emulators. (AR 5-11)

M&S Activity
The development and maintenance of a computer-based M&S capability by or for organizations of the Army.

M&S Combat Developer
Command, agency, organization, or individual that commands, directs, manages, or accomplishes the work of combat development. Combat development is the process of analyzing, determining, documenting, and obtaining approval of warfighting concepts, future operational concepts, MNSs, operational requirements documents, organizational requirements, and materiel requirements. Process must be IAW TRADOC Pam 71-9 and in consonance with the TRADOC Warfighting Lens Analysis (WFLA) process governing all DTLOMS domains.

M&S Materiel Developer
The Research, Development, and Acquisition (RDA) command, agency, or office assigned responsibility for the system under development or being acquired. Materiel developers are responsible for the conception, development, and execution of solutions to materiel requirements identified and initiated through the combat development process.

M&S Proponent
The organization which has responsibility for the combat and training development of the prototype version of a model or simulation. The proponent will develop and execute a viable strategy for development, maintenance, and direction of the investment of available resources throughout the life cycle of the M&S. The M&S proponent serves as the advocate and final authority on its M&S. The proponent will advise the Deputy Under Secretary of the Army for Operations and Research (DUSA[OR]) on releasability of the M&S to foreign countries and will advise the major command (MACOM) or organizational release authority for domestic release. Except where responsibilities are specifically designated to an acquisition official by DoD or Department of the Army (DA) policy, e.g., DoD Directive 5000.2 or AR 70-1, the M&S proponent is responsible for but may delegate execution of ---
(1) M&S development.
(2) Configuration management.
(3) Preparation and maintenance of Simulation Object Models (SOMs), as appropriate.
(4) All aspects of verification and validation.
(5) Maintenance of current information in all catalogs and repositories.

M&S Training Developer
Command or agency that formulates, develops, and documents training concepts, strategies, requirements (materiel and otherwise), and programs for assigned mission areas and functions. Serves as user (trainer and trainee) representative during acquisition of their approved training materiel requirements (mission needs statement [MNS] and operational requirements document [ORD]) and TD program. Training developers are responsible for the conception, documentation, and execution of solutions to training requirements as identified during the combat development process.

Maintenance training simulator
A device, usually computer-controlled, that simulates operational equipment and allows trainees to practice maintenance tasks or procedures.

Major system
Acquisition Category I and II programs designated by the Under Secretary of Defense (Acquisition) or the Army Acquisition Executive. The Operational Test and Evaluation Command conducts user tests and evaluation. All systems not designated as Categories I and II are nonmajor (IPR).

Mandatory release date
Refers to the date at which individual National Guard or United States Army Reserve soldiers must be released from training to return to their home station.

Manpower and Personnel Integration (MANPRINT)
The entire process of integrating manpower, personnel, training, human factors engineering, health hazard assessment, and system safety into a system through the materiel development and acquisition process. It uses analytical models to help soldier-machine systems reach maximum performance. The models help predict manpower, personnel, and training needs by considering human factors engineering, manpower, personnel, training, safety, and health hazards.

Mark sense form
Computer readable sheets on which the soldier records identifying information and answers to questions.

Master
In validating training materials or tests, refers to an expert at the particular job or task.

Master Evaluation Plan
is the proponent's overall strategy for accomplishing evaluation/QA functions and providing specific descriptions of programs.

Mastery
Training: The performance of the training objectives within the prescribed conditions and to the stated standard.
On the job: Successful task performance without supervision or coaching.

Materiel fielding plan
A document containing detailed system information. This information provides for the detailed planning and actions required for deployment of the system.`

Maximum Class Size
The largest number of students in a class that can be trained with acceptable degradation in the training effectiveness due to manpower, facility, or equipment constraints.

Mean
Arithmetic average calculated by adding up all scores and dividing the total by the number of scores.

Mean score
Arithmetic mean score calculated by adding up and dividing the total of all scores by the number of scores.

Continued on next page

Measurement errors
Errors which occur due to the unreliability of the measurement process. These errors are random and are never completely absent. In addition, these may be systematic (nonrandom) errors due to some fault in the measurement process.

Media
A means of conveying or delivering information. *Example*s of training media are paper, film, videotape, broadcast television, computer program.

Mental skill
The active mental processes of identifying, classifying, using rules, and solving problems. Includes thinking, reasoning, analyzing, judging, and inferring functions. See "Skill."

Methods of instruction
Indicates exactly how the training material will actually be provided to the student and has an assigned instructor-to-student ratio. ***Examples*** of methods of instruction are conference, demonstration, and practical exercise. See Appendix H.

Military Qualification Standards (MQS) Manual
MQS manuals list all common, shared, and branch-specific critical tasks. Officers refer to the MQS manuals to determine critical tasks, professional knowledge, and special emphasis areas required to successfully perform their jobs. These manuals also provide reference courses and job aids to assist in task performance and self-development. They include --

- **MQS I Manual of Common Tasks (Precommissioning Requirements)**
  Provides the basic requirements each individual must meet before commissioning.
- **MQS II Manual of Common Tasks for Lieutenants and Captains**
  Concentrates on common critical tasks for all company-grade officers.
- **MQS II branch manuals (Lieutenants and Captains)**
  Focus on tasks that qualify the company-grade officers in a given branch.
- **MQS III Leader Development Manual (Majors and Lieutenant Colonels)**
  Provides additional readings to assist field-grade officers.

Note: MQS manuals will be phased out upon replacement by OFS products.

Minimum essential requirement
Actions, processes, or products that are essential to the Systems Approach to Training (SAT) process to ensure mission-focused, task-based, efficient and effective training.

Mission

- The commander's expression of what the unit must accomplish and for what purpose. (FM 101-5-1)
- A series of related tasks that comprise the major capabilities and/or requirements imposed on a unit by its parent organization or table(s) of organization and equipment. ***Examples:*** Defend in sector, conduct a hasty attack, and delay. Missions may be imposed to support the parent unit.

Mission analysis
Mission analysis identifies unit organizational and functional structure, develops a mission matrix, derives a mission by echelon list, and identifies critical collective tasks as well as individual (leader) tasks performed in direct support of the mission.

Mission essential task list (METL)
A compilation of collective mission essential tasks which must be successfully performed if an organization is to accomplish its wartime mission(s).

Mission needs statement (MNS)
A broad statement of mission need for a deficiency which can only be satisfied by a materiel solution. A MNS will be prepared for all Army acquisition programs regardless of acquisition category.

Mission Training Plan (MTP)
Provides comprehensive training and evaluation outlines, and exercise concepts and related training management aids to assist field commanders in the planning and execution of effective unit training. It provides units a clear description of "what" and "how" to train to achieve wartime mission proficiency.

Mnemonics
A technique such as a formula or rhyme used as a memory aid.

Model
A physical, mathematical, or otherwise logical representation of a system, entity, phenomenon, or process.

Modernization Resource Information System (MRIS)
The resource programming process which provides the MACOM with a method of identifying resources required to support a new system.

Module
A grouping of lessons in an approved course of instruction; it could consist of a single lesson, e.g., for distance learning. Synonymous with annex and subcourse. A module includes one or more training media/methods or combination thereof.

Multimedia
As a general term, multimedia is the use of more than one media to achieve a specific purpose or objective. The term is used primarily to refer to a technology combining text, still and animated images, video, audio, and other forms of computer data that can be manipulated and used to convey information in a useful, educational, entertaining, realistic, or more easily understood manner. Multimedia is delivered on a multimedia work-station/personal computer via network, hard disc, floppy disc, or CD-ROM.

Multimedia package
A self-contained instructional unit using more than one presentation medium.

Multinational doctrine
Fundamental principles that guide the employment of forces of two or more nations in coordinated action toward a common objective. It is ratified by participating nations.

Multiservice doctrine
Fundamental principles that guide the employment of forces of two or three Services of the same nation in coordinated action toward a common objective. Two or three Services ratify it and normally promulgate it in joint service publications that identify the participating services; e.g., Army-Navy doctrine.

Multitrack course
A course which employs more than one track or channel of instruction. Course content, degree of instruction, and presentation may vary to accommodate students with different aptitudes, skill, or knowledge; or resource constraints.

N

National Training Center (NTC)
The Fort Irwin training center that provides a heavy combat battalion task force 2 weeks of intensive combat training on a rotational basis.

Needs Analysis
The process used to identify valid --

- Non-training solutions to the performance deficiency.
- Training solutions to identified unit and individual performance deficiencies.
- Training development requirements. A training/training development requirement is established if the needs analysis results in the identification and implementation approval for a solution that justifies producing or revising training or training products. Proponents will develop or revise training or training products ***only*** when based upon a needs analysis to avoid unnecessary TD workload.

Continued on next page

New equipment training (NET)
An initial transfer of knowledge, gained during equipment development, from the materiel developer/provider to the trainer, user, supporter.

New equipment training plan (NETP)
A document which outlines milestones and other key data elements for training to support new equipment training.

Non-consolidated ACCP
That part of the Army Correspondence Course Program which is administered by the proponent school or agency. The proponent has sole responsibility for development, management, and administration of correspondence materials. These courses , phases, and subcourses are described in DA Pam 351-20, Army Correspondence Course Program (ACCP) Catalog , Chapter 4.

Nondevelopmental items (NDI)
Systems or training devices available off-the-shelf.

Non-performer
An individual who cannot meet a specified performance standard for a designated task or a terminal learning objective.

Non-Resident School
A location other than the resident school. Functions as an extension of the proponent school. Soldiers can be full-time or part-time students. Non-resident schools include the Reserve Component Training Institution.

Non-resident training.
Training presented to students that is not instructor/facilitator-led and does not take place in residence, e.g., it takes place in Army learning centers, DL classrooms, and student residences. Instruction is self-paced.

