STANDARD OPERATING PROCEDURES (SOP)

FOR

THE COAST GUARD'S TRAINING SYSTEM

Volume 13

PROFESSIONAL DEVELOPMENT FOR

- INSTRUCTORS
- INSTRUCTIONAL DESIGNERS
- MASTER TRAINING SPECIALISTS
- PERFORMANCE ANALYSTS
- PERFORMANCE CONSULTANTS
- TRAINING MANAGERS
- TRAINING SUPERVISORS

Training Division (FC-T)

Coast Guard Force Readiness Command

March 2018

Table of Contents

References

The following references were used in the creation of this volume of the training system (TRASYS) standard operating procedure (SOP).

- Richey, R. (2004). *Instructional Design Competencies: The Standards* (3rd ed.). Syracuse**,** NY: Education Resources Information Center (ERIC) Clearinghouse on Information and Technology.

- [U.S. Coast Guard TRASYS SOP Vol. 2: Analysis](#)

- [U.S. Coast Guard TRASYS SOP Vol. 3: Evaluation](#)

- [U.S. Coast Guard TRASYS SOP Vol. 4: Job Aids](#)

- [U.S. Coast Guard TRASYS SOP Vol. 5: Resident Instruction](#)

- [U.S. Coast Guard TRASYS SOP Vol. 6: Curriculum Outline](#)

- [U.S. Coast Guard TRASYS SOP Vol. 8: Non-Instructional Performance Support](#)

- [U.S. Coast Guard TRASYS SOP Vol. 9: Performance Qualification Guide](#)

Section I: Introduction

Background

This SOP promulgates the Coast Guard's competencies required by the seven Coast Guard professional training billets:

1. Instructors
2. Instructional designers
3. Master training specialists
4. Performance analysts
5. Performance consultants
6. Training managers
7. Training supervisors

This SOP lists each task which personnel must perform to become qualified when a billet mandates qualification.

This SOP is intended to apply only to Coast Guard active duty and civilian personnel; however the qualifications in this SOP may also be mandated as prerequisites to hiring contracted personnel.

Competencies and Copyright

To ensure qualifications are transferable, competencies for each qualification level are applicable at any Coast Guard training command; however, units may add local job qualification requirements (JQR) as necessary. Unit-level requirements should be used sparingly and reviewed annually.

This SOP contains reprinted competencies and performance standards for instructors, instructional designers and training managers with permission of the [International Board of Standards for Training, Performance, and Instruction](#) (IBSTPI). Permission was granted in 2004.

The term "certified performance technologist" is used with permission of the [International Society for Performance Improvement](#) (ISPI).

Instructors

Instructors are Coast Guard officers, enlisted personnel and civilians who are responsible for:

- Implementing lesson plans in various training environments.
- Managing all aspects of the learning environment, including environmental factors, activities, testing, etc.

Instructional Designers

Instructional designers (IDs) are assigned to complete the various tasks involved in the design, development and evaluation of our training programs. Being an instructor is not a prerequisite for being an instructional designer. Instructional designers are responsible for:

- Choosing appropriate learning activities;
- Developing unit lesson plans;
- Designing and conducting training evaluations; and
- Designing and developing advanced distributed learning products.

Master Training Specialists

Master training specialists (MTS) are instructors who have achieved a level of excellence above and beyond that of the basic instructor by:

- Updating and improving their professional knowledge and skills;
- Communicating the instructional design process; and
- Evaluating instructional effectiveness.

Master training specialists are often relied upon to provide subject matter expertise to instructional design projects. They also play a key role as advisors, mentors and role models for Coast Guard instructors.

Performance Analysts

Performance analysts are responsible for conducting many kinds of analyses for the training system to provide data driven recommendations that continually improve Coast Guard member's performance. The U.S. Coast Guard performance analyst qualification and professional development process is based on the ISPI certification.

Performance Consultants

Performance consultants are responsible for facilitating the integration of organizational improvement principles and practices into Coast Guard work. They employ methodologies (such as systems theory, individual development instruments, group-dynamics and intervention design) and skills to assist with the design and conduct of workshops, off-site conferences, seminars and other organizational improvement projects.

Training Managers

Training managers (TMs) are individuals responsible for:

- Developing and monitoring a budget for Coast Guard training programs and attaining their resource requirements (staffing and capital);

- Developing and managing course curriculum outlines and all requirements therein; and

- Acting as a liaison between Coast Guard Headquarters program managers and the training system.

Training Supervisors

Training supervisors are responsible for overseeing all aspects of training for their respective branch, department or training center. A successful training supervisor will become fully immersed with the human performance cycle and will use it to ensure the delivery of valid, reliable and quality training to the learners.

Competency Waivers

Members seeking competencies for their official record must comply with this SOP. A waiver may be requested via memo to Chief, FORCECOM Training Division with a list of positions held, years assigned and primary duties for each position.

Section II: Instructors

Introduction

Instructors have the majority of contact with learners in the resident training environment and are critical to the success of the training system. Instructors are primarily responsible for implementing learning activities; however they may also assist in other training management efforts.

A standardized instructor qualification program ensures a thorough and expedient training process for personnel assigned to instructor billets. Additionally, it allows an instructor from one training command to be recognized as an instructor upon transfer to another training command.

This section provides guidelines for basic instructor professional development to be incorporated at all training commands.

Instructor Competency

The U.S. Coast Guard instructor qualification and professional development process is based on the instructor core competencies published by the [International Board of Standards for Training, Performance, and Instruction](#) (IBSTPI) and pertains to anyone not qualified within the previous 5 years. After 5 years, previously qualified instructors must recomplete phases III, IV and V of the qualification process to recertify. In addition, members seeking the instructor competency who are not currently assigned to a USCG Training Center must submit their request in writing to Chief, FORCECOM Training Division.

Qualification Process

This competency is to be awarded by the Training Center Training Officer. The goal for instructors is to qualify within 6 months of their arrival. Prospective instructors must qualify within 1 year of reporting.

Instructors must complete all qualification requirements before school and branch chiefs can consider them for qualification.

A five-phase program has been established to facilitate qualification consistency:

- Phase I: Instructor completes the IDC or approved alternate requirement.
- Phase II: Instructor completes the instructor personnel qualification standards (PQS).

- Phase III: Instructor received a minimum of three satisfactory instructor evaluations from different evaluators. The member's school chief (or equivalent) must complete the third and final evaluation.
- Phase IV: Instructor completed additional school or branch chief requirements (e.g., subject matter content, techniques or methods of instruction).
- Phase V: Chain of command recommends qualification and designates instructor via a memo.

Phase I: IDC

The school chief must submit an electronic training request to the Training Quota Management Center to schedule the prospective instructor to attend IDC within 3 months of an instructor reporting aboard. Previous completion of IDC negates this requirement.

Phase II: PQS

Each instructor PQS task includes a list of the associated performance criteria. These performance criteria are observable and measurable actions. Successful completion indicates competence in the task. A qualified instructor must initial each block of the PQS completion form. The PQS tasks are listed in detail following the completion form.

Phase III: Instructor Evaluations

A qualified instructor must complete an instructor feedback form (IFF) during actual classroom presentations. Prospective instructors must receive at least three satisfactory evaluations. Instructor evaluations are considered "satisfactory" when all core competency performances are marked "met."

Outcomes after completing required tasks are:

- Does not meet (defines performance below the standard of an instructor); or
- Meets (defines the minimum standard of an instructor).

