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MARINE CORPS ORDER 1553.2A

From: Commandant of the Marine Corps
To: Distribution List

Subj: MANAGEMENT OF MARINE CORPS FORMAL SCHOOLS AND TRAINING
        DETACHMENTS

Ref: (a) MCO 1553.1B, The Marine Corps Training and Education
            System
        (b) MCO P1553.4A, Professional Military Education
        (c) MCO 1510.34A, Individual Training Standards System
            (ITSS)
        (d) MCO P3500.14G, Aviation Training and Readiness Manual,
            Volume 1
        (e) MCO P3500.72, Marine Corps Ground Training and Readiness
            Manual Program
        (f) Training Development System (TDS) Guide, Sep 2000
        (g) Marine Corps Systems Approach to Training (SAT) Manual,
            Oct 2003
        (h) Marine Corps Automated Instructional Management System
            (MCAIMS) User's Manual, Mar 1998
        (i) MCO 1550.26, Policies and Procedures Governing Marine
            Corps Institute (MCI) Training and Education Products
        (j) MCO 1510.69B, Individual Training Standards System for
            Formal School Faculty
        (k) MCO 1553.7, Using the By Name Assignment System
        (l) MCO 1580.7D, Interservice Training
        (m) MCO 3104.1, Marine Corps Visual Information and Combat
            Camera Support Manual (Short Title: MCVICCS)
        (n) MCO 3500.27A, Operational Risk Management
        (o) MCO 5100.29, Marine Corps Safety Program
        (p) MCO P5100.8F, Marine Corps Ground Occupational Safety
            and Health (OSH) Program
        (q) OPNAVINST 6120.3, Preventive Health Assessment
        (r) MCO 5311.1C, Total Force Structure Process (TFSP)
        (s) MCO P7100.8K, Field Budget Guidance Manual
        (t) MCO P5102.1A, Marine Corps Ground Mishap Reporting

Encl: (1) Formal School Instructor Course (FSIC) Pre-screening
            Checklist
        (2) Curriculum Developer Course (CDC) Pre-screening
            Checklist

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

  (3) Administrator Course (AC) Pre-Screening Checklist
  (4) Formal Schools Management Checklist
  (5) Formal Schools Seat Coordinating Instructions
  (6) Operational Risk Assessment Worksheet (ORAW)
  (7) Cease Training (CT) Procedures and Requirements
  (8) High-Risk Training (HRT) Courses at Formal Schools
  (9) M&RA HRT Instructor Pre-Assignment Checklist
  (10) Student Type Codes
  (11) Formal School HRT Instructor Program
  (12) Definitions and Procedures

1. <u>Purpose</u>. To publish management policies and procedures for the establishment and operation of Marine Corps formal schools and training detachments.

2. <u>Cancellation</u>. MCO 1553.2, MCO 1553.5.

3. <u>Background</u>

  a. The management of Marine Corps formal schools was formalized with the publication of the original version of this Order, and reference (a), in 1991 by the Director, Training and Education Division, Marine Corps Combat Development Command (MCCDC). In 1999, the Training and Education Command (TECOM) was established to provide a common commander to all Marine Corps training centers, schools, detachments, and professional military education (PME) institutions. CG, Training Command (TRNGCOM) assumed command and control of Marine Corps schools and training detachments at other services schools, and CG, Education Command (EDCOM) assumed command and control of PME institutions. In 2002, TECOM was reorganized for greater effectiveness and the CG directed all schools to incorporate Operational Risk Management (ORM) to safely implement the curricula.

  b. This revision includes organizational and functional changes effecting the management of formal schools and detachments. It also defines the requirements for ORM in Marine Corps courses and specifies special management requirements for HRT.

4. <u>Policy</u>

  a. <u>Authority for Training</u>

   (1) Under the authority vested in the Commandant of the Marine Corps (CMC) by Title 10 U.S.C., the CG, MCCDC advises and guides Marine Corps commanders of the operating forces and supporting establishment in all matters related to training and

education.

(2) Under that authority, the CG, TECOM is responsible for validating training requirements; developing collective and individual training standards; and overseeing unit-level training policy, formal school training, and professional military education. Only the CG, TECOM will task Marine Corps formal schools and detachments to develop training courses. All requests for formal training course development, whether funded by CG, TECOM, CMC, Marine Corps Systems Command (MARCORSYSCOM), or the unit, must be evaluated and approved by the CG, TECOM. All formal courses will be developed to meet the requirements published in either Individual Training Standards (ITS) Orders or Training and Readiness (T&R) Manuals. Similarly, only the CG, TECOM will approve integrated curriculum plans for MOS training and direct the Distance Learning Center (DLC) to develop DL courseware to support such plans.

(3) Acting for the CG, TECOM, the CG, EDCOM is the table of organization (T/O) sponsor for the Marine Corps University and responsible for administering all Professional Military Education (PME) programs per reference (b).

(4) Acting for the CG, TECOM, the CG, TRNGCOM is the T/O sponsor for all Marine Corps formal schools, administrative detachments, and training detachments.

   b. Training Standards

(1) Training standards form the basis for the development and acquisition of new training and educational systems, equipment, and devices. In formal schools/detachments and the operating forces, training standards are the basis for identifying training and education resource requirements such as instructors, ranges, ammunition, facilities, and other logistical support.

(2) ITSs are established per reference (c), and published as in the MCO 1510 series. ITSs are also published in Marine Corps T&R Manuals in the MCO P3500 series per references (d) and (e). ITSs state the training required by MOS, the training provided at the formal school or detachment, and provide a standard of competence to be achieved. Subject Matter Experts (SME) from the operating forces, the supporting establishment, and formal schools collectively develop training standards under the guidance of CG, TECOM.

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(3) Once the ITSs are published, the tasks designated for instruction at the formal school/detachment become the foundation for course development or revision. In the case of T&R manuals, all 100-level individual training events serve as the foundation for course development. The exception to this process is when no tasks or events exist for a particular occupational field or for a specific piece of equipment. Requests for such exceptions will be forwarded to CG, TECOM (C 469/C 4610) for approval. Those tasks/ events not designated for instruction in entry-level courses will serve as the foundation for skills-progression courses of instruction or for unit Managed On-the-Job Training (MOJT) programs. Individual standards are the basis for DL courses developed in support of MOS training. DL courseware is an element of the integrated curriculum plan developed by the Integrated Curriculum Design Board (ICDB) per reference (f).

c. <u>Training Development</u>

(1) During the development phase of the SAT process, formal schools produce the Program of Instruction (POI) and the Course Descriptive Data (CDD) per references (g) and (h). The POI details the execution of the course. The CDD is an estimate of the resource requirements for the course.

(2) All formal schools and detachments required to submit CDDs/POIs are further required to create them using the most recent release of the MCAIMS (except for proof of concept CDDs, explained below).

(a) CDDs are produced for new courses and for revisions to existing courses. Formal schools and Marine Corps detachments submit new and revised CDDs to the CG, TECOM, CG, TRNGCOM, or CG, EDCOM, as appropriate. Formal schools and detachments will review all active CDDs annually in connection with the TECOM (C 464) annual budget data call.