Non-TD (Task) Proponent
Any organization other than the TRADOC-assigned task proponent as listed in Appendix C, Training/TD (Task) Proponent Information. Non-proponents usually are proponents for other subject areas, functional areas, or branches responsible for units that must use the assigned proponent's task to accomplish their missions.

Non-training solution
A solution to an identified performance deficiency other than training.

Norm-referenced test
A test that grades a student based on the performance of other students taking the same test. Is scored based upon relative standards, such as class standings, rather than upon absolute standards, such as job competency.

O

Objective test
A test whose scoring requires no human judgment.

Objectivity
In testing, the degree to which a test is scored the same by two or more scorers acting independently.

Observation interview
A dialogue wherein a job holder is observed in the job environment performing all or a substantial part of the job. The jobholder performs the job while the analyst asks questions.

Occupational Data, Analysis, Requirements and Structure Program (ODARS)
A comprehensive system for collecting, processing, storing, and analyzing training and occupational information provided by job incumbents and their supervisors through the administration of survey questionnaires. ODARS provides imperial data for identifying individual critical tasks to training proponents.

Occupational survey
A system of collecting detailed military training and occupational information using computer processing, retrieval, and analysis.

One-station unit training (OSUT)
Initial entry training conducted at one installation in one unit with the same cadre and one program of instruction.

One-way Video
A satellite based teletraining system broadcasting from a studio facility. Students are able to see the instructor, but the instructor cannot see the students. Two-way audio is usually provided via telephone lines. See "Two-way Video."

Operating tempo (OPTEMPO)
The annual operating miles/hours for systems in a particular unit required to execute the commander's training strategy. It is stated in terms of the miles/hours for the major system in a unit; however, all equipment generating significant operating and support cost has an established operating tempo.

Operational requirements document (ORD)
A formatted statement containing performance (operational effectiveness and suitability) and related operational parameters for the proposed system. The operational requirements document will be initially prepared during Phase 0 "Concept Exploration and Definition". It will be updated during Phase 1, "Demonstration and Validation."

Optimum Class Size (OCS)
The largest number of students in a class that can be trained with no degradation in training effectiveness. The constraining factor is the availability of equipment, facilities, and manpower . OCS serves as the basis for determining equipment and resource requirements.

Organizational (or unit) assessment
A process used by Army senior leaders to analyze and correlate evaluations of various functional systems (such as training, logistics, personnel, and force integration) to determine an organization's capability to accomplish its wartime mission (or to accomplish military operations). (FM 25-101)

Overlearning
Practice beyond what is required for retention. This is also referred to as overtraining.

Overt behavior
Behavior which is observable and measurable. See "Covert behavior."

P

Peer training
A form of instruction in which students at the same or more advanced level of knowledge provide instruction to other students at the same or lower level of knowledge on the specific objectives.

Performance-based instruction
Instruction which develops student performance proficiency via task-based learning objectives written with an action verb. Students prove competency by actual performance of the objectives to the established standards.

Performance-based test
A test to determine if a student can perform the learning objective (the criterion) to the established standard without demonstrating actual performance. Also called "performance-oriented." See "Performance test."

Performance checklist
The breakdown of an objective into elements that must be correctly performed to determine whether each student satisfactorily meets the performance standards described in the learning objective.

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Performance deficiency
The inability of a unit or individual to perform the required tasks to the established standard.

Performance evaluation
A process of data collection and analysis to determine the success of students on learning to perform a specific learning objective, individual, or collective task to the established standard as a result of a training program.

Performance measures
The actions that can be objectively observed and measured to determine if a task performer has performed the task to the prescribed standard. These measures are derived from the task performance steps during task analysis. See "Task performance specifications."

Performance oriented training
Training in which learning is accomplished through performance or the actual doing of the tasks or supporting learning objectives under specific conditions until an established standard is met.

Performance Specification
A statement of requirements given in terms of the required results with criteria for verifying compliance but without stating the methods for achieving the required results. A performance specification defines the functional requirements for the item, the environment in which it must operate, and interface and interchangeability characteristics.

Performance step
A single discrete operation, movement, or action that comprises part of a task.

Performance test
A test of actual performance of an established criteria, such as a lesson learning objective, to determine if a student can perform the action under the prescribed conditions, to the established absolute standards. ***Example:*** Replace the gas mask canister on your M40-series protective mask.

Phase
A major part of a training course which may be trained at different locations. Phases are required as a necessary break-up of a course version due to time, location, equipment, and facility constraints as well as facilitation in management of different techniques of instruction. A phase contains one or more modules. See "Phased training."

Phased training
Training that has been compartmentalized into distinct phases to enhance learning. Distance learning phases may conserve resources.

Pipeline
The total time involved in training personnel once they are designated as trainees, including time traveling to the training activity, time awaiting instruction, time of training, and time from termination of training until reporting to the ultimate duty station. It may include more than one training activity.

Placement test
A type of pretest used to determine what parts of or level of training is needed.

Planning, Programming, Budgeting, and Execution System (PPBES)
A system that provides key decision points for training development managers when dealing with manpower and dollars. An integrated system for the establishment, maintenance, and revision of the Five Year Program and the DoD Budget. The DCST, HQ TRADOC, is responsible for resourcing training.

Population
A well defined group of subjects or things from which measurements are taken (e.g., all students 6 feet or taller; scores; measurements).

Posttest
A test administered after the completion of instruction to determine whether a student has mastered the objectives to the established standard. See "Pretest."

Practical exercise (PE)
The practical exercise is the hands-on application of the performance required in enabling or terminal learning objectives. Gives the student the opportunity to acquire and practice skills, knowledge, and the behaviors necessary to perform the training objective successfully.

Practical exercise/laboratory sheets
A proponent-produced document that describes the practical exercise that the student is to perform. They provide instructor and/or student guidance for exercise performance.

Practice effect
The influence of previous experience in taking a test for the second time or more. Familiarity with directions, types of items, and questions when taking the test again usually helps the examinee to score higher. Practice effect is greatest when the time interval between the test and retest is short and when the same form of the test is administered.

Predictive Validity
The extent to which the test predicts how well students will actually perform on the job. If a test has predictive validity it will answer the question: "Will the students be able to perform on the job?" It involves administration of the test and comparison of the test results to other indicators of student performance capability.

Preparing agency
A TRADOC school, integrating center, or staff element or a non-TRADOC agency (under MOA/MOU) that writes and coordinates ADTL within its area of responsibility.

Prerequisite training
That training which personnel must have successfully completed in order to be qualified for entry into training for which they are now being considered.

Pretest (diagnostic test)
An assessment which measures soldier or civilian task competency before training. As it measures performance against a criterion, results focus training on what soldiers/civilians need to know and provide links to this prescriptive training. As a placement test, it allows for testing out of lessons, modules, or phases of a course. See "Performance test" and "Posttest."

Printer's dummy.
A designed page-by-page prototype of a publication showing margins, areas of type, illustrations, readings and captions, and suggested colors.

Probability of deficient performance
Tasks selection criterion which ensures that training is given in those essential job skills in which job incumbents frequently perform poorly. This training identifies those tasks which are easier to perform incorrectly or are more difficult to accomplish.

Procedural task
A task for which a set of procedures has been published to produce the desired results. The procedures may be either a single fixed array (linear) or a set of alternatives on the contingencies encountered (branching).

Procedure
A standard and detailed course of action that describes how to perform a task.

Process standard
A standard for a task which consists of a series of steps resulting in the soldier obtaining a single result. The task is evaluated by observing the process and by scoring each step or element as it is performed in terms, of sequence, completeness, accuracy, or speed (e.g., put on the protective mask; take oral temperature).

Continued on next page

Product standard
A standard for a task which terminates in a product or outcome which is observable and measurable, The task is evaluated by looking at the product or outcome in terms of completeness, accuracy, tolerance, clarity, error, or quantity.

Professional development course
A course designed to prepare commissioned officers, warrant officers, or noncommissioned officers to effectively perform the duties required in assignments of progressively greater responsibility.

Proficiency
Ability to perform a specific behavior (task, learning objective) to the established performance standard in order to demonstrate mastery of the behavior.

Program Budget Guidance (PBG)
Guidance issued by HQ DA three times a year, generally January, May, and October. It outlines the Major Commands' (MACOMs) anticipated resources for both dollars and manpower by Army Management Structure Code (AMSCO) and Management Decision Package (MDEP).

Programmed instruction
Self-paced training, usually printed, with frames of information and questions organized so the choices direct the student to remedial frames or advanced material, as appropriate. The material is carefully sequenced and validated to ensure the target population can perform the learning objectives to the established standard.

Programmed training
The training of a critical task or supporting skills and knowledge. It includes all of the academic instruction that is in the course (reflected in the POI) and applies to resident and non-resident instruction. It includes common or shared task TSPs forwarded to non-proponent schools for inclusion in a formal course of instruction as a stand-alone lesson with a separate lesson number POI file number) and specific learning objectives. It--

- Is --
  - Conducted in resident or non-resident training.
  - Trained to standard.
  - Essential as it serves as the foundation for other training in the course.
  - A qualification training requirement.
  - Evaluated during instruction.

    Note: For common or shared task TSPs, it evaluates task performance during instruction under conditions prescribed in the TSPs.
- May require specific equipment.

Program of instruction (POI)
A POI covers a course/phase. It is a requirements document that provides a general description of course content, duration of instruction, and methods and techniques of instruction; and it lists resources required to conduct peacetime and mobilization training.

Program of instruction (POI) Proponent
See "Training/TD (Task) Proponent: Training proponent."

Program of Instruction Management Module (POIMM)
Provides an automated means for training developers to build a POI and CAD in accordance with TRAS.