The intent of the evaluation process for prospective instructors is to provide feedback, using a development plan, to track instructional performance. This is especially effective if conducted on subsequent evaluations on the same subject.

Phase IV: Additional School Chief Requirements

School and branch chiefs must ensure prospective instructors are competent in subject content. Prospective instructors may be required to complete additional requirements as deemed necessary by school chiefs and/or policy requirements. Additional Requirements will be documented in the Unit's Organizational Manual and/or SOP.

These additional requirements may include, but are not limited to:

- Specific training methods used in particular schools, such as role playing;
- Table-top exercises and oral and in-basket scenarios; and
- Operation and safety requirements of training aids/equipment used during a course of instruction.
- The school chief must forward the following documents to the branch chief/training officer (TO) for signature:
- A qualification memo to the member stating he or she has successfully completed all qualification requirements;
- A completed instructor PQS;
- A completed unit job qualification requirements (JQR)/school chief performance requirements (if applicable); and
- Three required instructor evaluations.

Once signed, the branch chief or TO must provide a copy of the qualification letter to the Servicing Personnel Office (SPO) for assignment of the "PERJC" competency code per the U.S. Coast Guard Competency Management System Manual, COMDTINST M5300.2 (series).

Maintaining Instructional Skill

Qualifying as an instructor does not mark the end of individual instructor development. All Coast Guard instructors must maintain their instructional skills and pursue higher skill development. Instructors must be evaluated annually by a master training specialist, section chief or equivalent to ensure instruction skills are maintained.

Inability to Qualify as an Instructor

School chiefs must follow the guidance in Military Assignments and Authorized Absences Manual, CIM1000.8A, article 1.E.4., Reassigning Members Unsuited for Special Duty, when prospective instructors fail to qualify within 1 year of their arrival.

Instructor PQS Task List

The PQS task list contains detailed information about the criteria for instructor qualification. .Each criteria item must be initialed by a qualified instructor in order for that task to be considered complete.

Instructor PQS Completion Form

Name:_____ **Unit:**_____

Use this page as a record of satisfactory completion of designated sections of the instructor performance qualification standards (PQS). Only specified supervisors, by observation of performance, may signify completion of sections. The performance of each task should be signed at completion of the task and not as a whole. In addition to the assigned school house PQS, the instructor candidate must receive a positive endorsement on a <u>minimum</u> of three instructor feedback forms (IFFs), which are located at the end of this chapter (one by a qualified instructor, one by a master training specialist and a final one by the assigned school/course chief). Each instructor candidate must be able to demonstrate their proficiency in Coast Guard approved instructional methods and the course material.

Once a candidate has completed all PQS requirements for the instructor (PERJC) competency, recommend designation as an instructor per Force Readiness Command Training Division Standard Operating Procedure (SOP) for the Coast Guard's Training System, Vol. 13: Professional Development.

Supervisor

RECOMMENDED_____ DATE_____

Comments:

School Chief/Course Chief

RECOMMENDED_____ DATE_____

Comments:

Branch Chief/Division Officer/Training Officer

RECOMMENDED_____ DATE_____

Comments:

Commanding Officer or Designated Representative

QUALIFIED_____ DATE_____

Comments:

SERVICE RECORD ENTRY_____ DATE_____

Name:_____ Unit:_____

Division/Branch:_____ Date Reported:_____

Signature Verification for Instructor Qualification

Date	Name	Signature	Unit/School

Remarks:

Task 1: Communicate effectively

Performance Criteria	Completed (initials)	Date
a. Vary pitch, tone, inflection and rate of speech		
b. Use appropriate spelling, grammar, punctuation and language for students' levels of understanding		
c. Use hand gestures and body motions to enhance the teaching points		
d. Use eye contact appropriately and effectively		
e. Maintain a comfortable distance from students		
f. Use pauses appropriately to allow for student reflection and comprehension		

Task 2: Plan instructional methods and materials

Performance Criteria	Completed (initials)	Date
a. Plan or modify instruction to accommodate for students' experiences		
b. Personalize lesson plans to check for understanding		
c. Select (or adapt) instructional methods, strategies and presentation techniques to accommodate learning strategies		
d. Adapt lesson plans to accommodate different instructional settings		
e. Create and publish the course agenda for students		
f. Sequence the lesson plan in a logical order		

Task 3: Prepare for instruction

Performance Criteria	Completed (initials)	Date
a. Rehearse lesson plan timing with another qualified instructor		
b. Make all necessary resources, supplies, and reference materials available to students		
c. Confirm logistical arrangements and equipment readiness prior to a class convening		

Performance Criteria	Completed (initials)	Date
d. Ensure the environment is set up and conducive to learning		
e. Test equipment operation and functionality prior to a class convening		
f. Eliminate (or minimize) internal and external distractions that prohibit learning and limit performance		
g. Provide a safe and clean learning environment		

Task 4: Comply with established ethical and legal standards

Performance Criteria	Completed (initials)	Date
a. Respect a student's rights to confidentiality and anonymity in safeguarding personal information		
b. Avoid conflicts of interest with the staff and students		
c. Respect and comply with intellectual property laws		

Task 5: Establish and maintain professional credibility

Performance Criteria	Completed (initials)	Date
a. Conform to Coast Guard uniform standards (or appropriate civilian attire)		
b. Demonstrate subject matter expertise		
c. Recognize and acknowledge mistakes and provide opportunities to correct them		

Task 6: Stimulate and sustain learner motivation and engagement

Performance Criteria	Completed (initials)	Date
a. Match learning outcomes (expectations) to student and course goals		
b. Plan (and deliberately use) feedback and positive reinforcement during delivery of instruction		
c. Use stories, analogies and examples to gain and sustain student attention		

Task 7: Manage an environment that fosters learning and performance

Performance Criteria	Completed (initials)	Date

	Completed (initials)	Date
a. Introduce oneself, co-instructors and students at the beginning of the course (if necessary)		
b. Present clear expectations and ground rules for learning and interaction		
c. Address undesirable behavior effectively, appropriately and timely		
d. Resolve student conflicts appropriately and timely		
e. Manage group-paced and individual participation		
f. Manage instructional time effectively and avoid digressions		
g. Provide a positive learning environment for all students		

Task 8: Demonstrate effective presentation/facilitation skills

Performance Criteria	Completed (initials)	Date
a. Use a lesson plan to deliver instruction		
b. Present key ideas and concepts in a variety of ways		
c. Provide examples to clarify meanings or teaching points		
d. Involve students in presentations using discussion, questions and reflection		
e. Use examples, anecdotes, stories, analogies and humor to reinforce teaching points		
f. Use props and teaching aids effectively and appropriately		

Task 9: Use instructional methods appropriately

Performance Criteria	Completed (initials)	Date
a. Implement a variety of training methods		
b. Manage the group dynamics associated with each method		
c. Employ training techniques appropriate to methods and training situations prescribed		

Task 10: Use media and technology to enhance learning and performance

Performance Criteria	Completed (initials)	Date

Performance Criteria	Completed (initials)	Date
a. Use visual aids that support the objective(s) and teaching points		
b. Use visual aids that are simple, and easy to read and understand		
c. Incorporate the use of job aids, handouts or other printed materials in the learning environment		
d. Incorporate different media to appeal to all learning strategies		
e. Establish a contingency plan in the event media fails during instruction		

Task 11: Demonstrate effective questioning techniques

Performance Criteria	Completed (initials)	Date
a. Ask clear and relevant questions		
b. Promptly follow up on student questions and concerns		
c. Use a variety of question types and deliver at various levels		
d. Direct and redirect questions effectively		
e. Build responses to questions in current (or subsequent) learning environments		
f. Repeat, rephrase and restore questions from students		
g. Provide positive reinforcement to student responses		
h. Provide opportunities to involve all students in discussions		