(b) The CDD contains 24 essential elements providing the justification for development or refinement of formal training or professional military education courses. The 24 elements provide a summary of the course, including the instructional resources, course length, a breakdown of curriculum hours, and the task list indicated in the ITS Order or T&R Manual for formal school training. It also serves as a concept document and provides the justification for POI development. Specifically, the CDD does the following:

<u>1</u> Indicates the school's concept of how the course will meet the training requirements established in the Individual

Training Standards (ITS) Order or Training and Readiness (T&R) Manual.

       <u>2</u> Identifies resource requirements needed to conduct the course.

       <u>3</u> When approved, authorizes further course development or refinement, and commits TECOM resources for implementation.

       (c) A school/detachment may submit a CDD and POI as a proposal to change a course for a number of reasons, e.g., publication of new training standards, departure from requirements published in an ITS order or T&R manual; new equipment; and revised tactics, techniques, and procedures. Justification for any recommended changes must accompany the revised CDD.

       (d) The CDD is the first document prepared by a schoolhouse identifying necessary resources for a particular course. It is important, therefore, that the CDD be submitted in sufficient time to allow the TECOM staff to budget, POM, or otherwise commence action to obtain the required resources. CDDs and POIs (or an equivalent document) for consolidated courses at other service schools are reviewed to ensure that applicable training standards are being met regardless of which service teaches the course.

       (e) Schools and detachments may be tasked to develop a course of instruction within certain limitations that preclude normal, MCAIMS-assisted CDD preparations (e.g., a course proposed by the Advocate, School, MARCORSYSCOM, or TECOM for which training standards have not yet been developed). For the development of this type of new course, a *Proof of Concept CDD* will be submitted containing the following information: course title, purpose, scope, length, location, class capacity, class frequency, and training/education support requirements.

       <u>1</u> The Proof of Concept CDD will be submitted under cover letter identifying why the course is required, what deficiencies it will correct, and why it should be conducted in a formal school setting.

       <u>2</u> A CDD for a new course that replaces an existing course will identify the replaced course identification and title, and the anticipated effective date of replacement.

       <u>3</u> Proof of concept CDDs will include an assessment of the school's ability to execute the instruction using existing resources (structure, facilities, equipment, funding). The Proof of Concept CDD will identify critical resource shortfalls and it

will detail interim plans for execution of this training until all resource requirements can be addressed.

        <u>4</u> In the event an external agency (e.g., M&RA, SYSCOM, etc.) is actively working the resource shortfall, the schoolhouse will detail the extent and status of their effort.

        (f) For revisions to existing courses, formal schools/ detachments will submit both a CDD and POI simultaneously for approval to CG, TECOM. Waivers to this policy should be requested from and approved by CG, TECOM. If a waiver is requested it must contain justification for why the POI has not been developed, detail the proposed changes to the POI, and project a date for POI submission. A school/detachment may submit a CDD and POI as a proposal to change a course for a number of reasons, e.g. publication of new training standards, departure from requirements published in an ITS order or T&R manual; new equipment; and revised tactics, techniques, and procedures. Any requests to deviate from published training standards will typically be staffed by CG, TECOM to the Occupational Field (OccFld) sponsor. Full justification for any recommended changes must accompany the revised CDD.

        (g) The POI will be reviewed for efficiency, conformity with the CDD, and compliance with references (g) and (h). Each task will have one corresponding Terminal Learning Object (TLO). Changes to the POI may be directed before approval is granted. Formal schools will limit instruction to the subjects and the designated proportions approved in the POI. The normal peacetime training week should average 40 hours (8-hours per day times 5 work days) of which at least 35 hours should be academic time. Any administrative time in excess of 5 hours per week should be conducted after hours or fully justified in a waiver request to CG, TECOM (C 469/C 4610).

        (h) Every Marine Corps formal course of instruction must have a POI approved by CG, TECOM (MCRD, MWTC), CG, TRNGCOM (formal schools and detachments), or CG, EDCOM (PME schools). A course will convene at a Marine Corps formal school or detachment only with an approved POI or an applicable CG waiver authorizing the course to commence. A revised POI will be submitted as soon as a substantial change to a course is made. If no substantial changes are made, then a revised POI, capturing all minor changes, will be submitted every three years.

        (i) POIs for courses taught at multiple locations will be submitted by the lead school as separate MCAIMS-produced documents under a single cover letter. The lead school will ensure

the learning objectives, test items, concept cards, and MLFs mirror each other to the greatest extent possible. The intent is to provide standardized training at each location, while allowing for differences resulting from different training resource levels (i.e., number of ranges, geographic dispersion, classroom size). CG, TRNGCOM will designate lead schools and adjudicate any issue that cannot be resolved between the schools. Further information on CDDs, POIs, and MCAIMS is provided in references (g) and (h) or by contacting CG, TECOM (C 469).

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

(k) Course information contained in the MLF and the training schedule must match the approved CDD/POI. The training schedule will contain, at a minimum, the lesson designators, titles, and the times. The training schedule may also contain the number of instructional days, scheduled breaks, administrative hours, required equipment, and instructor names.

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

d. Faculty Development

(1) Prior to (TEMINS if possible), or within 90 days of their assignment, all Marine Corps formal school and detachment personnel will attend, the Instructional Management School (IMS) course required for their billet. Instructors will attend the Formal School Instructor Course (FSIC), curriculum developers will attend the Curriculum Developer Course (CDC), and school/detachment commanders and administrators will attend the Administrator Course (AC). CG, TECOM (C 469TM) maintains service-level management and operational oversight for the IMS. All personnel will complete the SAT and ORM DL courses prior to attending the required IMS course. School/Detachment commanders will use enclosures (1, 2, or 3) to screen personnel to ensure that all prerequisites have been met prior to attending the required IMS course.

(2) Instructors who have previously completed another service's instructor training course are not required to attend the FSIC. However, school and detachment commanders, at their discretion, may require all instructors, regardless of prior training or experience, to attend the IMS FSIC. Regardless of previous training or education, all curriculum developers and administrators will attend the appropriate IMS course.

(3) Formal schools and detachments will contact the appropriate IMS to secure a seat in the required course and to initiate a funding request for Marines attending the course via TAD or TEMINS. When possible, Marines in receipt of PCS orders to a formal school should attend the appropriate IMS course under TEMINS. If attending the course on TAD orders, personnel assigned to formal schools and detachments located east of the Mississippi River, will attend IMS East located at Camp Johnson, North Carolina. For formal schools and detachments located west of the Mississippi River, to include Hawaii and Okinawa, personnel will attend IMS West located at Camp Pendleton, California. Requests for exceptions to this policy may be forwarded to CG, TECOM (C 469TM). Funding for Marines to attend these courses is provided by CG, TECOM (C 464). Formal schools and detachments must budget for and allocate unit TAD funds for civilian employees and other service personnel to attend these IMS courses. All schools and detachments must maintain training records for each faculty member (civilian and military) documenting their completion of required training.