Progressive training
Training which is sequenced to require increased levels of performance proficiency.

Project Management Plan
See "Training Development Project Management Plan."

Prompt
A word or other signal that initiates or guides behavior - a cue.

Proponency publications
The fourth level of the publication hierarchy. They describe doctrinal principles, tactics, techniques, and collective training tasks for branch-oriented or functional units. These units are concerned with performing specific activities on the battlefield. For ***example***, proponency publications on air defense units focus on the principles, tactics, techniques, and collective training tasks associated with performing air defense functions. Soldiers or trainers read proponency publications to find the principles by which a branch or functional unit operates, the tactics and techniques used to fulfill its role on the battlefield, and the collective tasks for training.

Proponent agency
An Army organization or staff which has been assigned primary responsibility for materiel or subject matter in its area of interest, i.e., proponent school, proponent staff agency, proponent center, etc.

Proponent school
The TRADOC school designated by the CG, TRADOC or other appropriate MACOM as Training/TD (Task) Proponent to exercise management of all combat/training development aspects of a materiel system, functional area, or task. It analyzes, designs, ,develops, implements, and evaluates training/training products for proponency area.

Proponent Training Development Plan
See "Training Development Plan."

Publication hierarchy
A five level structural representation of doctrinal and training publications designed to help trainers and soldiers identify the publication most relevant to their needs. This hierarchy serves the doctrinal and training literature managers, developers, and users of these publications. See "Keystone publication," "Capstone publications," "Combined arms publications," "Proponency publications," and "Employment procedures and soldier publications."

"Pull" distribution
Another term for "pinpoint distribution" and Standard Army Publication System (STARPUBS). Individual units determine their initial distribution requirements for all DA-numbered publications using the DA Form 12-series.

Q

Qualitative and Quantitative Personnel Requirement Information (QQPRI)
A document that provides information concerning numbers and qualifications of personnel involved in the use, maintenance, and transport of equipment or systems. Where appropriate, it also describes the personnel duties, MOS/skill levels, specialty code, and organization.

Quality control indicators
Checkpoints used to ensure the quality of each step of a process or function.

Quota Course
A course managed, controlled, and conducted by one service or agency which may be used by another service to satisfy a training requirement or need.

R

Random selection
A process of choosing people or objects at random rather than through some systematic plan. A selection is random when all elements available for selection have the same chance of selection.

Continued on next page

Rank order
The relative standing of an individual on a given trait with reference to other members of the group.
Example: When all members of a group of 10 are arranged in order from lowest to highest, the number I may be assigned to the one who stands highest, 10 to the lowest.

Rating scale
A measurement device in which a rater must choose a response from choices arranged in a continuum such as from low to high or good to bad.

Reading grade level (individual)
A number representing a person's ability to read and comprehend. This number is equated to the school grade level at which a student should be capable of reading and comprehending written matter. For ***example***, a reading grade level of "7" is representative of an individual being able to read and comprehend subject matter written at the seventh grade level. A sample of the individual's vocabulary is used to assess reading grade level. The assignment of a school grade level to the complexity of reading materials. Formulas used to calculate reading grade level are usually based on length of words and sentences.

Reclassification training
A soldier may be reclassified into a new job due to organizational restructure, mission or new/revised systems, etc. Reclassification training is training provided to those individuals which qualifies them to perform in a newly assigned job (MOS, AOC, etc.).

Redundant training
Training that occurs when training of a task is repeated at subsequent skill levels.

Reference-dependent task
A summary written for those tasks which require the trained soldier to refer to one or more publications while performing all or part of a task in operational conditions.

Reference-independent task
A summary written for those tasks which require the trained soldier to perform the task in operational conditions from memory, without reference to any publications.

Refresher training
Used to reinforce previous training and/or sustain/regain previously acquired skills and knowledge. It-
- Is --
  - Related to course-specific training objectives.
  - Performed under prescribed conditions and must meet prescribed performance standards.
- Usually takes place in the unit to sustain or retrain a previously required proficiency level; may be trained to prepare an individual for institutional training, i.e., meet prerequisite training requirements.
- May take place in a course during/outside of POI time.

Regional Coordinating Element (RCE)
The TRADOC office in the Continental U.S. (CONUS) sub-geographical region that facilitates the coordination for Army training instructors, students, training devices, equipment, and facilities for Reserve Component (RC) individual soldier training.

Reinforced task
See "Task reinforced."

Reinforcement training
See "Refresher training."

Release form
The form used to obtain written permission for use of copyrighted materials or pictures taken of persons.

Reliability
The extent to which the test/test item gives consistent results each time it is used. Any time a test item is examined for validity, it must also be examined for reliability.

Remedial instruction
Special instruction designed and delivered to alleviate deficiencies in the achievement of some of the learning objectives of an instructional program.

Remote site facilitator
The site facilitator manages students, assists the lead instructor as preplanned, and facilitates learning at the remote site. The site facilitator may be trained to function also as site coordinator.

Replication
Reproduction of electronic camera-ready copies (CRCs) on a tangible, material distribution medium, e.g, CD-ROM.

Request for Proposal (RFP)
RFPs state the identified requirement in performance terms. RFPs also state the intended use, data life-cycle maintenance requirements, necessary interfaces, and training environment for each required training product. Well-written training RFPs:
- Specify the performance requirements for the training product clearly so that the Government and the offerers can estimate the probable cost and the offerer can determine the levels of expertise, personnel, and other resources needed to accomplish the requirements,
- Cite verification requirement the Government will impose on offerer.
- Include proposal evaluation criteria. Offerers are free to propose any method of meeting the performance requirements as long as the proposed product meets the performance criteria stated in the RFP.

Requirement (TD workload)
Training development work that should be completed as determined by MACOM/DA taskers or by proponent-developed training strategies and proponent-conducted needs analysis.

Requirements Determination and Acquisition Process
Outlines the life cycle of the Army acquisition system from materiel concept investigation, through development and acquisition, until ultimate phase out and disposal. Materiel acquisition may initiate training requirements.

Research, Development and Acquisition TEMO (RDA)
1of 3 Army M&S domains. RDA includes all M&S used for design, development, and acquisition of weapons systems and equipment. M&S in the RDA domain are used for scientific inquiry to discover or revise facts and theories of phenomena, followed by transformation of these discoveries into physical representations. RDA also includes Test and Evaluation (T&E) where M&S is used to augment and possibly reduce the scope of real-world T&E.

Reserve Component Course Configuration (RC3) Program
A program that provides RC resident exportable training courses designed for use by RC training institutions as formal instruction. The program includes enlisted, warrant, and commissioned officer training. RC training institutions function as extensions of the TRADOC proponent school. RC training institutions include the Army National Guard (ARNG) academies, Reserve Forces (RF) schools, Reserve Forces Intelligence (RFI) schools, and Regional Training Sites - Intelligence. In addition, the program provides --
- Sustainment and transition courses for presentation in regional training sites-maintenance (RTS-M).
- Institutional quality resident training programs and supporting materials for Reserve Forces schools conducting annual training at TRADOC school locations.

Resident school
A training location other than the soldier's unit where the soldier is a full-time student. Resident schools include noncommissioned officer academies; service schools; training centers; and Total Army School System (TASS) schools (battalions), an extension of TRADOC proponent schools.

Resident training
Training presented, managed, and controlled by an instructor, facilitator, small group leader, or otherwise designated trainer.

Continued on next page

Resident training course
A course presented to students usually in a formal training environment by trained instructors. The training may be presented by conventional methods, such as conference; by advanced technology, such as computers; by distributed training methods; or a combination of methods.

Resource management
The control of the identification, acquisition, and use of training development and training resources to obtain maximum and timely training efficiency.

Response
Any activity which is induced by a stimulus. In instruction, it designates a wide variety of behavior which may involve a single word, selection among alternatives (multiple choice), the solution of a complex problem, the manipulation of buttons or keys, etc.

Risk
Risk is characterized by the probability and severity of a potential loss that may result from hazards due to the presence of an enemy, an adversary, or some other hazardous condition.
(FM 100-14).

Risk assessment
The identification and assessment of hazards (first 2 steps of risk management process), (FM 101-5-1) It is the process used to identify potential hazard(s) associated with training, set values on the risk elements, compare risks against training benefits, and eliminate unnecessary risks. It is an expression of potential loss in terms of hazard severity, accident probability, and exposure to hazard.

Risk assessment code (RIC)
A code, representing the risk assessment output, assigned to training products such as lessons and mission training plan.

Risk management
Risk management, as it applies to training development, is --
- The process used to identify task and training risks, set values on risk elements, compare risks against training benefits, and eliminate unnecessary risks.
- An expression of potential loss in terms of hazard severity, probability, and risk level.
- Tightly tied to force protection.
- A useful tool to help make decisions about hazards causing the risks.

S

Safety-in-training
Deals with **what** we train, i.e., it is a requirement to incorporate training safety into Army training. To do this, the training developer integrates safety requirements and risk management into training and training products, i.e., they identify and incorporate hazards (risk exposure) and prevention (risk control techniques) into individual training products (soldier training publications, lesson plans, etc.).

Sample
A limited number of observations out of the entire population for use in making inferences about the population (e.g., all soldiers at Fort Monroe would represent a sample, though not random, of all soldiers Army wide). A sample is a subset of a population.

Self-study
Individual study by which a soldier learns or reinforces previous learning, on his/her own.

Sequencing
In training design, the proper ordering of instruction which allows the student to make the transition from one skill or body of knowledge to another and assures that supporting skills and knowledge are acquired before dependent performances are introduced.

Sequential training
The ordering of training so that the learning of new or more complex skills/knowledge is built on and reinforces previously learned material. See “Sequencing.”