Task 12: Provide clarification and feedback

Performance Criteria	Completed (initials)	Date
a. Provide clear, timely, relevant, and specific feedback		
b. Provide opportunities for students to request clarification to teaching points		
c. Assist students in giving and receiving feedback		
d. Provide feedback targeted to the performance (not to the student)		
e. Promote peer-to-peer feedback		

Task 13: **Promote retention and transfer**

Performance Criteria	Completed (initials)	Date
a. Encourage students to elaborate on concepts and ideas		
b. Provide opportunities to integrate new knowledge and practice new skills		
c. Provide opportunities for reflection, review and self-guided learning		
d. Provide opportunities to practice in realistic settings		

Task 14: **Assess learning and performance**

Performance Criteria	Completed (initials)	Date
a. Communicate assessment criteria to students		
b. Monitor individual and group performance during practice and assessment		
c. Provide students with opportunities for self-assessment		
d. Assess student performance outcomes		
e. Provide opportunities for remediation		

Instructor Feedback Form

Instructor Name:	Evaluator Name:
Signature:	Signature:

Course/Lesson Title:	**Go:** ☐	**No-Go:** ☐

Date:	Start/Stop Time: _____/_____	**Purpose:** ☐ PERJC ☐ Annual/Semi ☐ MTS Recommendation ☐ Other:

Rating Measures	Action Required by the Instructor
Exceeds = Demonstrated mastery, could serve as a model for this component.	Consider mentoring colleagues who seek improvement.
Meets = Demonstrated competency.	Seek ways to incorporate all instructor competencies.
Does not meet = Demonstrated some competency but needs improvement / Did not demonstrate at all.	Focus on improving per recommendations / Seek assistance & make improvements per recommendations.

Provide detailed feedback and recommendations on various areas of the instructor's performance.

+ = Positive Performance   **Δ** = Improvement Needed

+ Δ	PLANNING & PREPARATION	☐Meets ☐Exceeds ☐Does not meet
____ ____	**Plans Instructional Methods and Materials (#2)**: Plans or modifies instruction to accommodate for students' experiences. Personalizes lesson plan and checks for understanding. Lesson plan follows logical sequence. Selects (*or adapts*) instructional methods, strategies and presentation techniques to accommodate learning strategies. Adapts lesson plan to accommodate different instructional settings (*content still delivered as designed*). Creates and publishes course agenda for students. **Prepares for Instruction (#3):** Rehearses lesson plan timing with another qualified instructor. Makes all necessary resources, supplies and reference materials available to students. Confirms logistical arrangements and equipment readiness prior to class convening. Ensures environment is set up and conducive to learning. Tests equipment for operation and functionality prior to class convening. Eliminates (or minimizes) internal and external distractions that prohibit learning and performance. Provides a safe and clean learning environment.

Comments:

+	Δ				
		PROFESSIONAL FOUNDATIONS	☐Meets	☐Exceeds	☐Does not meet

Communicates Effectively (#1): Varies pitch, tone, inflection and rate of speech. Uses proper spelling, grammar, punctuation, and language that fit the students' level of understanding. Uses hand gestures and body motions to enhance the teaching points. Uses eye contact appropriately and effectively. Maintains a comfortable distance from students. Uses pauses appropriately to allow for student reflection and comprehension.

Complies with Ethical and Legal Standards (#4): Respects student rights to confidentiality and anonymity in safeguarding personal information. Avoids conflicts of interest with the staff and students. Respects and complies with intellectual property laws.

Establishes and Maintains Professional Credibility (#5): Conforms to Coast Guard Uniform Standards (*or appropriate civilian attire*). Demonstrates subject-matter expertise. Recognizes and acknowledges mistakes and provides opportunity to correct them.

Comments:

+	Δ				
		MANAGEMENT	☐Meets	☐Exceeds	☐Does not meet

Manages an Environment that Fosters Learning and Performance (#7): Introduces oneself, co-instructors, and students at the beginning of the course (*if necessary*). Presents clear expectations and ground rules for learning and interaction. Addresses undesirable behavior effectively, appropriately and timely. Resolves student conflicts appropriately and timely. Manages group-paced and individual participation. Manages instructional time effectively and avoids digressions. Provides a positive learning environment for all students.

Uses Media & Technology to Enhance Learning (#10): Uses visual aids that support the objective(s) and teaching points. Uses visual aids that are simple and easy to read and understand. Incorporates the use of

		job aids, handouts, or other printed materials in the learning environment. Incorporates different media to appeal to all learning strategies. Establishes a contingency plan in the event media fails during instruction.	

Comments:

+	Δ	**INSTRUCTIONAL METHODS & STRATEGIES**	☐Meets ☐Exceeds ☐Does not meet
		Stimulates and Sustains Learner Motivation and Engagement (#6): Matches learning outcomes (*expectations*) to student and course goals. Plans and deliberately uses feedback and positive reinforcement during delivery of instruction. Uses stories, analogies, and examples to gain and sustain student attention.	
		Demonstrates Effective Presentation / Facilitation Skills (#8): Uses a lesson plan to deliver instruction. Represents key ideas and concepts in a variety of ways. Provides examples to clarify meaning or teaching points. Involves students in presentations for discussion, questions, and reflection. Uses examples, anecdotes, stories, analogies, and humor to reinforce teaching points. Uses props and teaching aids effectively and appropriately.	
		Uses Instructional Methods Appropriately (#9): Implements a variety of training methods. Manages the group dynamics associated with each method. Employs training techniques appropriate to prescribed methods and training situations.	
		Demonstrates Effective Questioning Techniques (#11): Asks clear and relevant questions. Promptly follows up on student questions and concerns. Uses a variety of questions types and delivered at various levels. Directs and redirects questions effectively. Builds responses to questions in current (or subsequent) learning environments. Repeats, rephrases and restructures questions from students. Provides positive reinforcement to student responses. Provides opportunity to involve all students in discussions.	
		Provides Clarification and Feedback (#12): Provides clear, timely, relevant, and specific feedback. Provides opportunities for students to request clarification on teaching points. Assists students in giving and receiving feedback. Provides feedback targeted to the performance (and <u>not</u> the student). Promotes peer-to-peer feedback.	

	Promotes Retention and Transfer of Skills (#13): Encourages students to elaborate concepts and ideas. Provides opportunities to integrate new knowledge and practice new skills. Provides opportunities for reflection, review and self-guided learning. Provides opportunities to practice in realistic settings.	

Comments:

+ Δ	**ASSESSMENT & EVALUATION**	☐Meets ☐Exceeds ☐Does not meet
	Assesses Learning and Performance (#14): Communicates assessment criteria to students. Monitors individual and group performance during practice and assessment. Provides students with opportunities for self-assessment. Assesses student performance outcomes. Provides opportunities for remediation.	

Comments:

INSTRUCTOR'S REACTIONS AND ACTION PLAN

FOLLOWING A MENTORING CONVERSATION WITH THE EVALUATOR, what are your opportunities for improvement?

Competency #	Opportunities for Improvement

Sample Qualification Memo

Below is a sample instructor qualification memo.