(4) Marine Corps formal schools and detachments will establish a policy for faculty development. Faculty development programs should center on maintaining proficiency in the Formal School Faculty ITSs listed in reference (j). The faculty development program should also include refresher and or advanced training/education in course content (MOS specific skills); and advanced or emerging topics in curriculum, instruction, evaluation, adult learning and school administration. Several Marine Corps formal schools have partnered with local colleges and universities to provide faculty development seminars. Such partnerships are not required, but are encouraged if they provide the commander with a cost-effective program to advance the skills of assigned personnel. The CG, EDCOM is authorized to establish PME-unique training for instructors assigned to Expeditionary Warfare School, Command and Staff College, and Marine Corps War College. Instructors assigned to the Staff NCO Academies will continue to attend the IMS course required for their billet.

e. Evaluation in the Formal School/Detachment

(1) The goal of evaluation in the school or detachment is to determine the effectiveness of a training/education course. The purpose of evaluation is to identify potential improvements to courses by validating course content, evaluating instructor performance, assessing student achievement, and measuring graduate performance. School commanders conduct course evaluations on an ongoing basis as part of the school's overall evaluation plan.

(2) Evaluations are conducted in accordance with reference (g) and are categorized as internal, external, formal, informal, qualitative, or quantitative, based on when the evaluation is conducted, who conducts the evaluation, and the type of data collected. Formal schools and detachments conduct evaluations on an ongoing basis by surveying students, graduates, and their supervisors. The results of these surveys enable school administrators to make required changes to the course. Survey results also become inputs to a Course Content Review Board (CCRB). The results of the CCRB are captured in the Record of Proceedings (ROP) and are forwarded to CG, TECOM (C 469/C 4610), along with a revised CDD and POI, if required. The CCRB ROP also provides the justification for recommended changes to published training standards. Specific aspects of the instructional program subject to evaluation include:

(a) Measuring the program's effectiveness at meeting the requirements defined by the training standards.

(b) Reviewing the design of courseware.

(c) Evaluating instructor performance and the school's faculty development program.

(d) Evaluating the impact of, or the potential for, the infusion of technology-based instruction, simulation, or Electronic Performance Support Systems (EPSS) into the course of instruction.

(e) Gathering and analyzing data on student reaction to the instruction, student performance in the course, and graduate performance on the job.

(3) Formal schools and detachments must conduct appropriate evaluations as defined in reference (g). Schools and detachments will convene a formal CCRB every three years. The CCRB should be scheduled prior to the required submission of a revised POI. Formal CCRBs are planned and conducted by the school/detachment and

attended by representatives from the operating forces, the occupational field sponsor, and TECOM. The CCRB reviews the effectiveness of the instructional program, recommends changes to the course, and forwards the ROP to CG, TECOM (C 469/C 4610) for approval. Any recommended change to the course should be supported by evaluation data.

(4) School/Detachment commanders may convene a CCRB at any other time if the need for significant changes to the curriculum has been identified. Submitting the CCRB ROP and a revised CDD is the preferred method for schools and detachments to recommend changes to training standards and the attendant course. For courses taught at multiple locations, a joint CCRB will be convened to ensure curriculum content remains consistent. All recommended curriculum changes must be validated and approved by the appropriate approving authority.

(5) Formal school and detachment commanders should periodically request a Curriculum Assistance Visit (CAV) by contacting CG, TECOM (C 469TM). The team will consist of a TECOM Curriculum Supervisor and Task Analyst, and a Curriculum Development SME from the appropriate IMS. The CAV will assist the school in all areas that impact the curriculum, delivery of instruction, and student learning. CAV Teams will use the checklist outlined in enclosure (4) as a guide for evaluation of all school/detachment instructional programs.

    f. <u>Administration and Oversight</u>

(1) School/Detachment commanders will use reference (k) for guidance regarding the automated reporting of course attendance, attrition, and graduation.

(2) Class schedules for a course of instruction will be submitted via the TECOM Integrated Management System (TIMS) Scheduling Wizard by 1 June each year. Class schedules are based on the personnel input figures contained in the current Training Input Plan (TIP) and will agree with the approved CDD. Specific TIP submission guidance is provided in enclosure (5).

(a) Inability to provide a class schedule that meets the planned input figures of the TIP must be fully explained by school commanders/directors.

(b) Adjustments to approved schedules of one week or less may be approved by school commanders/directors; however, notification of changes and explanation of the conditions

surrounding the change must be made to CG, TECOM (C 4611).

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

(3) In the event a class must be extended beyond the normal length due to reasons outside the control of the school, (i.e., natural disaster, facility problems, etc.), the school will contact the CG, TECOM (C 4611/C 464) so an adjustment to assigned resources can be initiated.

(4) When individual and/or collective training standards have not been published, TECOM will ensure all training is based on Marine Corps doctrine, tactics, techniques, and procedures.

(5) If standards have not been published and Marine Corps doctrine, tactics, techniques, and procedures do not exist, or appropriate instruction exists outside of the Marine Corps, Marines will attend other service or civilian schools per reference (l). If there are Marine-unique training requirements not covered in the Inter-service Training Review Organization (ITRO) course, coordinate with CG, TECOM (C 469/C 4610) to develop required standards and curriculum.

(6) Identifying training support requirements.

(a) Formal school commanders that require Combat Visual Information equipment support must coordinate and submit written request for training support and resources from local Combat Visual Information Centers (CVICs) in accordance with reference (m).

(b) When requirements cannot be filled by the local CVIC, that CVIC will request assistance from CG, TECOM (C 468). For formal schools and detachments not collocated with a Marine Corps CVIC, requests for assistance should be forwarded to the host commander in accordance with appropriate inter-service agreements and other governing directives. If this assistance is not locally available, it can be provided in accordance with reference (m).

(c) When training and education support requirements, such as training devices, courseware, or specific technical expertise, cannot be filled by in-house Marine Corps or host command assets, it may be necessary to request contract support from organizations external to the Marine Corps. In those cases, school commanders will forward requests for contractor support, with detailed justification, to CG, TECOM (C 461).

(7) Marine Corps organizations desiring formal school status should submit a request, via the chain of command, to CG, TECOM. Requests must meet criteria listed below:

(a) The instructional program is for a recommended formal skills progression course of instruction (e.g. Advanced Personnel Administration Course) and covers training standards previously designated as Managed On-the-Job Training (MOJT).

(b) The instructional program is for newly identified training requirements developed in accordance with new formal training standards (e.g. Marine Corps Martial Arts Program).

(c) Marine Corps formal schools budget requirements (supplies, travel, civilian labor, etc.) are supported by CG, TECOM, Financial Management Branch (C 464).

(d) Quotas or scheduling controlled by CG, TECOM (C 4611).

(e) A Table of Organization (T/O) established by CG, MCCDC in response to manpower requirements determined by CG, TECOM (C 469/C 4610) and resourced by CG, TECOM (C 460).

(f) A CDD and POI approved by CG, TRNGCOM for each course of instruction.

(g) Instruction and instructional support funded under a training program element number established by the Marine Corps.

5. Training Safety

a. Operational Risk Management in the Formal Schools/ Detachments

(1) ORM is a process that enables commanders to plan for and minimize risk while still accomplishing the mission. School and detachment commanders must comply with the process detailed in references (n), (o), and (p), when designing, developing, implementing, and evaluating training programs. The CG, TECOM retains the responsibility for oversight of ORM in the formal schools and detachments and for ensuring ORM considerations are addressed during the analyze phase of the SAT process.