Severity
The expected consequence of an event in terms of degree of injury, property damage, or other mission-impairing factors (loss of combat power, adverse publicity, and so on) that could occur. (FM 101-5-1)

Shaping
The process of gradually changing a student's behavior until it conforms to the desired behavior.

Shared task
See “Task.”

Short-range Training Strategies
See “Training strategy.”

Simulation
- A method for implementing a model(s) over time.
- Any representation or imitation of reality, to include environment, facilities, equipment, mechanical and maneuver operations, motion, role playing, leadership, etc. It is the representation of salient features, operation, or environment of a system, subsystem, or scenario.

Simulator
(1) A device, computer program, or system that performs simulation.
(2) For training, a device that duplicates the essential features of a task situation and provides for direct practice.
(3) A physical model or simulation of a weapons system, set of weapons systems, or piece of equipment which endeavors to replicate some major aspect of the equipment’s operation.

Site coordinator
The site coordinator manages and operates the equipment in the VTT suite. The site coordinator may be trained to function also as remote site facilitator.

Situational Training Exercise (STX)
Mission-related, limited exercises designed to train one collective task or a group of related tasks and drills through practice. STXs teach the standard, preferred method for carrying out the task. They are more flexible than drills and usually include drills, leader tasks, and soldier tasks. STXs may be modified based on the unit METL or expanded to meet special mission requirements. To ensure standardization, service schools develop STXs to teach the doctrinally preferred way to perform specific missions or tasks. (FM 25-101) See “Exercise.”

Skill
The ability to perform a job related activity which contributes to the effective performance of a task performance step.

Skill level
Identifies task proficiency, or ability typically required for successful performance at the grade with which the skill level is associated. The skill levels by grade are shown below:

Skill levels	-->	1	2	3	4	5	
Enlisted	E	1/2	3/4	5	6	7	8/9
Warrant	W	1/2	3		4	5	
Officer	O	1/2	3	4	5	6	

Small group instruction (SGI)
A means of delivering training which places the responsibility for leaning on the soldier through participation in small groups led by small group leaders who serve as role models throughout the course. SGI uses small group processes, methods, and techniques to stimulate learning.

Small group leader (SGL)
An instructor who facilitates role modeling, counseling, coaching, learning, and team building in SGI.

Small group trial
In training development, the determination of the effectiveness of lesson material based on performance of a small representative sample (three to five) of soldiers from the target population.

Soft data
Data obtained with test instruments having low reliability, such as attitude and opinion surveys. See "Hard data."

Soldier's manual (SM)
ADTLP publications that contain critical tasks and other training information used to train soldiers and serve to standardize individual training for the whole Army; provide information and guidance in conducting individual training in the unit; and aid the soldier, officer, noncommissioned officer (NCO), and commander in training critical tasks. They consist of SMs and SM/TGs.

Soldier's Manual of Common Tasks (SMCT)
A document which contains the critical tasks which every soldier must be able to perform in order to fight and win on the battlefield. It provides the conditions, standards, and performance measures for each common soldier critical task.

Soldier Training Publication (STP)
Publications that contain critical tasks and other training information used to train soldiers. They serve to standardize individual training for the whole Army; provide information and guidance in conducting individual training in the unit; and aid the soldier, officer, noncommissioned officer (NCO), and commander in training critical tasks. They consist of SMs, SM/TGs, MQS/OFS manuals.

Soldierization
The process by which an initial entry soldier's appearance, behavior, values, attitudes, and standards become consistent with the those of the Army and the individual gains the degree of technical competency necessary to make a meaningful contribution to the organization's efforts to meet collective goals and objectives.

Solicitation document
The solicitation document describes the requirement of the Government clearly, accurately, and completely, to include terms and conditions of the procurement action. There are two main types of solicitation documents:
- Invitation for Bid.
- Request for Proposal.

Special condition
See "Condition."

Specialty qualification indicator
An identification of warrant officer or enlisted skill in addition to those of a military occupational specialty used to identify the positions and personnel with those special requirements or qualifications. Special qualification indicators are authorized for most military occupational specialties.

Specification
A contractual document which clearly and accurately describes the technical requirements for items, materials, or services and the procedures used to determine that the requirements have been met.

Staff and faculty (S&F)
The collective term given to all personnel involved in training and training development activities such as instructors, training developers, analysts, small group leaders, training facilitators, evaluators, training development middle managers, and senior training managers.

Staff and Faculty Development (SFD)
Refers to the process of ensuring that the total workforce (military, DA civilians, and contractors) can carry out their training and training development responsibilities through approved training programs, products, and courses which provide both basic and advanced technology training skills.

Standard
A statement which establishes a criteria for how well a task or learning objective must be performed. The standard specifies how well, completely, or accurately a process must be performed or product produced.
- The task standard reflects task performance requirements on the job.
- The learning objective standard reflects the standard that must be achieved in the formal learning environment.

Standardization
As applicable to Army training means --
- The development and implementation of performance standards which the Army employs in training and in combat.
- Units and soldiers performing the same task will be trained to perform that task to the same standard.
- Training products are produced in one format by the training proponent and used by other training activities.

Statement of Objective (SOO)
A Government-prepared document which is incorporated into the RFP that states the overall RFP objectives. The SOO may be provided in the RFP in lieu of a Government-written Statement of Work.

Statement of Work (SOW)
A document that accurately describes the essential and technical requirements for items, materials, or services, including the standards used to determine whether the requirements have been met. The SOW establishes a standard for measuring performance both during contract performance and upon contract completion.

Stem
The part of a multiple-choice test item which asks a question.

Stimulator
(1) A hardware device that injects or radiates signals into the sensor system(s) of operational equipment to imitate the effects of platforms, munitions, or environments that are not physically present.
(2) A battlefield entity consisting of hardware and/or software modules which injects signals directly into the actual sensor systems of an actual battlefield entity to simulate other battlefield entities in the virtual or constructive synthetic training environments.

Storyboard
A collection or series of small pictures or sketches arranged sequentially that describe the action and content in an audiovisual or visual-only production.

Structure manning decision review (SMDR)
An annual process that compares the total Army training requirements for a fiscal year against the training capability of a given TRADOC school and resolves the differences.

Student Evaluation Plan
A plan that details how the proponent school will determine if the student has demonstrated a sufficient level of competency to pass the specified course or training. It specifically identifies course completion requirements to include the minimum passing score (or GO/NO GO) for each written or performance examination, final grade requirement, minimum course attendance requirements (if applicable); and specific tests that must be satisfactorily completed to graduate. It very specifically identifies how the student's performance will be evaluated. Specific lessons tested in each test are identified. Counseling and retesting policy are delineated. Other evaluations, such as the Army Weight Control Program and Army Physical Fitness Test, that impact on graduation are identified, and their requirements are included.

Student performance counseling
As related to training, communication which informs soldiers/students about their training and the expected performance standards and provides feedback on actual performance. Soldier/student performance includes appearance, conduct, learning accomplishment, and the way learning is being carried out.

Continued on next page

Student workbook
A proponent produced document that provides preprinted exercises for student's study. May include graphics and text.

Study guide
As the name states, a document that guides the student through the process of studying a lesson or series of lessons. The student can use it for recording notes.

Subject matter expert (SME)
An individual who has a thorough knowledge of a job (duties and tasks). This knowledge qualifies the individual to assist in the training development process (i.e., consultation, review, analysis, etc.). Normally, a SME will instruct in his area of expertise.

Supervised on-the-job training (OJT)
Structured training accomplished while a person is working in a particular skill level and military occupational specially. The training is closely monitored by the soldier's supervisor because of equipment, safety, or skill requirements. Training support products such as training extension course lessons, interactive courseware, and correspondent subcourses may be integrated into supervised on-the-job training.

Supported task
See "Task supported."

Supporting schools
Those schools who have responsibility for training particular jobs in support of a new system but are not the proponent for the system itself. Supporting schools provide input to the STRAP in their areas of responsibility.

Supporting task
A critical task that must be performed in order for the supported task to be performed.

Supporting training proponent. An organization that is not the training proponent but is responsible for training and training development for one or more tasks associated with a new, improved, or displaced materiel system. There may be more than one supporting training proponent for a materiel system.

Sustaining Base (SB)
The sustaining base encompasses combat support (CS) and combat service support (CSS) Table of Distribution and Allowance (TDA) resources, management systems, facilities, and equipment located outside operational theaters.

Sustaining Base courses
Those courses that support SBT.

Sustaining Base Training (SBT)
SB training is provided primarily for civilian and military members of the TDA work force. It includes all non-combat and non-military occupational specialty (MOS)/area of concentration (AOC) skill level, additional skill identifier (ASI), Language Identifier Code (LIC), Skill Qualification Identifier (SQI), Skill Identifier (SI)-producing training provided to the civilian and military SB work force members.

Sustainment training
See "Refresher training."

Synthetic Environment
Linked M&S that represent activities at various levels of fidelity, abstraction, and realism from simulations of theaters of war to factories and manufacturing processes. These environments may be created within a single computer or a vast distributed network connected by local or wide area networks and augmented by super-realistic special effects and accurate behavioral models. They allow visualization of and immersion into the environment being simulated. (DoD Directive 5000.59-P)

Synthetic Theater of War (STOW)
STOW mission is to link any two or more of the three components of the Total Training Environment (Live, Virtual and Constructive).

Synthetic Training Environment
The evolution of expanding battlespace to accommodate the use of digitization, to include M&S capabilities, within the live, virtual, and constructive training environment in support of combat readiness.

System MANPRINT Management Plan (SMMP)
A management plan to ensure the combat developer/materiel developer take the six MANPRINT domains into account during the development of all materiel items.