U.S. Department of Homeland Security

United States Coast Guard

Commanding Officer
U.S. Coast Guard
Training Center
Yorktown

Yorktown, VA 23690-5000
Staff Symbol: xyz
Phone: (757) 856-xxxx
Fax: (757) 856-xxxx

SSIC
dd mmm yyyy

Memorandum

From: F. M. Last, RANK, USCG
        CG TRACEN Yorktown (xyz)

To: N. instructor, RANK, USCG

Subj: INSTRUCTOR QUALIFICATION

Ref: (a) Coast Guard's Training System Standard Operating
        Procedure (SOP) Vol. 13: Professional Development
        (b) U.S. Coast Guard Competency Management System
        Manual, COMDTINST M5300.2 (series)

1. Congratulations! You have met all of the requirements of reference (a) and are hereby designated a qualified Coast Guard Instructor. You are entitled to be assigned the "JC" competency code in accordance with reference (b). I wish you continued success in your development as a training professional. Semper Paratus!

#

Copy: Training Record

Section III: Instructional Designers

Introduction

The abilities of instructional designers are essential to the quality of training and the successful transfer of skills and knowledge to the learner. Regardless of the delivery media, the underlying instructional approach and materials must be competently designed to close performance gaps or take advantage of new opportunities.

Instructional designers are expected to examine the results of performance analyses and develop instructional solutions to performance issues that are caused by a lack of knowledge or skills. The Coast Guard has a standardized professional development program in place to support these instructional design efforts.

Instructional Designer Competencies

The U.S. Coast Guard instructional designer qualification and professional development process are based on 22 core competencies published by the IBSTPI.

Qualification Process

The Training Center Training Officer or FORCECOM-Training Branch Chief awards the instructional designer competency. A member must complete the FORCECOM Instructional Designer Competency Attestation form for two instructional design projects completed IAW FORCECOM SOP 5, 6 and 7 to receive the competency. In addition, at his or her discretion, the Training Center Training Officer or FORCECOM-Training Branch Chief will convene a portfolio review board consisting of members at his or her command.

Instructional Designer Competency List

FORCECOM Instructional Designer
Competency Attestation

Consultant Name:	
Project Name:	
Year Work Completed:	
Project Description:	
Your Role:	

Standard 1: Communicate effectively in visual, oral and written form

1. How did you use visual communications to facilitate stakeholder involvement?

2. How did you use oral communications to facilitate stakeholder involvement?

3. How did you use written communications to facilitate stakeholder involvement?

Standard 2: Apply current research and theory to the practice of instructional design

1. What instructional design and/or learning theories did you apply?

2. Describe your use of instructional design and/or learning research throughout this project.

Standard 3: Update and improve one's knowledge, skills and attitudes pertaining to instructional design and related fields

1. What efforts did you make to continue your professional development and designer proficiency during this project?

Standard 4: Apply fundamental research skills to instructional design projects

1. Describe the methodologies you used to collect and report data and information in support instructional design process.

Standard 5: Identify and resolve ethical and legal implications of design in the workplace

1. What ethical challenges did you have to overcome during this project?

2. What legal implications did you address throughout the development of your instructional products?

Standard 6: Develop courses of action following a performance analysis

1. Describe your role in guiding the selection of instructional solutions following a Front End Analysis or Job Task Analysis.

Standard 7: Design a curriculum or program

1. How did you contribute to the development of the curriculum outline?

Standard 8: Select and use a variety of techniques for determining instructional content

1. What techniques did you select?

2. How did you apply these techniques during the selection of learning content?

Standard 9: Identify and describe target population characteristics

1. How did you identify the target population?

2. What were the characteristics of the population?

3. How did you use those characteristics to guide your instructional design decision making?

Standard 10: Analyze the characteristics of the environment

1. Describe your analysis of the physical environment.

2. Describe your assessment of the social environment.

3. Describe your evaluation of the cultural environment.

Standard 11: Analyze the characteristics of existing and emerging technologies and their use in an instructional environment

1. What existing and/or emerging technologies did you integrate into the learning?

2. How did these technologies enhance motivation, visualization, interaction, simulation and individualization?

Standard 12: Reflect upon the elements of a situation before finalizing design solutions and strategies

1. What challenges did you experience during this project?

2. How did you overcome those challenges?

Standard 13: Select, modify, or create a design and development model appropriate for a given project

1. What instructional design models did you consider?

2. Which model did you select? Why?

Standard 14: Select and use a variety of techniques to define and sequence the instructional content and strategies

1. Describe the media and delivery systems used for this instruction, including your rationale for selection.

2. Describe the instructional strategies used for this instruction, including your rationale for selection.

3. Describe the evaluation strategy used for this instruction, including your rationale for selection.

Standard 15: Select or modify <u>existing</u> instructional materials

1. How did you evaluate, select, and integrate the reuse of existing instructional materials?

2. What methods did you use to identify sources for new instructional materials?

Standard 16: Develop instructional materials

1. Describe how, and with whom, you developed instructional materials.

Standard 17: Design instruction that reflects an understanding of the diversity of learners and groups of learners

1. How did you address cultural differences in the design of the instruction?

2. How did you accommodate different learning strategies in the design of the instruction?

Standard 18: Evaluate and assess instruction and its impact

1. Describe the formative evaluation plan.

2. Describe the summative evaluation plan.

Standard 19: Plan and manage instructional design projects

1. What project management strategies did you use to keep the instructional design on schedule, on budget and meeting quality standards?

Standard 20: Promote collaboration, partnerships and relationships among the participants in a design project

1. Who were the primary stakeholders during the project? What were their roles and responsibilities?

2. What strategies did you use to promote collaboration and partnerships?

Standard 21: Apply business skills to managing instructional design

1. Describe the strategic relationship between the instructional design product and organizational goals and objectives.

2. Describe the business case that justified the selected design solution in lieu of other potential solutions.

Standard 22: Design instructional management systems

1. How did you leverage management systems to track student progress and document completion of learning?

Standard 23: Provide for the effective implementation of instructional products and programs

1. What change management tools did you use to promote the new instructional solution?

2. What processes did you use or put in place to ensure continuous assessment and improvement of the design product?

Sample Qualification Memo

Below is a sample instructional designer qualification memo.

U.S. Department of Homeland Security		
United States Coast Guard	Commanding Officer U.S. Coast Guard Training Center Yorktown	Yorktown, VA 23690-5000 Staff Symbol: xyz Phone: (757) 856-xxxx Fax: (757) 856-xxxx

SSIC
dd mmm yyyy

Memorandum

From: F. M. Last, RANK, USCG
        CG TRACEN Yorktown (xyz)

To: I. Designer, RANK, USCG

Subj: INSTRUCTIONAL DESIGNER QUALIFICATION

Ref: Coast Guard's Training System Standard Operating
        Procedure (SOP) Vol. 13: Professional Development

1. Congratulations! You have met all of the requirements of SOP Vol. 13 and are hereby designated as a qualified Coast Guard instructional designer. This is a significant accomplishment and a clear indication of your commitment to our Service. You are entitled to be assigned the "JI" competency code. I wish you continued success in your development as a training professional. Semper Paratus!

<div align="center">#</div>

Copy: Training Record

Section IV: Master Training Specialists

Introduction

Master Training Specialists are instructors who have achieved a level of excellence above and beyond that of the basic instructor by:

- Updating and improving their professional knowledge and skills

- Communicating the instructional design process

- Evaluating instructional effectiveness

Master Training Specialists often provide subject matter expertise to instructional design projects. They also play a key role as advisors, mentors and role models for Coast Guard instructors; they set the example of professional decorum and loyalty to the Coast Guard Training System.