(2) School and detachment commanders will apply ORM during the Design, Develop, Implement, and Evaluate Phases of the SAT process. ORM requirements for training will be built into the

curriculum during the Develop Phase. An Operational Risk Assessment (ORA) will be conducted for each training lesson/event in the POI and the associated ORM tools will be incorporated in the Master Lesson File (MLF). Using enclosures (6) and (7), the commander will conduct a risk assessment and determine cease training criteria and procedures for each lesson/event. During the Implement Phase commanders must ensure proper safety controls are in place to minimize the risk of injury or loss of life. Additionally, all personnel must be briefed on, and understand, the cease training criteria. ORM related measurements must be incorporated in both internal and external course evaluations. Lessons learned from student and supervisor feedback captured during the Evaluate Phase are key inputs for refining the curriculum and instruction.

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

(4) A lesson/event ORAW will identify Safety Hazards and publish Safety Controls, Cease Training Criteria, and Cease Training Procedures.

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

(6) All formal school faculty will complete the approved Marine Corps ORM Distance Learning (DL) course prior to attending the billet specific, resident IMS course. Completion of the DL course combined with the ORM instruction provided in the resident IMS courses will enable faculty to fully institute the ORM process in their schools.

b. <u>ORM Process Training in Formal Schools and Detachments</u>

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

(2) ORM Training Prior to Liberty. Commanders will provide liberty-specific ORM training to students and staff prior to commencing special liberty periods of 72 hours and greater. When feasible, the training should include a practical exercise requiring students and staff to complete an ORAW for their planned activities, and the worksheets should be reviewed by the instructor or supervisor. CG, Training Command maintains a standardized ORM class for use by all schools, but local modification is at the discretion of the commander.

c. <u>High Risk Training (HRT) in the Formal School/Detachment</u>

(1) To ensure Marines are ready for combat, the Corps must conduct physically challenging, demanding, stressful, and at times, dangerous training. The purpose of this HRT policy is to reduce the risk of death and serious injury to the lowest possible level during training.

(2) HRT is defined in the formal school setting as: Basic or advanced individual or collective training, essential for preparing Marines and units for combat, that exposes students and instructors to the risk of death or permanent disability despite the presence of and adherence to proper safety controls. For a course to be designated as HRT, commanders shall submit justification to CG, TRNGCOM for approval. Enclosure (8) is a list of courses designated as HRT.

(3) The planning and execution of all training, to include HRT, shall incorporate ORM to minimize risk while providing the realism needed to meet operational requirements. Additionally, all prospective HRT instructors (military and civilian) shall be screened for suitability prior to assuming their duties; reference (q) and enclosure (9) apply. Screening requirements contained in this Order are waived for military and civilian personnel serving as HRT instructors prior to 1 June 2003.

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

(5) The provisions of this Order do not seek to eliminate all exposure to risk when such exposure is necessary to meet valid training objectives. Due to the dangers inherent in HRT,

additional safeguards are required. Marine Corps operations require aggressive training programs that prepare personnel to perform high-risk operations effectively.

(6) Formal school and detachment commanders are required to institute the policies contained in references (n) through (p), and this Order, to ensure every reasonable measure is taken to reduce the risk to injury or loss of life. Nothing in these Orders supplants the need for commanders to be involved in all aspects of training. The intent is to implement the rigors of a sound ORM process in combination with the Corps' time-tested, commonsense approach to leadership.

6. <u>Responsibilities</u>

a. <u>Deputy Commandant, Manpower and Reserve Affairs (DC, M&RA); Director, Personnel Management Division (MM); Director, Reserve Affairs Division (RA)</u>

(1) Maintain sponsorship of assigned student types as contained in enclosure (10) to meet the needs of the operating forces. Sponsorship is defined in reference (k).

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

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

(4) Validate, prioritize, and submit TIP requirements to CG, TECOM (C 4611).

(5) Pre-screen all HRT Instructor candidates per reference (q) and enclosure (9) prior to assignment to Marine Corps Formal Schools or Detachments.

b. <u>Deputy Commandants of the Marine Corps, Division Directors, and Heads of Separate Offices, Headquarters, U. S. Marine Corps, Deputy Directors, MCCDC</u>

(1) Provide inputs to proposed training affecting their occupational fields.

(2) Participate in the TDS outlined in reference (f).

(3) Assist CG, TECOM in the determination of training standards, revisions to existing curricula, the infusion of DL technologies, and the development and execution of an integrated curriculum plan for MOS training outlined in references (f) and (g).

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

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

(6) Attend annual TIP conference with representatives from each Marine Force in order to submit training requirements.

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

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

(9) Determine formal school seat requirements per enclosure (5).

   c. Commanding General, Training and Education Command (TECOM)

(1) Promulgate, develop, coordinate, monitor, and evaluate training and education policy, plans, concepts, and programs for training in formal schools and detachments.

(2) Establish formal schools to satisfy Marine Corps-wide training and education requirements.

(3) Direct formal schools and detachments to develop programs of instruction that satisfy the training requirements identified in the ITS Order, T&R Manual, or CG, TECOM directive. When course development is directed other than via training standards, CG, TECOM will specifically define tasks to be trained.

(4) Conduct and review evaluations of training and education performed in the formal schools and resolve all issues.

(5) Determine priorities and allocate assigned resources to support valid formal school/detachment training and education requirements.

(6) Review the CDDs and POIs for all courses taught at Marine Corps formal schools/detachments. Review all equivalent course documents from other service schools and civilian courses to determine if they meet Marine Corps training requirements. (C 469/C 4610)

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

(8) Update as required and post the Marine Corps Formal Schools Catalog on the TIMS website. (C 4611)

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

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

(11) Assist schools with the use of MCAIMS for the development of the CDD and POI for each course of instruction, and for use in managing student and class data. (C 469)

(12) Conduct Curriculum Assistance Visits (CAV) for all Marine Corps formal schools and detachments. (C 469/C 4610)

(13) Maintain the IMSs to ensure instructors, curriculum developers, and school administrators are properly trained. (C 469)

(14) Consolidate and submit all costing data for formal school training and education in accordance with reference (s). (C 464)

(15) Coordinate Program Objective Memorandum (POM), Program Reviews and Financial Budget Plan data calls with formal schools and detachments for identification of funding requirements. (C 464).

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

(17) Develop distance-learning courseware for MOS training based on approved individual training standards or training and readiness events. (C 468)

(18) Assist schools with the use of BNA to maintain accountability of students in the training pipeline. (C 4611)

d. Commanding General, Training Command (TRNGCOM)

(1) Exercise command and operational control of all Marine Corps formal schools and training detachments.

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

(3) Review and approve all CDDs and POIs for formal school and detachment courses.

(4) Review, approve, and designate courses meeting HRT criteria set forth in this Order as "high risk" and include as changes to enclosure (8).

e. Commanding General, Education Command (EDCOM)

(1) Develop and maintain all Marine Corps resident and non-resident PME programs for all Marines in accordance with reference (s).

(2) As appropriate, manage the policies and administrative procedures for the application of the SAT and ORM processes in the PME schools.

(3) Review and approve CDDs and POIs for all PME courses.

f. Director, Safety Division, Headquarters Marine Corps

(1) Coordinate the participation of safety managers in periodic formal school inspections or curriculum assist visits with

base and station safety offices. These inspections or assist
visits will occur on a periodic basis not to exceed 3-year
intervals.

        (2) Maintain memorandum of understanding with the Commander,
Naval Safety Center (NAVSAFCEN) so required HRT safety surveys and
assist visits to all schools and detachments remain in place.
(Note: Safety assist visits differ from safety surveys in that
they render assistance pertaining to a specific safety problem vice
a complete safety overview. Assist visits may be requested as
required. These visits are at no cost to the requesting unit.)