System MANPRINT Management Plan (SMMP) Joint Working Group
Commonly referred to as the MANPRINT Joint Working Group (MJWG), this organization manages the MANPRINT issues during the materiel acquisition process. MJWG also provides oversight to ensure accomplishment of the MANPRINT process.

System proponent. The command, center, school, or agency responsible for the combat/training development associated with a new, improved, or displaced materiel system.

System training device
See "Training device."

System training plan (STRAP)
The master training plan for a new system. It outlines the development of the total training strategy for integrating the item into the training base and gaining units; plans for all necessary training support, training products, and courses; and sets milestones to ensure the accomplishment of the training strategy.

Systems Approach to Training (SAT)
The Army's training development process. It is a systematic, spiral approach to making collective, individual, and self-development training decisions for the total Army. It determines whether or not training is needed; what is trained; who gets the training; how, how well, and where the training is presented; and the training support/resources required to produce, distribute, implement, and evaluate those products. The process involves five training related phases: analysis, design, development, implementation, and evaluation. See "Training development (TD).

Systems interface training
Training that is - -
- Required to employ individual systems in a larger systems environment. It enables individual systems to interface with each other in this larger environment.
- Required after individual systems have been trained.
- Can be directed to leaders as well as system operators.

T

Tactics
The employment of units in combat. The ordered arrangement and maneuver of units in relation to each other and/or to the enemy in order to use their full potentialities. ***Example***: A commander designates a unit as a reserve and plans for its use.

TADSS proponent
A command or agency, normally a service school, that has primary responsibility for life-cycle management of an item of TADSS from conception through classification as obsolete.

TADV
Management Decision Package (MDEP) designation for training development.

Target audience description
A description of the quantity and qualifications of the personnel to be trained. They are the job holders. They perform all the tasks associated with the specific job. They will operate, maintain, and support a system or equipment, perform critical tasks and lead the unit. It describes the range of individual qualification and all relevant physical, mental, physiological, biographical, and motivational dimensions.

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Target population
The persons for whom the instructional or training materials are designed. Samples from this population are used in evaluating training materials during their development. Also called target audience.

Task
A clearly defined and measurable activity accomplished by individuals and organizations. It is the lowest behavioral level in a job or unit that is performed for its own sake. It must be specific; usually has a definite beginning and ending; may support or be supported by other tasks; has only one action and, therefore, is described using only one verb; generally is performed in a relatively short time (however, there may be no time limit or there may be a specific time limit); and it must be observable and measurable. The task title must contain an action verb and object and may contain a qualifier. Types:

- **Collective task**
  A clearly defined, discrete, and measurable activity, action, or event (i.e., task) which requires organized team or unit performance and leads to accomplishment of a mission or function. A collective task is derived from unit missions or higher level collective tasks. Task accomplishment requires performance of procedures composed of supporting collective or individual tasks. A collective task describes the exact performance a group must perform in the field under actual operational conditions.
- **Common task**
  - **Common skill level task**
    An individual task performed by every soldier in a specific skill level regardless of MOS or branch., e.g., a task performed by all captains.
  - **Common soldier task**
    An individual task performed by **all** soldiers, regardless of rank.
    Example: All soldiers must be able to perform the task, "Perform mouth-to-mouth Resuscitation."
    Note: There are common soldier tasks that apply to all Army civilian employees as well, e.g., Maintain security of classified information and material.
- **Critical task**
  A collective or individual task a unit or individual **must** perform to accomplish their mission and duties and to survive in the full range of Army operations. Critical tasks must be trained. Types of tasks that can be identified as critical include:
  - Collective task.
  - Common skill level task
  - Common soldier task.
  - Individual task
  - Shared task
- **Individual task**
  The lowest behavioral level in a job or duty that is performed for its own sake. It should support a collective task; it usually supports another individual task. Individual tasks include ---
  - Common soldier task.
  - Leader task.
  - Common skill level task.
  - Organizational level task
- **Organizational level task**
  Common skill level task shared by other skill levels, e.g., company captains and first sergeants may perform the same tasks.
- **Shared task**
  - **Organizational**: See "Task: Organizational level task."
  - **Shared individual task**: An individual task performed by soldiers from different jobs and/or different skill or organizational levels. Shared tasks are usually identified when conducting an analysis of a specific job.
    Example: The lieutenant and sergeant in the same platoon perform some of the same tasks.

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- **Shared task** (Continued)
  - **Shared collective task**: A shared collective task is a collective task that applies to or is performed by more than one type unit, e.g., to units which have different proponents or to different echelon/TOE units within a single proponent's authority. Since the task, conditions, standards, task steps, and performance measures of shared collective tasks do not change, the collective task is trained and performed in the same way by all units that "share" the task.

Task-based training
Training developed and implemented to train units and soldiers to perform critical tasks and supporting skills and knowledge to established performance standards. Critical tasks focus training on what really needs to be trained.

Task condition
See "Condition."

Task delay tolerance
An individual critical task selection factor. A measure of how much delay can be tolerated between the time the need for task performance becomes evident and the time actual performance must begin.

Task learning difficulty
An individual critical task selection factor. A statistical rating collected when conducting job analysis that indicates the time, effort, and assistance required by a student to achieve performance proficiency.

Task performance measure
See "Performance measures."

Task performance specifications
The specifications that describe how the task is actually performed, under what conditions it is performed, and how well the individual must perform it. They are the task performance details needed to establish the individual training strategy and to design and develop follow-on training. The specifications are --

- Task title.
- Task number.
- Task performance standard.
- Task performance condition.
- Task performance steps.
  - Supporting skills and knowledge for each performance step.
  - References required for performance step.
  - Safety factors, hazards, and considerations associated with for each performance step.
  - Environmental factors and considerations associated with for each performance step.
  - Equipment and materials required to perform the performance step.
  - Supporting individual task(s) performed as part of or in support of the individual task being analyzed.
- Performance measures.
- Supported individual task(s).
- Supported collective task(s).
- Army Universal task List (AUTL) supported task.
- Task certification requirements (if applicable).

Task performance steps
The major procedures (i.e., actions) a unit must accomplish to perform a critical collective task to standard. They –

- Describe the procedure the task performer(s) must take to perform the task under operational conditions.
- Provide sufficient information for task performer(s) to perform the procedure. (May necessitate identification of supporting steps, procedures, or actions in outline form.)
- Can be another collective task or an individual (leader) task (if a collective task step).

Task proponent
See "Training/TD (Task) Proponent."

Task reinforced
Task (identified in a lesson plan) for which the lesson provides refresher training. Task has been completely trained in a previous lesson.

Task selection board (TSB)
A management device which serves a quality control function in critical task selection. The board, composed mainly of subject matter experts, reviews the total task inventory and job performance data and recommends tasks for approval to the appropriate authority as critical tasks.

Task selection factors
A statistical factor collected by survey on all tasks listed in the individual total task inventory. These factors are applied by using a task selection model to identify which individual tasks are critical to job performance. See "Task selection models."

Task selection model
A model used to apply statistically valid task selection data to identify critical individual tasks. There are a variety of models available for use. Those commonly used are as follows:

- **Difficulty-Importance-Frequency model**
  An individual critical task selection model that uses difficulty, importance, and frequency factors.
- **Eight-factor Model**
  An individual critical task selection model that uses percent performing, percent time spent performing, consequence of inadequate performance, task delay tolerance, frequency of performance, task learning difficulty, probability of deficient performance, and immediacy of performance.
- **Four-factor Model**
  An individual critical task selection model that uses percent performance, and task learning difficulty.
- **Probability of Task Criticality Model**
  An individual critical task selection model used by the Occupational Data, Analysis, Requirements and Structure Program (ODARS).
- **Training Emphasis (TE) Model**
  An individual critical task selection model that uses the training emphasis factor to determine if a task is critical or not. The TE factor is collected from supervisors of job holders. It reflects how much emphasis the task should be given in training for a specific task. The TE is the most useful single training factor for critical task selection.

Task standard
See "Standard."

Task step
See "Task performance steps."

Task summary
A listing in the soldiers' training publications of the task title, number, and performance specifications, to include conditions, standards, and performance measures, references, and proponent for each individual critical task. Information is extracted from the individual critical task analysis. See "Task performance specifications."

- **Reference-dependent task summary.**
  A summary written for those tasks which require the trained soldier to refer to one or more publications while performing all or part of a task in wartime conditions.
- **Reference-independent task summary.**
  A summary written for those tasks which require the trained soldier to perform the task in wartime conditions from memory, without reference to any publications.

Task supported
Task identified in a lesson plan as being supported by instruction in that lesson, i.e., the lesson provides initial training for one or more of the performance steps, skills, or knowledge of the supported task.

Task taught
Task (identified in a lesson plan) that the lesson either ---

- Completely trains to standard ***or***
- Results in the complete training of the task to standard following partial training of the task in previous lessons.

TASS Training Battalions
The training institution of both the ARNG (state military academies, National Guard Bureau (NGB) Regional NCOA/Schools, etc.) and USAR (US Army Reserve Forces Schools/USARC NCOA, etc.). TASS Training Battalions comprise all NCOAs and schools of the Reserve Component.

Team
A group of people who function together to perform a mission or collective task.

Team teaching
The coordinated efforts of two or more instructors working together in an instructional situation.

Team training
The training of selected individuals, not necessarily from the same organization, to function together as a team.

Technical manual (TM)
A publication which describes equipment, weapons, or weapons systems with instructions for effective use. It may include sections for instructions covering initial preparation for use and operational maintenance and overhaul.

Technical manual verification
The Army's effort to ensure TMs are usable by the intended target audience. Hands-on performance of the procedures presented in the TM is the preferred method of verification. Preferably target audience soldiers will perform the verification. See "Technical manual."