Qualification Process

The Training Center Training Officer is responsible for awarding this competency. The Coast Guard seeks to build the skills, behaviors and capacities of their professional educators. The Master Training Specialist designation is one way to recognize outstanding individual effort and foster greater command training professionalism. All aspiring Master Training Specialists must achieve this designation via the four-phase program path which includes: evaluation, nomination, completion of the performance qualification standards (PQS) and Master Training Specialist oral board before attaining the recommendation.

Any member submitting for this competency who is not currently assigned to a USCG Training Center must submit their request to Chief, FORCECOM Training Division.

Prerequisites

Members desiring this qualification must complete the Instructor Development Course (IDC) and have achieved their PERJC (Instructor qualification — JC competency code) prior to being recommended.

Phase I: Evaluation

Phase I consists of receiving a satisfactory evaluation that is recorded on the Instructor Feedback Form (IFF) and conducted by a Master Training Specialist from outside the candidate's department. All competencies must receive a grade of "meets" or "exceeds." The evaluator comments section of the form must contain positive statements that recommend Master Training Specialist designation.

Phase II: Nomination

A branch chief or equivalent must nominate the prospective Master Training Specialists via memo prior to the member commencing the program. An example of a nomination memo can be found at the end of this section.

Phase III: PQS Completion

The candidate must complete the PQS to build his or her knowledge of training. These PQS items include a more in-depth look at instructional concepts as well as how the Training System functions to support the delivery of training. By completing these PQS items, the MTS candidate will:

- Have a more in-depth knowledge of the creation of instruction.
- Improve courses by performing evaluations and request changes.
- Fine tune their abilities and mentor others in instructional skills through professional workshops.
- Have in-depth knowledge in regulations regarding instructors and instructional media, methods and guides.
- Have supplementary knowledge to assist students in the learning process.

The candidate can find the information for completing the PQS tasks from U.S. Coast Guard Force Readiness Command's (FORCECOM) Training Systems (TRASYS) Standard Operating Procedures (SOP), Commandant Instructions (COMDTINST) and Training Center (TRACEN) policies.

Once completed, the PQS tasks must be captured in a 3-ring binder with a table of contents and each item tabbed. The binder must also include an IDC certificate of attendance, a memo and proof of the PERJC competency code.

Phase IV: MTS Oral Board and Recommendation

The command Master Training Specialist Board will be comprised of three personnel: the designated command Master Training Specialist Coordinator (Chairperson) and two additional Master Training Specialist competency code holders.

The Master Training Specialist Board will verify the completeness of each candidate's package before the coordinator schedules an oral board. At the board, each board member will ask a series of four questions from any

Master Training Specialist task contained in the Coast Guard's TRASYS SOPs or other applicable Coast Guard training materials.

Each board member will score candidates per question on a scale of 1 to 5 for a maximum of 20 points per interviewer (60 possible points). Nominees must score a minimum of 45 total points to pass the board.

The Master Training Specialist Board will forward its recommendation for final approval to the Training Officer (TO). The Master Training Specialist qualification will be documented in a qualification memo to the member. An example of a qualification memo can be found at the end of this section.

Personnel who do not satisfy the requirements during the command Master Training Specialist Board must undergo a 30-day remediation period before requesting another oral board.

Candidate Qualification Process

The majority of the Master Training Specialist's PQS items can be signed off by any Master Training Specialist. Some items need to be signed off by the Master Training Specialist Coordinator to ensure consistency in how those items are completed. The following steps are required to expedite the Master Training Specialist candidate's qualification process.

- The candidate should ensure he or she is receiving a signature from a Master Training Specialist that is current in his or her knowledge of the SOP and active in the Master Training Specialist Program.

- Master Training Specialist PQS item regarding IFFs must be completed on a block of instruction from an instructor guide that contains all six activities. A total of 10 IFFs must be completed. Each IFF must be evaluated by the Master Training Specialist Coordinator prior to submitting the next one to ensure improvement. The last IFF should not need improvement.

- The candidate should attend all possible Master Training Specialist workshops, trainings and meetings coordinated by the Master Training Specialist Coordinator.

- The remaining items will be signed by the Master Training Specialist Coordinator or a designee appointed by the Training Officer

- If a candidate has not qualified within 12 months of entering the program their candidacy will be reviewed by the Master Training Specialist Coordinator.

- Above all, the candidate must be proactive, as the Master Training Specialist qualification process is self-paced.

Note: Workshop items are covered in the following block.

Workshop Items

The TRACEN Master Training Specialist Coordinator will establish a series of professional development (pro-dev) workshops that will require the candidate to produce and deliver instruction.

The MTS candidate will be provided a topic in which he or she will produce and deliver a pro-dev workshop on the topic as a "teach back" to other MTS candidates. MTS candidates may be paired up on a topic and deliver the instruction as a team. MTS candidates will be assigned a topic regarding an aspect of the training system (a candidate may propose an topic to be approved by the Training Officer, this topic should be one that covers an aspect of the training system).

(1) The ADDIE Process

(2) Kirkpatrick's 4 Levels of Evaluation

(3) Instructor Feedback Forms (IFF)

(4) Classroom Observations

(5) Curriculum Change Requests

(6) Other training system topic approved by MTS coordinator

The candidate will initially be given a topic and will produce one workshop; this workshop will contain the items required in tasks 2, 3, and 12-14 of the Instructor PQS. These tasks lead the candidate through the creation of an instructor guide, student guide and all needed material. Once complete the candidate will then swap materials with another candidate.

Note: The candidates swapping must have different topics. This allows them to be more knowledgeable in at least two of the designated workshop items.

The two candidates must work together to ensure materials to be presented are understandable.

The MTS candidate will present his or her topic during a pro-dev workshop day facilitated by the Master Training Specialist Coordinator. Once completed, the Master Training Specialist candidate will also receive sign-offs for the other workshops in the PQS that he or she attends during the workshop day.

Note: MTS Candidates must attend at least three of the five MTS pro-dev workshops to successfully complete this PQS sign-off.

To reiterate, a candidate will need to create materials for only one of the workshop items and instruct on another topic.

Master Training Specialist Coaches

Coaches will be designated by the Master Training Specialist Coordinator and perform several duties:

- Meet with the candidate to discuss his or her assigned topic.
- Guide the candidate in creating his or her instructor guide and student guide for certain topics.
- Approve the instructor guide and student guide and any materials prior to the candidate swap.
- Assist the Master Training Specialist Coordinator with management, development and performance of the Master Training Specialist Board and Master Training Specialist Program.
- Be a point of contact for the candidate.
- Monitor the candidate throughout the qualification process and development workshops.
- Provide the Master Training Specialist Coordinator with recommended updates/changes to the program.

Master Training Specialist Coordinator

The Master Training Specialist Coordinator will be designated by the TO to serve a minimum of one year. The coordinator will perform the following:

- Lead the Master Training Specialist Board
- Be responsible for the management, development and effective performance of the Master Training Specialist Board and Program
- Schedule regular Master Training Specialist meetings and hot washes
- Schedule and coordinate Master Training Specialist workshops
- Monitor candidates throughout the qualification process
- Provide necessary training to candidates
- Forward Master Training Specialist board recommendations to the Commanding Officer via the TO
- Schedule and coordinate presentation ceremonies

- Work with the TO and Performance Systems Branch/Division (PSB/PSD) to coordinate instructor development workshops
- Designate Master Training Specialist coaches
- Monitor currency of Master Training Specialist certification
- Nominate a successor when relieved of duty

Previously Qualified Master Training Specialists

All newly transferred personnel who have previously completed the Master Training Specialist qualification will have their certification reviewed by the Master Training Specialist Coordinator before becoming an active member of the Master Training Specialist Program.