        (3) Develop audit and risk assessment checklists and inspect
all HRT courses, listed in enclosure (8), on a periodic basis (not
to exceed three year intervals), for compliance with this Order,
references (g), (n), (o) and (p), and all other pertinent orders.

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

        (5) Upon request, assist the CG, TRNGCOM in assessing
nominated courses as HRT.

    g. Commander, Naval Safety Center (NAVSAFCEN)

        (1) Provide HRT program safety surveys and assist visits to
all schools and detachments listed in enclosure (8).

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

    h. Commanding Officers, Marine Corps Formal Schools and
Detachments

        (1) Submit the CDD and POI to CG, TECOM for review of all
new or revised formal courses of instruction. This submission must
be within 90 days of receipt of a new or revised ITS order/T&R
manual or TECOM approval of recommended changes to the course
submitted via the CCRB ROP. For courses taught at multiple
locations, the lead school will submit the CDD and POI within 120
days. For those courses of instruction conducted at other service
schools, submit equivalent course documentation. Requests for
extensions will be submitted to and approved by CG, TECOM (C 469/C
4610). Course revision is authorized when an updated CDD and POI,
along with a cover letter detailing the proposed changes, is

approved by CG, TECOM. Course revision can also be authorized via a formal approval letter from CG, TECOM.

(2) Submit the CDD and POI for each course taught via mobile training team (MTT) to the CG, TECOM (C 469/C 4610) for review, staffing, and approval.

(3) Assign all instructors, curriculum developers and school administrators to the appropriate IMS course within 90 days of their arrival at the school/detachment. Require all personnel to complete the required SAT and ORM DL courses prior to attending IMS resident instruction and submit the appropriate screening checklist (enclosures 1, 2, or 3) with nomination request.

(4) Provide professional development training for those civilian employees assigned to Marine Corps formal schools or educational institutions. Authorization for such training is established in the Government Employees Training Act (Public Law 85-507). Requests for quotas for civilian employees and subsequent seat assignments to Marine Corps formal courses of instruction will be coordinated through the Service Quota Managers, at CG, TECOM (C 4611). The training must be related to the individual's present or prospective responsibilities. Formal schools and detachments must budget for and fund civilian employee training.

(5) Maintain a MLF containing a Learning Analysis Worksheet (LAW), Learning Objectives Worksheet (LOW), ORAW, lesson plan (to include safety brief), student outline, supplemental student material, media, or a description of the media and its location, concept card(s), the Instructor Preparation Guide, and the appropriate MLF checklist for each lesson/event in accordance with reference (g). For those lessons containing Interactive Multimedia Instruction (IMI), a student and instructor guide for that portion of the lesson must also be maintained in the MLF.

(6) Maintain a copy of the following course documents: CDD, POI, ITS or T&R, CCRB ROPs, and course schedules.

(7) Request assistance from CG, TECOM (C 469/C 4610) for problem areas relating to the design, development, implementation, and evaluation of any course

(8) Submit validated student and class data (rosters, graduation reports, etc.), using the BNA system, within seven calendar days of course completion.

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

(10) Submit CDDs and POIs for Marine Corps courses taught at multiple locations, as separate MCAIMS produced documents via the lead school, to CG, TECOM under a single cover letter.

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

(12) Provide qualified Subject Matter Experts (SME) who can speak on the behalf of the formal school/detachment commander to participate in the development of Marine Corps training standards.

(13) Plan and conduct CCRBs on all courses every three years coordinating with the operating forces/supporting establishment for qualified SME participation.

(14) Make recommendations for changes to ITS orders/T&R manuals, or improvements to any Marine Corps training and education programs, to CG, TECOM (C 469/C 4610)

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

(16) Review all ORAWs annually and make required adjustments to the MLF.

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

(18) Investigate and report all training related mishaps in accordance with reference (t).

(19) Determine if a course meets the definition of HRT and submit a request for inclusion (to include rationale) to CG, TRNGCOM for approval.

 i. Commanding Officers, Marine Corps Formal Schools and Detachments Designated as HRT. In addition to the requirements listed in section h., the following specific responsibilities apply:

(1) Determine if a course is HRT and if not included in enclosure (8), submit a request for inclusion (to include rationale) to CG, TECOM for approval.

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

(3) Brief all students on CT procedures per enclosure (4).

(4) Verify that all high-risk instructor candidates are screened per enclosures (9) and (11).

(5) Designate a HRT Safety Officer (HRTSO) for oversight of all HRT events. See enclosure (12) for more information on the HRTSO.

(6) Ensure the HRTSO completes the Ground Safety for Marines course and the ORM DL course prior to assuming duties.

(7) Establish a schedule for the HRTSO to observe and evaluate all high-risk evolutions. See enclosure (9) for guidance.

(8) Investigate and report all training related mishaps in accordance with reference (t).

(9) Ensure HRT course prerequisites include safety considerations.

(10) Verify that students meet all course prerequisites prior to commencing training.

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

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

(a) Cease Training procedures were explained.

(b) Lessons on safety were included as applicable.

(c) Lessons related safety to job performance.

(d) Emergency action procedures were explained.

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

(f) Instructors followed all safety precautions.

(13) Conduct an annual safety review of all high-risk courses listed in enclosure (8).

(14) Establish an instructor proficiency evaluation program that evaluates high-risk instructors in the appropriate instructional environment (classroom and/or field) per enclosure (11).

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

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

(17) Request a periodic safety survey from the NAVSAFCEN (Code 48) for all courses listed in enclosure (8). The frequency of these surveys should not exceed three-year intervals. Direct liaison is authorized.

j. Instructors

(1) Complete the SAT and ORM DL courses and the FSIC.

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

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

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

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

k. High-Risk Training Safety Officers (HRTSO)

(1) Complete the Ground Safety for Marines and the ORM DL courses prior to assuming duties.

(2) Review all HRT evolutions annually.

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

(4) Notify the command's safety office of all mishaps to ensure mishap reporting and recording is initiated per reference (t).

l. HRT Instructors

(1) Complete the SAT and ORM DL courses and the FSIC.

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

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

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

(5) Assist the HRTSO in developing and reviewing the pre-mishap plan.

(6) Assist the HRTSO in completing the proper mishap report in the event of a mishap.

7. Applicability. This Marine Corps Order is not applicable to the Marine Corps Reserve.
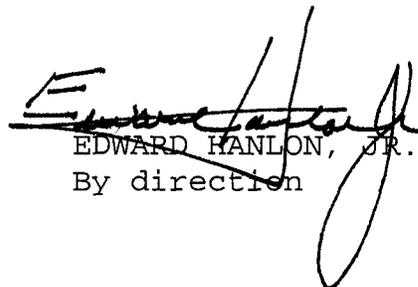
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             7230004 (20)
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From: Academics Officer (command name)
To: Director, Instructional Management School

Subj: NOMINATION OF _____ TO THE
        FORMAL SCHOOL INSTRUCTOR COURSE (CID_____CLASS #_____)
        ATTENDANCE CONFIRMATION AND CHECK-IN LIST

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

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

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

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

Print Name / Billet _____

Signature _____ Date _____

From: Academics Officer (command name)
To: Director, Instructional Management School

Subj: NOMINATION OF _____ TO THE
       CURRICULUM DEVELOPER COURSE (CID_____CLASS #_____)
       ATTENDANCE CONFIRMATION AND CHECK-IN LIST

Encl: (1) Test on effective writing. This enclosure will help determine the writing skills of your nominee.