Technique of delivery
Process or manner of delivering instruction that includes one or more methods. For example, group-paced instruction could use conference, discussion, demonstration, and practical exercise. A technique of delivery may involve a whole course, a phase, or a module.

Techniques
The general and detailed methods used by troops and/or commanders to perform assigned missions and functions, specifically, the methods of using equipment and personnel. ***Example***: A tactic of covering an obstacle with direct and indirect fires may be executed by emplacing machine guns on the flanks to place direct fire down the length of the obstacle and using mortars to place indirect fire on the obstacle. Both types of fires can be shifted beyond the obstacle to cut off withdrawal of an opposing force.

Teletraining
Video or audio training delivered via communication links such as satellite or cable links.

Template
In testing, the answer key used to grade tests. It can be a score sheet with correct answers listed or it can be electronic and used with an optical scanner to score tests.

Terminal learning objective (TLO)
The main objective of a lesson. It is the performance required of the student to demonstrate competency in the material being taught. A TLO describes exactly what the student must be capable of performing under the stated conditions to the prescribed standard on lesson completion. There is only one TLO per lesson regardless of presentation method or media and it has only one verb. The terminal learning objective may cover one critical task, part of a critical task (i.e., a skill or knowledge), or more than one critical task. The terminal learning objective may be identical to the critical task being taught, or there may be a disparity between them. Where there is a disparity, it is the terminal learning objective standard that the student must achieve to demonstrate competency for course completion. See "Learning objective (LO)" and "Enabling learning objective (ELO)."

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Test
A device, technique, or measuring tool used to --
- Determine if a student or group can accomplish the objective to the established standard.
- Determine it training does what it is designed to do efficiently and effectively.
- Measure the skill, knowledge, intelligence, abilities, or other aptitudes of an individual or group.
- Collect data as a basis for assessing the degree that a system meets, exceeds, or fails to meet the technical or operational properties ascribed to the system.

See "Criterion-referenced test"; "Knowledge-based test"; "Norm-referenced test"; "Performance test"; "Performance-based test; "Placement test"; "Pretest"; "Testing out."

Testing out
The process and procedure for enabling a student to take a course test (phase, module, lesson, etc.) to determine if the training covered by the test must be taken. A student passing a pretest to test-out of training will be given full credit for completion of the training covered by the test. This is a "pretest."

Total Army
Active and Reserve Component (Army National Guard and U.S. Army Reserve Forces) and Department of the Army civilians.

Total Army School System (TASS)
A composite school system comprised of the AC, ARNG, and USAR institutional training systems. The TASS, through the Army's training proponents, provides standard training courses to America's Army, focusing on three main points of effort---standards, efficiencies, and resources. The TASS is composed of accredited and integrated AC/ARNG/USAR schools that provide standard institutional training and education for the Total Army. The TASS training battalions are arranged in regions and functionally aligned with the Training/TD (Task) Proponents. (TR 351-18)

Total Army Training System (TATS) Course
A single course designed to train the same military occupational specialty (MOS)/area of concentration (AOC) skill level, Skill Qualification Identifier (SQI), additional skill identifier (ASI), Language Identifier Code (LIC), and Skill Identifier (SI) within the Total Army. It also includes MOS Qualification (MOSQ, i.e., reclassification), Army leadership, functional, professional development, and civilian courses. The course's Total Army structure (phases, modules, tracks, lessons, tests) and media ensure standardization by training all soldiers (regardless of component) on course critical tasks to task performance standard. Course lengths, but not academic hours, may vary due to such differences as Active and Reserve Component (AC/RC) training day lengths.

Total Army Training System (TATS) POI
A requirements document that provides a general description of the Total Army Training System Course content, duration of instruction, and methods of instruction and media. It lists critical tasks taught and resources required to conduct peacetime and mobilization training.
Note: This is the objective TATS POI.

Total Army Training System (TATS) Training Year
A training year that meets both the requirements and constraints, to include equipment and time, of the Total Army. Reserve Components are generally limited to 323 academic hours during a "training year" consisting of Annual Training (AT)/Active Duty for Training (ADT); Inactive Duty Training (IDT); and non-resident, self-paced distance learning (DL).

Total task inventory
A listing of all the individual tasks performed as part of a job. Critical tasks for the job are derived from this inventory. See "Job" and "Task."

Track
A designed, sequential, and progressive training path for a course. A single course may have multiple tracks, e.g., tracks for different equipment.

TRADOC Budget Guidance (TBG)
Narrative guidance and funding trails are issued twice a year, for the Command Budget Estimate (CBE) and for the Appropriation TRADOC Budget Guidance (ATBG), based on the appropriation funding letter received from HQ DA.

TRADOC Long-range Plan
The document which prescribes directions the command will follow over the next 10 years in preparing the Army for war and developing characteristics of the Army of the future. It also provides a structure upon which resources will be more accurately justified and allocated at every level and a framework from which subordinate plans will be prepared.

TRADOC materiel evaluation committee (TMEC)
Committee reviews all IPR/Army Systems Acquisition Review Council (ASARC) milestone decision review positions or test waivers of IOTE.

TRADOC Review of Manpower (TRM)
An annual process where TRADOC schools submit manpower requirements. TRADOC staff validates and recognizes these requirements, and available manpower is allocated to meet TRADOC priorities.

TRADOC Staff and Faculty Common Core
A series of training requirements that provide critical baseline skills in the conduct, development, and management of training.

TRADOC System Manager (TSM)
An individual appointed by the CG, TRADOC, responsible for coordinating the CD, user, and trainer efforts in the life cycle management of the assigned system. This individual also is responsible for doctrinal and organizational standardization or interoperability with NATO.

Trainer
- An individual who conducts training, whether in a unit or a training institution.
- For the Train the Trainer Program, it implies all training related personnel involved in the training mission, such as instructors, training developers, analysts, small group leaders, and evaluators.

Training aids, devices, simulators, and simulations (TADSS)
A general term that includes Combat Training Center (CTC) and training range instrumentation; Tactical Engagement Simulation (TES); battle simulations; targetry; training-unique ammunition; dummy, drill, and inert munitions; casualty assessment systems; graphic training aids; and other training support devices. All of these are subject to the public laws and regulatory guidance governing the acquisition of materiel. TADSS are categorized as system and nonsystem:
- System Training Devices (STDs): STDs are designed for use with a specific system, family of systems, or item of equipment, including subassemblies and components. STDs may be designed/configured to support Individual, crew, collective, or combined arms training tasks. They may be stand-alone, embedded, or appended. Using system-embedded TADSS is the preferred approach where practical and cost effective.
- Nonsystem Training Devices (NSTDs): NSTDs are designed to support general military training and nonsystem-specific training requirements.

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Training and Evaluation Guide
The section of the task summary in a soldier's manual which lists the pass/fail performance measures for evaluating the soldier's performance on the task.

Training assessment
An analytical process used by Army leaders to determine an organization's current levels of training proficiency on mission essential tasks. (FM 25-100)
Note: Leaders use the results of training evaluations to make commander's training assessments.

Training Circular (TC)
TCs are publications (paper or computer-based) which provide a means to distribute unit or individual soldier training information that does not fit standard requirements for other established types of training publications. They may contain training reference data; procedures for using equipment, devices, or simulators; training procedures; training development procedures; and training material. TCs are part of the Armywide Doctrinal and Training Literature Program (ADTLP).

Training course
Structured, sequenced training designed to train a student to perform identified learning objectives to the prescribed standard. The training may be presented by advanced technology, such as computers; by conventional methods, such as conference using trained instructors; by distance learning techniques, such as distributed print or interactive multimedia instruction (IMI) modules; or by a combination thereof.

Training data product
Contains information related to the analysis, design, development, presentation, evaluation, or the life-cycle maintenance of training, regardless of its form or physical characteristics.

Training developer
- The individual whose function is to analyze, design, develop, and evaluate training and training products, to include development of training strategies, plans, and products to support resident, non-resident, and unit training. Any individual functioning in this capacity is a training developer regardless of job or position title.
- In developing systems, the command or agency responsible for the development and conduct of training which will provide the tasks necessary to operate and logistically support the new materiel system.

Training development (TD)
The Army's training development process is the Systems Approach to Training (SAT). It is a systematic, spiral approach to making collective, individual, and self-development training decisions for the total Army. It determines whether or not training is needed; what is trained; who gets the training; how, how well, and where the training is presented; and the training support/resources required to produce, distribute, implement, and evaluate those products. The process involves five training related phases: analysis, design, development, implementation, and evaluation.
Note : Do not confuse the overall TD process with the particular Systems Approach to Training (SAT) phase called "development," which is related specifically to the development of training and training products following analysis and design.

Training development management
The process TRADOC schools use to plan training development, determine and allocate TD resources, schedule TD, and ensure quality training products are produced.

Training Development Plan
The title "Training Development Plan" is a generic name for a master planning document. Different proponent schools may have used different titles in the past. It functions as a top-level plan covering all resourced requirements (reflected in training development project management plans) and unresourced requirements. It includes all

Training Development Plan (Continued)
required training products (resident and nonresident courses, training support package, etc.) and all training development processes (mission analysis, job analysis, etc.). It shows what training development workload must be accomplished during the execution, budgeting, and programming years; and it increases in detail up to the execution year. It does not have to be a formal plan: the requirements can be in a database and not formalized in a report. The plan is for internal proponent school use.

Training development planning
The planning of all aspects of training development including but not limited to funding, staffing, resourcing, and scheduling. The degree of planning varies with the office or command level and products produced. Long-range planning covers years three through twenty past the execution year. Planning helps ensure the most efficient use of manpower and other resources to develop the important training first. See "Training Development Project Management Plan" and the "Training Development Plan."