Previously qualified Master Training Specialists need to:

- Notify the Master Training Specialist Coordinator of their interest to become part of the MTS program
- Receive a favorable IFF from a Master Training Specialist
- Resubmit their Master Training Specialist binder for review by the Master Training Specialist Coordinator

Upon completion of the listed requirements the Master Training Specialist Coordinator may add that member to the current active roster.

Retaining Qualification

The following must be performed to maintain a status of Master Training Specialist:

- Receive a favorable annual IFF
- Conduct five annual IFFs on qualified instructors
- Conduct and submit at least two Classroom Observations per year.
- Submit at least two Curriculum Change Requests on courses within the instructor's specialty, or assigned area of responsibility per year.
- Provide guidance for Master Training Specialist candidates and maintain knowledge of the program in order to assist in signing off PQS items.
- Perform professional development training in support of the Master Training Specialist Coordinator, TO and PSB/PSD
- Assist the Master Training Specialist Coordinator when needed

If a Master Training Specialist is unable to complete any of the items, the TO and Master Training Specialist Coordinator will assess each case and determine whether appropriate to remove the Master Training Specialist from the program. Removal from the program will be documented in a memorandum signed by the TO.

Note: The PERJD competency code remains in the member's training record even if he or she is removed from the program.

Nomination Memo

Below is a sample of a memo nominating a candidate for the Master Training Specialist Program.

U.S. Department of Homeland Security

United States Coast Guard

Commanding Officer
U.S. Coast Guard
Training Center
Yorktown

Yorktown, VA 23690-5000
Staff Symbol: xyz
Phone: (757) 856-xxxx
Fax: (757) 856-xxxx

SSIC

dd mmm yyyy

Memorandum

From: F. M. Last, RANK, USCG *{Branch Chief}*
         CG TRACEN Yorktown (xyz)

To: Command Master Training Specialist Board

Thru: Command Master Training Specialist Coordinator

Subj: NOMINATION FOR MASTER TRAINING SPECIALIST PROGRAM

Ref: a) Coast Guard's Training System Standard Operating
            Procedures (SOP) Vol. 13: Professional Development

        b) U.S. Coast Guard Competency Management System
            Manual, COMDTINST M5300.2 (series)

1. _____has demonstrated exemplary instructional proficiency and is nominated to participate in the Master Training Specialist qualification process.

#

FIRST ENDORSEMENT

From: I. M. Coordinator, RANK, USCG *{Master Training Specialist Coordinator}*
         CG TRACEN Yorktown (xyz)

To: Command Master Training Specialist Board

Subj: NOMINATION FOR MASTER TRAINING SPECIALIST PROGRAM

1. Forwarded for consideration.

#

Qualification Memo

Below is a sample Master Training Specialist qualification memo.

U.S. Department of
Homeland Security

United States
Coast Guard

Commanding Officer
U.S. Coast Guard
Training Center
Yorktown

Yorktown, VA 23690-5000
Staff Symbol: xyz
Phone: (757) 856-xxxx
Fax: (757) 856-xxxx

SSIC

dd mmm yyyy

Memorandum

From: F. M. Last, RANK, USCG
        CG TRACEN Yorktown (xyz)

To: M. T. Specialist, RANK, USCG

Subj: MASTER TRAINING SPECIALIST QUALIFICATION

Ref: Coast Guard's Training System Standard Operating
        Procedures (SOP) Vol. 13: Professional Development

1. Congratulations! You have met all of the requirements of SOP Vol.
   13 and are hereby designated a qualified Coast Guard Master
   Training Specialist. This is a significant accomplishment and a clear
   indication of your commitment to our Service. I wish you continued
   success in your development as a training professional. Semper
   Paratus!

                                    #

Copy: Training Record

Qualification Checklist

The table below shows the Master Training Specialist qualification checklist.

Required Workshops/Courses/Topics		Date Completed/Initials
Prerequisites	Attended and passed the Instructor Development Course (IDC)	
	Became Instructor qualified; PERJC competency code issued	
Phase I	Received a positive IFF by a Master Training Specialist outside the candidate's department	
	Received a recommendation to become a candidate in the Master Training Specialist Program	
Phase II	Nominated by a branch chief for participating in the Master Training Specialist Program	
Phase III	Completed the Master Training Specialist personnel qualification standards checklist	
	Facilitated a Master Training Specialist workshop **Workshop:**	
	Mentored a new instructor **Name:**	
Phase IV	Attended and passed a Master Training Specialist Board	
	Received a signed MTS qualification memo	

A list of Master Training Specialist PQS items is presented in the following tables.

PQS List

Competency 1. Mentorship

		Performance Statement	Completed (Initials)	Date
	1-1	Advise an instructor on the functions of the FORCECOM Training Division, including the Operations Training Branch (FC-Tot), and the Mission Support Branch (FC-Tms) as it pertains to Coast Guard Training and the instructional design process.		
	1-2	Advise an instructor on the different phases of the ADDIE process and how it relates to Coast Guard Training and the instructional design process.		
	1-3	Advise an instructor on the contents of a Coast Guard resident course curriculum outline.		
	1-4	Advise an instructor on how Curriculum Change Requests for instructional materials are routed for approval.		
	1-5	Attend at least three of the five MTS professional development		

Competency 2. Evaluation

		Performance Statement	Completed (Initials)	Date
	2-1	Evaluate 10 instructor's performance using the Coast Guard's Instructor Feedback Form (IFF); providing clear, informative, and valuable performance feedback. (See Instructor Competency in		
	2-2	Explain the routing procedures for the Instructor Feedback Form (IFF)		
	2-3	Conduct five classroom observations using the Classroom Observation Checklist.		
	2-4	Explain the routing process for the Classroom Observation Checklist.		
	2-5	Complete five Curriculum Change Requests for instructional material (instructor guide, student guide, instructional media, job aids) using the Curriculum Change Request Form.		
	2-6	Explain the routing process for the Curriculum Change Request		
	2-7	Explain the Kirkpatrick Model and the four levels of training evaluation		

Competency 3. Design.

	Performance Statement	Completed (Initials)	Date
3-1	Develop a job aid for your workshop topic.		
3-2	Develop an instructor guide for your workshop topic.		
3-3	Develop a student guide for your workshop topic.		
3-4	Develop instructional media (visuals, PowerPoint presentations, handouts and other training aids) for your workshop topic.		

Section V: Performance Analysts

Introduction

Performance analysts are responsible for conducting many kinds of analyses for the training system. These analyses produce data that help form recommendations to continually improve a Coast Guard member's performance and keep pace with the changes to the Coast Guard's current world of work. The Coast Guard performance analyst qualification and professional development process is based on the [International Society for Performance Improvement](#) (ISPI) model.

Qualification Process

This competency is awarded by the Training Center Training Officer of Director of the Performance Technology Center applicants must submit their request for designation, via memo, through their chain of command. This memo must include evidence of the completion of all requirements listed below through a narrative within the request memo.

- Served as the lead analyst or co-analyst on at least three FORCECOM analyses projects per [Coast Guard's Training System Standard Operation Procedure Vol. 2: Analysis](#)
- Completed analyses using at least three of the six analyses methodologies contained in Vol. 2: Analysis
- Provided completed analysis reports

Members with the ISPI certified performance technologist (CPT) certification will automatically be awarded the competency; however, they must still submit a memo requesting designation and provide evidence of their CPT certification.