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

CDC PREREQUISITES	YES	NO
Is proficient with Microsoft Word and PowerPoint.		
Has good written communication skills. See Encl (1)		
Has completed the MCAIMS tutorial. (Located on the GTB Web Site)		
Has completed the SAT IMI.		
Has completed the ORM IMI.		

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

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

Print Name / Billet _____

Signature _____ Date _____

From: Academics Officer (command name)
To: Director, Instructional Management School

Subj: NOMINATION OF _____ TO THE
          ADMINISTRATORS COURSE (CID_____CLASS #_____) ATTENDANCE
          CONFIRMATION AND CHECK-IN LIST

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

AC PREREQUISITES	YES	NO
1. Has completed the SAT IMI.		
2. Has completion the ORM IMI.		
3. Has a Master Lesson File from his/her school.		
4. Has a copy of his/her school's Academic SOP.		

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

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

Print Name / Billet _____

Signature _____ Date _____

FORMAL SCHOOL MANAGEMENT CHECKLIST

1. School personnel involved in instruction, curriculum development, and administration of instruction have completed the appropriate level course(s) of instructional training indicated below: (Paragraph 4.d.(1), MCO 1553.2A)

YESNO

_____   a. Returning instructors have completed Marine Corps or other service instructor course within the last 5 years.

_____   b. First time instructors have attended the Formal School Instructor Course (FSIC) at the Instructional Management School (IMS) within 90 days of joining the school.

_____   c. Curriculum developers have attended the CDC at IMS within 90 days of joining the school or being transferred to a developer's billet/duty.

_____   d. Administrators have attended the Administrator Course (AC) at IMS within 90 days of joining the school.

_____   e. Instructors who design and develop curriculum have attended both an instructor training course and the IMS CDC.

_____   f. All personnel have completed the SAT and ORM DL courses.

2. Each course has Course Descriptive Data (CDD) and a Program of Instruction (POI) approved by CG, TRNGCOM or has a CDD/POI submitted for approval. (Paragraph 4.c.(2).(g), MCO 1553.2A)

____ YES____ NO

3. The school is employing the current version of MCAIMS to produce a CDD/POI. (Paragraph 4.c.(2), MCO 1553.2A)

____ YES____ NO

FORMAL SCHOOL MANAGEMENT CHECKLIST

4. A formal CCRB is conducted for each course at least every three years. (Paragraph 4.e.(3), MCO 1553.2A and Chapter 5, SAT Manual)

_____ YES _____ NO

5. Each course has the following required documents on-hand: (Chapter 3, SAT Manual)

YES NO

___ ___ a. ITS/T&R Manual

___ ___ b. CDD/POI

___ ___ c. MLF(s)

___ ___ d. ROP

___ ___ e. Course Schedule

6. Each MLF contains, at a minimum, the following material: (Chapter 3, SAT Manual)

YES NO

___ ___ a. LAWs

___ ___ b. LOWs

___ ___ c. Lesson Plan

___ ___ d. Student Outline

___ ___ e. Supplemental Student Materials (if applicable)

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

___ ___ g. Concept Card(s)

___ ___ h. Completed ORAW

___ ___ i. Instructor Preparation Guide (IPG)

(LAWS and LOWS are not required for lesson purpose classes)

FORMAL SCHOOL MANAGEMENT CHECKLIST

7. The school has an established internal evaluation plan for student performance. (Paragraph 4.e.(2), MCO 1553.2A, Chapter 5, SAT Manual)

_____ YES_____ NO

8. The school has an established internal evaluation plan for course materials. (Paragraph 4.e.(2), MCO 1553.2A, Chapter 5, SAT Manual)

_____ YES_____ NO

9. The school has an established internal evaluation plan for instructor performance. (Paragraph 4.e.(2), MCO 1553.2A, Chapter 5, SAT Manual)

_____ YES_____ NO

10. The school has an established internal evaluation plan for instructional environment. (Paragraph 4.e.(2), MCO 1553.2A Chapter 5, SAT Manual)

_____ YES_____ NO

11. The school has an established plan for external evaluation. (Paragraph 4.e.(2), MCO 1553.2A, Chapter 5, SAT Manual)

_____ YES_____ NO

12. Class Convening Rosters for each class have been submitted through the By Name Assignment (BNA) system, to CG, MCCDC (C 4611) within 5 calendar days of the class beginning date. (Paragraph 5.g.(1), MCO 1553.7)

_____ YES_____ NO

13. Class Completion Rosters for each class have been validated through the By Name Assignment (BNA) system, to CG, MCCDC (C 4611) within 7 calendar days of the class and ending date. (Paragraph 5.g.(3), MCO 1553.7)

_____ YES_____ NO

FORMAL SCHOOL MANAGEMENT CHECKLIST

14. Class schedules for a course of instruction will be submitted via the TECOM Integrated Management System (TIMS) Scheduling Wizard by 1 June each year. (Paragraph 4.f.(2), MCO 1553.2A)

_____ YES_____ NO

15. The school has a Staff/Faculty Development Plan. (Paragraph 4.d.(4), MCO 1553.2A and Chapter 7, SAT Manual)

_____ YES_____ NO

16. The training schedule matches the CDD/POI. (Paragraph 4.c.(2).(k), MCO 1553.2A)

_____ YES_____ NO

17. The MLF matches the CDD/POI. (Paragraph 4.c.(2).(k), MCO 1553.2A)

_____ YES_____ NO

18. The CDD/POIs of courses taught at multiple locations match to the greatest extent possible i.e. learning objectives and course hours. (Paragraph 4.c.(2).(i), MCO 1553.2A)

_____ YES _____ NO

19. The course schedule contains, at a minimum, the following requirements: (Paragraph 4.c.(2).(k), MCO 1553.2A and Chapter 3, SAT Manual)

YES NO

_____ _____ a. Lesson Designators

_____ _____ b. Lesson Titles

_____ _____ c. Lesson Times

20. Training records are maintained on every faculty member (instructors, curriculum developers, and administrators). (Paragraph 4.d.(3), MCO 1553.2A)

_____ YES _____ NO

FORMAL SCHOOL MANAGEMENT CHECKLIST

21. Operational Risk Assessments have been conducted for every lesson/event in the POI. (Paragraph 5.a.(2), MCO 1553.2A)

_____ YES _____ NO

22. Each course has been reviewed to determine if it meets the requirements for designation as HRT. (Paragraph 5.b.(2), MCO 1553.2A)

_____ YES _____ NO

23. All HRT instructors have been screened per enclosures (9) and (11). (Paragraph 5.b.(3), MCO 1553.2A)

_____ YES _____ NO

FORMAL SCHOOL SEAT REQUIREMENT COORDINATING INSTRUCTIONS

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

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

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

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

15 Feb   C 4611 publishes & distributes the training input plan for next fiscal year [PFY+1]. Distribution is via Training Information Management System (TIMS) website.