Training development products
Products of the training development process that enable the formulation and implementation of training programs. They include items such as critical task lists, correspondence courses, lesson plans, and training materials.

Training Development Project Management Plan
The training development project management plan is the proponent plan for developing training for a single, resourced, TD requirement, such as development or revision of resident and nonresident courses, analyses, doctrine literature, and strategies/plans. Is based on a valid TD requirement identified during needs analysis or training design strategy development; details the personnel, milestones, costs, material, TDY and all other factors required to develop the training; is for internal use, and can vary in details and complexity, depending on the training development project. This plan can be simple, unwritten (i.e., the project requirements exist but are not formalized in a report) or complex, very detailed, and may even include a Memorandum of Understanding.
Examples:
- Course Development Plan
  A type of TD Project Management Plan which details the proponent plan for designing and developing a course. It may include projected timelines as well as time, personnel, and TDY resource requirements
- Job and Task Analysis Plan
  Type of TD Project Management Plan which details the proponent plan for conducting a job and task analysis. It may include projected timelines; time, personnel, and TDY resource requirements; and data collection strategies

Training development requirement
The training solution to a performance deficiency determined during needs analysis or training strategy development.

Training Development Workload Planner--Automated Systems Approach to Training (TDWP-ASAT)
An automated training development (TD) workload database used to assist in the management of TD workload. Will be subsumed into ASAT (Workload Management menu option).

Training device
Three-dimensional object and associated computer software developed, fabricated, or procured specifically for improving the learning process. Categorized as either system or nonsystem devices.
- **System device**
  Device designed for use with a system, family of systems, or item of equipment, including subassemblies and components. It may be stand-alone, embedded, or appended.
- **Nonsystem device**
  Device designed to support general military training and nonsystem-specific training requirements.

Training device needs statement
The proponent documentation describing the role of the proposed nonsystem training device in the training programs and the expected basis of issue plan.

Training device requirement (TDR)
The proponent prepared documentation of requirements for a nonsystem training device which require research and development.

Training effectiveness (TE)
A measure of how well the learning objectives have been met. The evaluator determines whether the unit or soldier meets or exceeds established training standards.

Training effectiveness analysis (TEA)
A general category of studies for assessing the cost and/or effectiveness of TRADOC's training strategies, programs, and products.

Training efficiency
The determination of how well training resources were used to train effectively. See “Training effectiveness.”

Training equipment
An item of tactical or nontactical equipment or components used for training purposes in which the pieces of equipment do not lose their identity as end items for operational purposes, e.g. rifles, vehicles, communication equipment, and aircraft.
Note: Subject to availability, conversion of operational equipment that is already in the Army inventory to training equipment will be accomplished by executing a change to the gaining organization's TDA, thereby authorizing the item of equipment to be issued to the organization. Operational equipment required for training that is not in the Army inventory will be procured as items of TADSS IAW AR 70-1 and AR 350-38.

Training emphasis
See “task selection model.”

Training environment
The physical and cognitive environment which fosters, stimulates and facilitates learning. The "environment" includes a myriad of variables, such as the physical location or site where unit or individual training is conducted; training aids, devices, simulators, and simulations (TADSS), to include level of simulation (live/virtual/ constructive); automation hardware/software; suitability (change to "applicability and effectiveness") of training materials; delivery technique (small group instruction, IMI, VTT, etc.); instructor/facilitator effectiveness/ competency.

Training evaluation
The process used to measure the demonstrated ability of individuals or units to perform a task to the task performance standard; e.g., "GO" or “NO GO."

Training event
Scheduled training activity for initial or sustainment training of a mission, collective task, or individual task in a unit as identified by a combined arms short-range unit training strategy.

Training, Exercises, and Military Operations (TEMO)
1 of 3 Army M&S domains which manages Army M&S application. TEMO includes most forms of training support at echelons, from individual simulation trainers through collective, combined arms, joint, and/or combined exercises. TEMO includes military operations’ mission rehearsals and war planning evaluations of all phases of the operations. Exercises may be joint, combined, or single service. Training is the Army’s Title 10 responsibility to educate and train individuals and organizations.

Training facility
A permanent or semi-permanent facility, such as a firing range (range towers, scoring benches, lane markers, range signs), confidence course, military operations on urbanized terrain (MOUT) complex, aircraft mock-up, jump school tower, or training area.

Training gate
Prerequisite training that must be attained by the members of the training audience prior to the execution of planned training. If the training audience hasn't attained the specified level of proficiency, the training to be presented cannot be accomplished to the required standard.

Training management
The process commanders and their staffs use to plan training and related resource requirements needed to conduct and evaluate training. It involves all echelons and applies to any unit in the Army regardless of strength, mission, organization, or equipment assigned.

Training materials
Those materials developed as a result of training design and provided to teach or evaluate training. They include, but are not limited to; computer based instruction, correspondence courses, training literature products, student handouts, and other products used to train to a prescribed standard.

Training means
Combinations of events and media (live or simulation) that might be selected to train a mission/task. You must select an appropriate means for each time you intend to conduct training on a task. See "Training event".

Training media
See “Media.”

Training method
The procedure or process for attaining a training objective. ***Example***s include lecture, demonstration, discussion, assigned reading, exercise, examination, seminar, and programmed instruction.

Training objective
A statement that describes the desired outcome of a training activity in the unit. It consists of the following three parts: task, condition(s), standard.

Training-On-Demand. Training provided to a unit at the commander's request to meet an immediate mission need. See “Just-in-time Training.”

Training plan
A detailed description of the actions, milestones, and resources required to implement a training strategy. The detail depends upon the plan type and level. See “Project Management Plan” and “Training Development Plan.”

Training program
An assembly or series of courses or other training requirements organized to fulfill a broad, overall training goal.

Training proponent
See “Training/TD (Task) Proponent.”

Training requirements
- As related to training implementation --
  The critical tasks Army's units and soldiers must be able to perform to the standard required if they are to be able to fight, win, and survive on the battlefield. Army training and training products will only be produced to meet a valid training requirement and to train soldiers and units to perform critical collective and individual tasks to established standards.
- As related to resident course management ---
  The number of personnel required to enter into training to meet commitments of the military services concerned.

Training Requirements Analysis System (TRAS)
The management system that provides for the documentation of training and resource requirements in time to inject them into resource acquisition systems. The TRAS uses three types of documents--the Individual Training Plans (ITPs), Course Administrative Data (CADs), and Programs of Instruction (POIs).

Continued on next page

Training resources
Those human, physical, financial, and time requirements used to conduct and support training.

Training safely
Deals with **how** we train. It is achieved by identifying task performance safety hazards and integrating safety in training procedures during training design, development, and implementation. Safety in training and training safely are not one and the same.

Training sequence
Ordering the parts of a training program/course to optimize learning.

Training site
Any location where training is implemented, to include proponent school, soldier's home, learning centers, and units.

Training site selection
See "Training strategy: Short-range Training Strategy."

Training solution
A solution to a performance deficiency. See "Needs analysis" and "Training development requirement."

Training strategy
The general description of the methods and resources required to implement a training concept. It lays out the who, what, where, when, why, how, and cost of the training. The development of a training strategy includes determining the training site and media selected to train each critical task.

- **Combined Arms Training Strategy (CATS)**
  See "Combined Arms Training Strategy (CATS) under Section "C."
- **Unit Training strategy**
  The training design (plan) to attain and sustain the desired level of performance proficiency on mission essential or critical collective tasks. These strategies are based on mission and critical collective analysis data and evaluation feedback. They establish the need to produce collective training products and materials. Unit strategies are prepared in the form of a gunnery, maneuver/collective, and soldier matrix.
- **Individual training strategy (ITS)**
  A cradle-to-grave description of the methods and resources required to develop and implement individual training. It describes, who (soldier), what (task), where (training site), when, and at what cost the training will be developed and implemented. There are long-range and short-range individual training strategies.
- **Long-range training strategy**
  The **long-range estimation** of who, how, when, and where training will be provided. The time period extends from the third year following the execution year and beyond. It also identifies resource estimates for the POM. Long-range training strategies are developed/updated after needs analysis determines a training requirement(s) exists. Long-range plans, e.g., ITP, document future training requirements.
  Example: Needs analysis determines a requirement to develop training to support a new MOS or system. Strategy development determines the best way to train these tasks is by a training device. This requirement is entered in the ITP for the affected MOS skill level(s).
- **Short-range Training Strategies**
  The **short-range determination** of who, how, when and where tasks will be trained. The time period includes the execution plus the two budget years. Short-range training strategies are developed following the critical individual task analysis. They are supported by updated long-range plans (e.g., ITP) and development/update of short-range training plans/models.
  Example: Strategy development determines that CBI is the best way to train several of the approved critical tasks. Developers then develop a CBI project management plan and design the CBI product.

Training structure
The organization of instruction into logical groupings to facilitate learning. The basic structures of formal Army training are: phases, modules (annex, subcourse), and lessons. See "Sequencing.

Training subsystem
A new system's training support system. The training subsystem includes soldiers' manuals, training guides, skill development tests, Army Mission Training and Evaluation Plan, crew/ battle drills and training devices. It also includes technical manuals, extension training materials, facilities, ranges, targets, training ammunition, training literature, television, graphic training aids, motion pictures, programs of instruction, and lesson plans.

Training support
The provision of the materials, personnel, equipment, or facilities when and where needed to implement the training. It includes such functions as the reproduction and distribution of training products and materials, training scheduling, student record maintenance.

Training Support Center (TSC)
An authorized installation activity with area responsibility to provide storage, instruction, loan/issue, accountability, and maintenance for TADSS.