Qualification Memo

Below is a sample qualification memo.

U.S. Department of Homeland Security

United States Coast Guard

Commandant
United States Coast
Guard

2703 Martine Luther King Jr. Ave SE
Washington, DC 20593-7900
Staff Symbol: FC-Txxx
Phone: (757) 856-xxxx
Fax: (757) 856-xxxx
SSIC
dd mmm yyyy

Memorandum

From: F. M. Last, RANK, USCG   Reply to
                                        Attn of:

To: CG FORCECOM (FC-T)

Thru: Chain of Command

Subj: REQUEST FOR PERFORMANCE ANALYST (PRFANLST)
        COMPETENCY DESIGNATION

Refs: a) Coast Guard's Training System Standard Operating
           Procedures (SOP) Vol. 13: Professional Development
        b) U.S. Coast Guard Competency Management System
           Manual, COMDTINST M5300.2 (series)

1. I have met all applicable requirements within references (a) and (b) to obtain a PRFANLST competency.

2. The following is evidence to support the request:

    a) Served as (lead analyst or co-analyst) on three Force Readiness Command (FORCECOM) analysis projects per SOP Vol. 2: Analysis. Analyses included (list completed analyses).

    b) Completed analyses using at least three of the six analyses methodologies contained in SOP Vol. 2: Analysis, to include a new performance planning (NPP) front end analysis (FEA), cost comparison analysis (CCA), and strategic needs assessment (SNA).

    c) Provided completed reports for these analyses. Copies of the reports are located at (provide link(s) to reports).

    d) I have obtained the International Society for Performance Improvement (ISPI) certified performance technologist (CPT) certification (enclosure).

                            #

Enclosures:

_____

Section VI: Performance Consultants

Introduction

Performance consultants are responsible for facilitating the integration of organizational improvement principles and practices into Coast Guard work. They employ methodologies (e.g., systems theory, individual development instruments, group dynamics and intervention design) and skills to assist with the design and conduct of workshops, off-site conferences, seminars and other organizational improvement projects.

Qualification Process

The Training Center Training Officer or FORCECOM-Training Branch Chief awards this competency. Applicants must submit their request for designation via memo through their chain of command. This memo must include evidence of completion of all requirements. The evidence can be captured through attached enclosures or, when not possible or practicable, through a narrative within the request memo. A sample memo for requesting performance consultant designation is located at the end of this section.

The process leading to the awarding of the performance consultant competency includes:

- Serving as a FORCECOM consultant during at least one performance improvement project that complies with FORCECOM Training System SOPs

- Maintaining a substantial role in each phase of the performance improvement project, including analysis, design, development, implementation and evaluation (ADDIE)

- Completing the FORCECOM performance consultant competency attestation form

- Providing completed work products for each phase of the performance improvement project

Members with the International Society for Performance Improvement (ISPI) certified performance technologist (CPT) will automatically be awarded the competency once they provide evidence of the certification and submit a memo requesting the performance consultant designation.

**FORCECOM
Performance
Consultant
Competency
Attestation
Form**

The Performance Consultant Competency Attestation form is used during the qualification process. It must be included when submitting the designation request memo.

FORCECOM Performance Consultant Competency Attestation

Consultant Name:	
Project Name:	
Year Work Completed:	
Project Description:	
Your Role:	

Standard 1: Focus on Results or Outcomes

1. Describe what you did to ensure your clients and stakeholders were focused on the desired results or outcomes.

Standard 2: Take a Systemic View

1. Describe what you did to ensure your clients and stakeholders took a systemic view. Include at least three of the following: society, marketplace, workforce, workplace, work and worker.

Standard 3: Add Value

1. Describe what you did to add value.

Standard 4: Work in Partnership with Clients and Stakeholders

1. Describe what you did to facilitate a collaborative relationship with the clients and stakeholders. You may create a table listing the clients and stakeholders (by position/title) you partnered with throughout the project. One option is to include the role of the position/title on the project, how you partnered with him or her throughout the project and the impact each partnership had on the program's results or outcomes.

Standard 5: Determine Need or Opportunity

1. How did you define and scope the project?

2. What performance level(s) did you investigate and why? Include at least three of the following: society, marketplace, workforce, workplace, work and worker.

3. What was your data sampling strategy?

4. What data collection and analysis methods did you use?

5. Describe how the methods supported the purpose of the investigation.

6. Describe the goal of the project in measurable terms.

7. What performance deficiencies or unmet opportunities did you discover?

Standard 6: Determine Cause

1. How did you determine the underlying causes?

2. What cause(s) did this analysis uncover for each performance gap?

Standard 7: Design Solutions to Include Implementation and Evaluation

1. How did you design the solutions as they relate to the outputs of standards 5 (determine need or opportunity) and 6 (determine cause)?

2. How did you plan to implement the designed solutions?

3. How did you plan to evaluate the designed solutions?

Standard 8: Ensure Conformity and Feasibility of all Solutions

1. How did you ensure the solutions conformed to the design specifications during development?

2. How did you ensure the feasibility, workability, adoption or success of the solutions during development?

Standard 9: Implement Solutions

1. What implementation strategies were developed to allow clients to sustain change?

2. What methods did you use to track or monitor the new behaviors or changes during implementation?

3. What methods did you use to sustain new behavior or changes?

Standard 10: Evaluate Results and Impact

1. How was the impact of the solution measured in terms of a change in results or outcomes on individual, team, or organizational performance as identified in standard 5 (determine need or opportunity)?

2. How was ongoing evaluation integrated into a performance sustainment and/or continuous improvement strategy?

Qualification Memo

Below is a sample performance consultant qualification memo.

U.S. Department of Homeland Security

United States Coast Guard

Commandant
United States Coast Guard

2703 Martine Luther King Jr. Ave SE
Washington, DC 20593-7900
Staff Symbol: FC-Txxx
Phone: (757) 856-xxxx
Fax: (757) 856-xxxx
SSIC
dd Mmm yyyy

Memorandum

From: F. M. Last, RANK, USCG   Reply to
                                          Attn of:

To: CG FORCECOM (FC-T)

Thru: Chain of Command

Subj: REQUEST FOR PERFORMANCE CONSULTANT (PRFCNSLT)
        COMPETENCY DESIGNATION

Refs: a) Coast Guard's Training System Standard Operating
            Procedures (SOP) Vol. 13: Professional Development
        b) U.S. Coast Guard Competency Management System
            Manual, COMDTINST M5300.2 (series)

1.   I have met all applicable requirements within references (a) and (b)
     to obtain the PRFCNSLT competency.

2.   The following is evidence to support the request:

     a. Served as a FORCECOM consultant during at least one
     performance improvement project that complied with FORCECOM
     Training System SOPs.

     b. Maintained a substantial role in each phase of the performance
     improvement project, including analysis, design, development,
     implementation and evaluation (ADDIE).

     c. Completed the FORCECOM performance consultant competency
     attestation form and provided completed work products for each
     phase of the performance improvement project.

                                   #

Enclosures:

Section VII: Training Managers

Introduction   Training mangers are responsible for providing guidance, oversight and direction to U.S. Coast Guard Headquarters program managers regarding the training system and U.S. Force Readiness Command (FORCECOM) policies and procedures. In addition, training mangers provide:

- Consulting,

- Initiate analyses,

- Guide the use of non-training interventions; and

- Align resources to optimize human performance.