15 May   Annual TIP conference for PFY+2. All sponsors in attendance.

1 Jun   Receive all class schedules from all schools for the
             next fiscal year [PFY+1].

15 Jul   Publish training quota memoranda (TQM) (class
             schedules and requirements) for next fiscal year
             [PFY+1].

4. **Execution**

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

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

    c.   For all MOS and individual course requirements, M&RA,
Occupational Field Managers and MARFORRES training specialists
must determine what their training requirements will be for the
present fiscal year plus one year, and make projections for the
following four out-years. We recognize that most Occupational
Field Managers and MARFORRES planners do not have the same
planning tools as the manpower planners at M&RA. However, they
must consider all issues that will impact the need for training
and provide their best-educated estimate of what is both
necessary and feasible. This is extremely important because the
TIP is the basis for budgeting and funding travel, per diem, and
school overhead costs; manpower requirements, in terms of
instructors, are also based on it. If we overestimate either
the need or availability of Marines to train, we may over-

obligate funds or program seats we won't use. On the other hand, if we underestimate our need, we will have to make special efforts to fund and obtain unplanned school seats. This process is especially critical with respect to other Service (Army, Navy, and Air Force) training. Often, our quotas to other Services' courses are tied to instructor and budget support. This support has been established by formal or informal agreements based on student throughput. If that throughput changes, we will be asked to increase our instructor and monetary support. Since it is extremely difficult to identify structure and money to compensate for non-programmed requirements, every possible effort must be made to ensure training requests are absolutely valid and supportable. Therefore, every available information source must be used to determine accurate training needs. Some, but not all, of the possible information sources are the Tables of Organization (T/O), the assignment monitors at M&RA (MMOA/MMEA), Marine Forces training coordinators, knowledge of upcoming changes (equipment, structure, mission, etc.), MCCDC (C 46), and MPP.

    d. When submitting requirements at the TIP conference, all submissions will be compared to the average of the last 3 years throughput, as reflected in the By Name Assignment (BNA) System. Any requirement submissions not justified by BNA throughput will be denied unless significant justification is provided.

5. **Training Input Plan Changes.** The training process is dynamic and requirements will inevitably change. Please remember the TIP is a planning document and actual training execution may vary. As changes occur during the course of each execution year the TQM, which identifies courses, classes, and student quotas, will be updated. The updated TQM will be loaded into the By Name Assignment System and the Training Information Management System Website (https://tims.tecom.usmc.mil). For this reason, TIMS and BNA are your primary sources for course, class, and quota information during the execution year.

6. **Requirements/Training Constraints.** The requirements listed in the TIP are the actual number of students who must be trained during the FY to meet USMC manning and MOS needs. Inability to meet the requirement degrades operational readiness and leads to a backlog of Marines awaiting training. Therefore, schoolhouses must strive to train to the stated requirement. Specifically, schoolhouses must endeavor to schedule their classes to provide sufficient capacity during each trimester in order to meet the requirement for that trimester (refer to TIP/TQM Reference Guide on the TIMS Website for a complete explanation of "Trimesters").

If a course of instruction's capacity is constrained and the requirement cannot be met, the schoolhouse must aggressively determine the nature of the constraint (instructors, facilities, equipment, billeting, funding, etc.) and immediately report it to the CG, Training Command (C 47).

7. **Validation Requirement.** On 1 October 96, the Marine Corps began using the By Name Assignment System (BNA) as the sole source of data to validate training utilization, training requirement estimates, and funding for training quotas. This means that C 4611 will measure course utilization for each year and compare it to the sponsors' stated formal training requirements for the year. By collecting this data, C 4611 will provide a measure of effectiveness for requirement planning and actual training execution. C 4611 will also use the data to justify our formal training requirements with the other services and in the budget process. To ensure we have accurate and timely information in BNA, it is absolutely essential that schoolhouses validate their class rosters in BNA upon graduation. Use of BNA is mandatory.

SCHOOL:

COURSE:

LESSON TITLE:

LESSON DESIGNATOR:

PREPARED BY:

DATE:

IDENTIFY HAZARDS			ASSESS HAZARDS	MAKE RISK DECISIONS		IMPLEMENT CONTROLS	SUPERVISE
List Learning Objective Behaviors	Sub-steps (If applicable)	List Hazards	Initial RAC	Develop Controls	Residual RAC	How to Implement	How to Supervise

Cease Training Criteria (CTC): (During training, instructors may identify other hazards that require a decision to CT.)

Approving Signature:

Date:

CEASE TRAINING (CT) PROCEDURES AND REQUIREMENTS

1. Ensure all students are briefed on CT policy and procedures prior to the start of any high-risk course (i.e., during the course indoctrination). Specific verbal and/or non-verbal CT signals shall be reviewed prior to commencing any high-risk evolution. For multi-day evolutions, CT procedures will be re-briefed prior to commencing each day's training. Evolution specific CT procedures should be put in place where needed. All procedures should be standardized (with the exception of evolution specific) throughout the course.

2. CT may be called when a student or instructor expresses concern for personal safety; when a student or instructor requires relief from pain, heat stress, or other serious physical discomfort; when the procedures/requirements need explanation; or in cases of potential damage to equipment.

3. Instructors must maintain situational awareness at all times and be alert to signs of student panic, fear, extreme exhaustion, or lack of confidence that might impair safe completion of the training evolution.

4. Following a CT call, the situation shall be examined and additional safety controls shall be put in place to allow safe resumption of training. Once the lead, on-scene instructor has fully reviewed the situation and put controls in place, he/she will make the decision to resume training, unless the school/ detachment SOP directs otherwise.

5. If a student refuses to participate in training after appropriate safety controls have been put in place, or excessively and inappropriately uses the CT call to disrupt training, that student shall be removed from training and referred for administrative processing, that may include permanent removal from the training program.

6. Instructors will document pertinent information (date, time, persons involved, equipment or facilities involved, conditions, situation, and out come) for every CT occurrence. The After-Instruction Report (AIR) is the recommended vehicle for documentation.

Enclosure (7)

CEASE TRAINING (CT) PROCEDURES AND REQUIREMENTS

7. Example of a CT brief:

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

Add amplifying information/procedures as needed.

HIGH-RISK TRAINING COURSES

MARINE CORPS FORMAL COURSES

East Coast

Quantico, VA:

M02GPR9BREACHER INSTRUCTOR COURSE
M02KAL9URBAN MOBILE BREACHER COURSE
M02M729BASIC BREACHER

Little Creek, VA:

N03AHK1BASIC RECONNAISSANCE COURSE

Camp Lejeune, NC:

M031302BASIC COMBAT ENGINEER
M0381KBCOXSWAIN SKILLS (CRRC/RRC)
M03ACC2COMBAT ENGINEER OFFICER
M03ACS2COMBAT ENGINEER NCO
M03H4JBSMALL BOAT COXSWAIN (RIVERINE) PHASE II

Dive School, Panama City, FL:

N20l6H1 MARINE CORPS COMBATANT DIVER COURSE

West Coast

Bridgeport, CA:

M24M7A1SUMMER MOUNTAIN LEADERS
M24M7B1WINTER MOUNTAIN LEADERS

EWTGPAC, Coronado, CA:

N30AHK1 BASIC RECONNAISSANCE COURSE

M&RA HIGH-RISK INSTRUCTOR PRE-ASSIGNMENT CHECKLIST

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

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

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

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

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

    e. Pass the PFT.

    f. Complete an instructor-training course prior to executing orders (or during delay en route). Courses are currently taught at Camp Lejeune (M03XRGA), Camp Pendleton (M10XAG1), and also by Mobile Training Teams from either of these bases (M03XRGM and M10XRGM). Personnel having successfully graduated from Navy Instructor Training School (receiving an NEC of 9502) are excluded.