Training Support Package (TSP)
A complete, exportable package integrating training products, materials, and information necessary to train one or more critical tasks. It may be very simple or complex. Its contents will vary depending on the training site and user. A TSP for individual training is a complete, exportable package integrating training products/materials necessary to train one or more critical individual tasks. A TSP for collective training is a package that can be used to train critical collective and supporting critical individual tasks (including leader and battle staff). There are various uses of TSPs that fall under these categories:

- Collective/Warfighter TSP
  A complete, stand alone, exportable training package integrating training products and materials needed to train one or more critical collective tasks and supporting critical individual tasks (including leader and battle staff). It is a task-based information package that provides a structured situational training scenario for live, virtual, or constructive unit or institutional training.
- **Common or shared individual task TSP**. This is a TSP for one or more common or shared tasks.
- **Lane Training TSP**. A package of material used to plan, execute, and assess lane training.
- **RC3 TSP**. A package of course training material configured (redesigned) from AC resident courses.
  Note: TATS Course TSPs replaced RC3 TSPs.
- **TADSS TSP**. A TADSS TSP is a complete package integrating all training products and materials needed to provide individual or collective training in the operational use or maintenance of a TADSS. It may be an exportable package for use in units to "train-the-trainer", a package for use in units to train individuals or teams, or a package exclusively used within an institution to train instructors or students on the utilization of the TADSS. The primary TADSS TSP product is an approved, validated TSP containing all material required to implement the training at the unit or institution. Its contents will vary depending on its type or use.
- **Training/TATS Course TSP**.
  Contains all guidance and materials needed to train all critical tasks of a particular course to the Total Army.
- **TSP for collective task(s) trained in the unit**.
  TSP prepared or approved by the proponent school for unit training of critical collective task(s).
- **TSP for individual task trained in unit**. A TSP prepared by the proponent school for a critical individual task selected during the media selection process for training at the unit. It contains all guidance/material needed to train the task.

Training Support Package (TSP) (Continued)

- **WARFIGHTER TSP**.
  A collective TSP that fully supports training for all units; i.e., both current and Force XXI units (sometimes referred to as analog and digital, respectively). See "Collective/Warfighter TSP."
- **Warrior TSP**.
  A package of training products/materials necessary to train one or more critical individual tasks anywhere in the world, to include in the institution, at the unit, or in a soldier's home. Training may be conducted using formal instruction, self study, or distance learning in a live, virtual, or constructive environment.
- **WarMod TSP**
  A package of training products/materials used to initially train individual operator/maintainer/repairer, battle staff, or collective tasks for new equipment/systems. It provides the means to deliver training anywhere in the world, to include in the institution, at the unit, or at the contractor facility. Training may be conducted via formal instruction or distance learning in a live, virtual, or constructive environment. It will be used for Instructor and Key Personnel Training (IKPT) and may include doctrine, tactics, techniques, and procedures training.
- **Training test support package (TTSP)**.
  Information provided the tester for use in evaluating training on new systems. This package includes the program of instruction, soldiers' manuals, trainers' guides, ARTEP mission training plan changes, and training devices. It also includes embedded training components, training ammunition, targets, technical documentation, and training extension materials.

Training system
A training system is the combination of all elements of a training program working together to bring about the preparation of units to perform their missions and/or personnel to effectively perform their assigned jobs. A training system consists of training hardware, facilities, and personnel subsystems.

Training/TD (Task) Proponent
There are two basic organizational functions as described below:

- **Training Proponent**
  Organization responsible for **managing and presenting training** of a materiel system, functional area, or task. May or may not also be the TD (Task) Proponent.
- **TD (Task) Proponent**
  The organization responsible for **managing and conducting development of training** for a materiel system, functional area, or task as well as managing the development thereof. May be a school or another activity. May or may not also be the Training Proponent. See "Proponent school" and "Non-TD (Task) Proponent."

Training technology
The use of technology for the development, delivery, and/or implementation of learning oriented activities to accomplish the learning objective. It includes hardware/software solutions and/or human learning process solutions to training problems. Examples of hardware/software training technologies include Interactive Multimedia Instruction (IMI), linked simulations, virtual reality, artificial intelligence, embedded training, voice input/out devices and global networks.

Training transfer
The ability to apply learned behavior (task, or supporting skills and knowledge performance) to an operational setting under operational conditions.

Training week
Consists of the **total** number of hours that training can be conducted during any given week. A normal training week is 40 hours; mobilization, 60 hours. The training week includes **academic** and **administrative** time.

Transition training
Unit training that is responsive to changes in equipment, doctrine, or organization. It has three parts to include: (1) training individuals
assigned to the unit before the change, (2) training those assigned to the unit after the change with prior experience, and (3) embedding in the unit's training program the sustainment training of the required individual and collective tasks.

Triggering circumstance
The report or action that causes the conduct of a needs analysis. The report may be formal or informal.

Two-way Video
A satellite or terrestrial based teletraining system. The students can see the instructor and the other students, and the instructor can see the students. The same link that provides the video provides two-way audio. See "One-way Video."

U

United States Army Training and Doctrine Command Long Range Plan
See "TRADOC Long-range Plan."

United States Army Training and Doctrine Command Review of Manpower
See "TRADOC Review of Manpower (TRM)."

Unit training
Training (individual, collective, and joint or combined) which takes place outside the Army's institutional base.

(Unit) training evaluation

- Unit training evaluation is the process used to identify collective and individual task performance and product deficiencies in unit training and to obtain recommendations for improvement of training or the products that support training. (This is referred to as an "external evaluation" by the Training/TD (Task) Proponent.)
- The process used to measure the demonstrated ability of individuals or units to perform a task to the task performance standard; e.g., "GO" or "NO GO."
- The process used to measure the demonstrated ability of individuals and units to accomplish specified training objectives. (FM 25-100)

Uplink
The teletraining site that broadcasts the training. There is only one uplink site in a teletraining network capable only of one-way video over satellite. In a network capable of two-way video all sites are uplinks, See "Downlink."

V

Validation

- Validation is the process used to determine if new/revised courses and training products/materials accomplish their intended purpose efficiently and effectively. It is the process used to determine if training accomplishes its intended purpose. Validation and revising training are continuous actions in the teaching/revising process of training improvement. Validation of products/materials involves ---
  - Individual and/or group validation trials depending upon the nature of the training product.
  - Verification of their training effectiveness in training the objective.
  - Determination of beneficial improvements in the quality of training products and materials.
  - Identification of training product deficiencies.
  - Improvement of efficiency, effectiveness, and utility of training objectives, structure, sequence, products, and materials. In the "testing" context, it is the process of determining the degree of validity of a measuring instrument (e.g., skill qualification, end-of-module, and end-of-course comprehensive tests).

Continued on next page

Validation (Continued)
- In the 'technical manual' context, it is the process used by a contractor to test an equipment publication for completeness, compliance with contractual requirements, and technical accuracy.

Validity
a broad term which refers to the extent to which a test measures what it is intended to measure. Although there are several types of validity and different classification schemes for describing validity there are two major types of validity that test developers must be concerned with are content-related and criterion-related validity.

Vertical alignment of tasks
Tasks are vertically aligned when a task identified for a specific skill or organization level supports a task at the next higher skill level. Tasks in the same category (subject area) must be progressive, i.e., they show an increase in performance required at the next higher skill level, the conditions and standard are more exacting, or there are increased supervisory responsibilities when compared to supporting tasks. The task should indicate the increase in required performance or supervisory responsibilities.

Vertical alignment of training
Training is vertically aligned when tasks for a particular skill level are built upon skills, knowledge, and behaviors gained during previous training and/or operational assignments. If tasks are in the same general categories, then their training must be progressive -- they must show an increase in the skill level required to accomplish them, the conditions and standards must be more exacting, or the tasks represent increased supervisory responsibilities when compared to related tasks trained earlier. Task statements should indicate the increase in required skill level or supervisory responsibility.

Video Teletraining (VTT)
Video training delivered via communication links such as satellite or cable links. There are two types of VTT: broadcast and desktop.

Virtual M&S
A replication of actual warfighting equipment and munitions with the capability to execute collective training and rehearsal on a specific terrain data base. Links to Live and Constructive M&S through analog and/or digital links.

Virtual training
Training executed using computer generated battlefields in simulators with approximate physical layout of tactical weapons systems and vehicles. Virtual tactical engagement simulation (TES) training permits units to maneuver over much larger areas.

VTT Instructor
The instructor who conducts training via a VTT system. Examples include Teletraining Network (TNET), Integrated Services Digital Network (ISDN), and Satellite Educational Network.

W

Warfighter Training Support Package
See “Training Support Package.”

WarMod Training Support Package
See “Training Support Package.”

Warrior Training Support Package
See “Training Support Package.”

Web-based Training
Web-based training is a DL method in which training applications residing on a central computer functioning as a network server are delivered across a public or private computer network (e.g., the Internet) to students at any location and displayed on a Web browser. Authorized students may access training applications on demand and download them for individualized instruction. Web-based training can be updated very rapidly, and access to the training may be controlled by the training provider.

Weight points
A means of identifying which lessons, tests, learning objectives, etc. are more or less important in relation to the total training program. Weight points are assigned to each test according to the importance of the test to job performance. A scale of 0 to 1000 is often used. Weight point distribution is shown in the student evaluation plan.

Wide Area Network (WAN)
A WAN is used to interconnect geographically dispersed LANs and hosts. It is the means to transfer data between installations and other distant sites; it brings data to or carries data from an installation.

Written performance-based tests
Used to assess the student's ability to apply facts, principles, procedures, etc., required to perform the learning objective. Essay, short answer, and multiple-choice questions (in order of preference and effectiveness of measurement) can be question types for performance-based tests.

Written performance test
Performance tests that require the student to write in the performance of the job task, e.g., complete a form; compute.