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

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

STUDENT TYPE CODES

STUDENT_TYPE   DESCRIPTION

```
0E          ACTIVE DUTY ENLISTED
0E 3E       ACTIVE DUTY ENLISTED - MARFORRES
0E FL       ACTIVE DUTY ENLISTED - MARFORLANT
0E FP       ACTIVE DUTY ENLISTED - MARFORPAC
0E MT               ACTIVE DUTY ENLISTED - MOBILE TRNG TEAM
                    INSTRUCTOR
0EC         ACTIVE DUTY ENLISTED - CONVERSION TRAINING
0EE         ACTIVE DUTY ENLISTED - ENTRY LEVEL
0EF                 ENLISTED - ACTIVE RESERVE PROGRAM - RETRAINING
0O          ACTIVE DUTY OFFICER
0O 3O       ACTIVE DUTY OFFICER - MARFORRES
0O FL       ACTIVE DUTY OFFICER - MARFORLANT
0O FP       ACTIVE DUTY OFFICER - MARFORPAC
0O MT               ACTIVE DUTY OFFICER - MOBILE TRNG TEAM
                    INSTRUCTOR
0OE         ACTIVE DUTY OFFICER - ENTRY LEVEL
0OF         OFFICER - ACTIVE RESERVE PROGRAM -
                    RETRAINING
0W          ACTIVE DUTY WARRANT OFFICER
0W FL       ACTIVE DUTY WARRANT OFFICER - MARFORLANT
0W FP       ACTIVE DUTY WARRANT OFFICER - MARFORPAC
0W MT               ACTIVE DUTY WARRANT OFFICER - MOBILE TRNG TEAM
                    INSTRUCTOR
1E          ACTIVE DUTY ENLISTED - LATERAL MOVE
1O          ACTIVE DUTY OFFICER - LATERAL MOVE
2E          RESERVE ENLISTED - IADT
2E2         RESERVE ENLISTED - IIADT
3E          RESERVE ENLISTED - SMCR
3E MT               RESERVE ENLISTED - MOBILE TRAINING TEAM
                    INSTRUCTOR
3EM         RESERVE ENLISTED - MARFORRES
3O          RESERVE OFFICER - SMCR
3O MT               RESERVE OFFICER - MOBILE TRAINING TEAM
                    INSTRUCTOR
3O OO       RESERVE OFFICER - MARFORRES - CAREER COURSE
3OM         RESERVE OFFICER - MARFORRES
3W          RESERVE WARRANT OFFICER - MARFORRES
4E          ARMY ENLISTED
4O          ARMY OFFICER
5E          NAVY ENLISTED
5O          NAVY OFFICER
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STUDENT TYPE CODES

STUDENT_TYPE   **DESCRIPTION**

STUDENT_TYPE	DESCRIPTION
6E	AIR FORCE ENLISTED
6O	AIR FORCE OFFICER
7E	COAST GUARD ENLISTED
7O	COAST GUARD OFFICER
8	CIVILIAN
8D	CIVILIAN - DOD
8N	CIVILIAN - NON DOD
9E	FOREIGN ENLISTED
9O	FOREIGN OFFICER

FORMAL SCHOOL HIGH-RISK TRAINING (HRT) INSTRUCTOR PROGRAM

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

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

2. <u>Commanding Officer's Interview</u>

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

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

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

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

1. Personnel will be required to demonstrate their technical competency, teaching techniques, and application of ORM per their commanding officer's requirements. These evaluations shall be conducted by the academics chief and reviewed by the

commanding officer or his designated representative (assigned in writing). A record of these evaluations shall be on file in the individual's training record. The following signed entry will be made in the individual's SRB/OQR:

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

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

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

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

De-certification

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

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

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

DEFINITIONS AND PROCEDURES

1. **High-Risk Training (HRT)** is defined in the formal school
setting as: Basic or advanced individual or collective training,
essential for preparing Marines and units for combat, that exposes
students and instructors to the risk of death or permanent
disability despite the presence and adherence to proper safety
controls. Enclosure (8) is a list of courses designated as HRT.

2. **Formal training** is defined as training (consisting of formal
courses of instruction) conducted by Marine Corps formal schools,
detachments and training centers and depots. It may also encompass
other formal schools and training centers whose curriculum falls
under MCCDC's cognizance and/or review. Formal courses are
identifiable by assigned course identification (CID).

3. **Operational Risk Management (ORM)** is the process of dealing
with risks associated with military operations. It includes risk
assessment, risk decision-making and implementation of risk
controls. All formal HRT courses will incorporate ORM in their
planning and execution in accordance with reference (n) to ensure
safe training that also provides the realism needed to fulfill
Marine Corps requirements.

4. **Pre-Mishap Plan** is to be implemented in the event of a mishap.
A Pre-Mishap Plan shall be developed for all HRT evolutions and
shall include (at a minimum) the following: procedures for
summoning medical and other appropriate emergency response teams;
locations of first aid kits, fire extinguishers, and any other on-
site emergency equipment; procedures for emergency operation/
shutdown of training equipment; backup communications procedures;
sequential listing of personnel to be notified; and any other data
as appropriate. All reasonable scenarios shall be anticipated and
Standard Operating Procedures (SOP) developed to cope accordingly.
The Pre-Mishap Plan shall be posted or otherwise available to all
personnel at each HRT site. Students will be briefed on the Pre-
Mishap Plan prior to commencing training. The plan will be
reviewed upon completion of each course cycle.

5. A **safety review** is a comprehensive review of HRT to ensure
courses are being taught with minimum risk to personnel. The
safety review shall include the application of Operational Risk
Management (ORM), review of training mishap data, near misses,

curriculum, instructional techniques, and safety requirements
incorporated within the course curriculum. Particular attention

shall be paid to any course changes or modifications (physical,
technical, and procedural) that may impinge on the overall safety
posture. Safety reviews will be conducted on an annual basis,
documented, and a report submitted to the Commanding Officer.

6. The **High-Risk Training Safety Officer (HRTSO)** is an SNCO/
officer or civilian employee designated (in writing) by the
Commanding Officer and responsible for the oversight of all HRT.

7. A **High-Risk Instructor** is an individual certified to instruct
the high-risk portions of any course. Must be a graduate of the
Formal Schools Instructor Course (FSIC) and hold a CPR, or higher
lifesaving certification. Personnel currently assigned to this
duty (or assigned within a period of time not to exceed six months
after the effective date of this Order), who do not meet these
requirements, are exempted. See enclosure (8) for requirements.

8. A **Cease Training (CT)** signal is a verbal and/or non-verbal
signal that has been agreed upon. It must be an easily remembered
and easily recognized signal. The signal will be briefed to all
students prior to commencing high-risk evolutions and posted in the
immediate vicinity (if feasible). The signal is used to
temporarily cease all training when, in the opinion of the
signaler, a hazard exists that is likely to cause death of serious
injury. See enclosure (7) for details on CT procedures.