Qualification Process   Applicants must submit their request for designation via a memo FORCECOM-Training Branch Chief. This memo must include evidence of completion of all requirements listed below. The evidence can be captured through attached enclosures or, when not possible or practical, through narrative within request memo.

Performance criteria are outlined in the Training Manager PQS List. The items on this checklist must be signed by an FC-T branch chief or equivalent and be included as an enclosure with the designation request memo.

Training Manager PQS List

Performance Criteria	Completed (initials)	Date
1. Is assigned as a Coast Guard Force Readiness Command (FORCECOM) training manager		
2. Complete at least **two** fiscal year (FY) quota builds		
3. Complete the following change requests (**three** of each) • Create convening • Quota transfer • Change convening offset • Quota offset • Delete convening • Update course profile • Request additional quotas		
4. Review at least **five** curriculum outlines routed for FORCECOM Training Division (FC-T) approval		
5. Participate in at least **three** triennial reviews		
6. Participate in at least **three** Level 3 evaluation discussions		
7. Review at least **one** statement of work for contracted training		
8. Review at least **one** resources proposal for training funding or resources		
9. Attend at least **three** FORCECOM Business Operations Division (FC-B) "A" school meetings		
10. Participate as a member of a rating training advisory council (RTAC) for at least 1 year **or** participate in at least one rating performance qualification (RPQ) development prior to the Enlisted Rating Advancement Training System (ERATS)		
11. Validate all "C" School Total Quality Management System (TQMS) data for an assigned training portfolio		
12. Assist at least three program managers in obtaining new and/or additional resources for emerging training needs		
13. Attend a Prioritization Planning Meeting		
14. Review a Request for Analysis		
15. Review a Request for Development		

Qualification Memo

Below is a sample training manager qualification memo.

U.S. Department of Homeland Security

United States Coast Guard

Commandant
United States Coast
Guard

2703 Martine Luther King Jr. Ave SE
Washington, DC 20593-7900
Staff Symbol: FC-Txxx
Phone: (757) 856-xxxx
Fax: (757) 856-xxxx

SSIC
dd mmm yyyy

Memorandum

From: F. M. Last, RANK, USCG

Reply to
Attn of:

To: CG FORCECOM (FC-T)

Thru: Chain of Command

Subj: REQUEST FOR TRAINING MANAGER (PERJE) COMPETENCY DESIGNATION

Refs: a) Coast Guard's Training System Standard Operating Procedures (SOP) Vol. 13: Professional Development

        b) U.S. Coast Guard Competency Management System Manual, COMDTINST M5300.2 (series)

1. I have met all applicable requirements within references (a) and (b) to obtain the training manager (PERJE) competency. Enclosure (1) includes my completed training manager competency job qualification requirements (JQR).

    a) I request designation as a training manager (PERJE) per reference (a).

                                #

Enclosures: (1) Training manager PQS

Section VIII: Training Supervisors

Introduction

The Coast Guard training supervisor qualification process and professional development process are based on seven core competencies created by a panel of Coast Guards training experts. A training supervisor is typically a branch chief at a major training center, assistant training officer (TO) or a commanding officer (CO)/ executive officer (XO) of a regional fisheries training center; however, anyone who can prove competence through the required qualification process is not prohibited from applying.

As an organization, the Coast Guard seeks to build the skills, behaviors and capacities of professional educators. The training supervisor designation is one way to recognize outstanding individual effort and foster greater command training professionalism. It is strongly recommended that all personnel in a training supervisory position achieve the training supervisor designation via the prescribed path listed in the next block.

Qualification Process

This competency is to be awarded by the Training Center Training Officer or FORCECOM-Training Branch Chief. The qualification process for achieving the training supervisor qualification involves three phases.

1. Phase I: Serve as a training supervisor for at least 1 year.

2. Phase II: Complete the training supervisor personnel qualification standards (PQS), and if applicable, the training supervisor job qualification requirements (JQR).

3. Phase III: Receive recommendation by the training supervisor's chain-of-command.

Upon completion of the required period of service and applicable PQS/JQR, the supervisor of the prospective training supervisor will forward a qualification memo up the chain-of-command for signature.

Personnel Qualification Standards (PQS)

Each training supervisor PQS task has observable and measurable actions. Successful completion indicates competence in the task.

These competencies can only be signed off by personnel designated by the TO.

Task 1:   **Describe the responsibilities of the Coast Guard Force Readiness Command (FORCECOM) divisions and program managers**

References: FORCECOM Web site

Performance, Training, and Education Manual (PTEM), COMDTINST M1500.10D

Performance Criteria	Completed (initials)	Date
a. Describe the responsibilities of each FORCECOM division		
b. Describe the responsibilities of a program manager that are related to the candidate's course of instruction		
c. Describe the management of advanced training (Triangle — PTEM, p. 2-1)		
d. Describe the funding control codes used for training and education		
e. Locate the Training System (TRASYS) standard operating procedures (SOPs) and PTEM on the CG Portal		
f. Describe the Coast Guard's philosophy on training, education and workforce development		

Task 2: **Describe the Coast Guard's performance system (Instructional Systems Design (ISD) model and Human Performance Technology (HPT) techniques)**

References: PTEM, COMDTINST M1500.10D
Training System (TRASYS) SOPs

Performance Criteria	Completed (initials)	Date
a. Describe the difference between resident training, nonresident training, mess deck training, on-the-job-training and exportable training		
b. Describe the HPT model and how it applies to the Coast Guard		
c. Describe the analysis process: • Request for analysis (RFA) • Approval • Funding • Who does the analysis		
d. Describe the function of each of the analysis types: • Review an analysis from the Performance Technology Center (PTC) analysis library		
e. Describe the four levels of evaluation		
f. Describe the ADDIE (analysis, design, development, implementation, evaluation) model		
g. Describe the purpose of job aids		
h. Describe the purpose of non-instructional interventions		
i. Describe several advanced distributed learning (ADL) interventions and how they should be used		
j. Define high-risk training		

Performance Criteria	Completed (initials)	Date
k. Describe the duties of the following training positions: • Training officer (TO) • Performance Systems Branch (PSB) chief • Judge advocate general (JAG) • Instructor • Master training specialist • Course chief • Instructional systems designer (ISD) • ADL specialist • Technical writer • Subject matter expert (SME) • Accomplished performer (AP) • Performance technologist • Training specialist • Graphic designer • Instructional systems specialist • Education service officer (ESO) • Professional development coach (PDC)		
l. Advocate and use non-instructional solutions when appropriate		
m. Use evaluation data to enhance the quality of training and performance solutions		
n. Explain the American Council on Education (ACE) accreditation process and identify courses that have ACE credits in his or her area of responsibility		

Task 3: Maintain a resident course of instruction

References: PTEM, COMDTINST M1500.10D
TRASYS SOPs

Performance Criteria	Completed (initials)	Date
a. Fill out and submit a course request form		
b. Given a real or simulated situation, complete a course assessment process (CAP) • Complete a CAP checklists • Complete a classroom observation checklist		
c. Submit a curriculum change notice (CCN)		
d. Approve or disapprove a CCN		

Performance Criteria	Completed (initials)	Date
e. Describe the training functions of each of the following (per SOP Vol. 5: Resident Instruction, chapter 9): • Administration • Staff • Development • Delivery		
f. Complete a course evaluation using appendix Z in SOP Vol. 5: Resident Instruction		
g. Maintain and schedule training facilities and equipment		

Task 4: Perform the duties of a project manager

Reference: SOP Vol. 5: Resident Instruction, chapter 2

Performance Criteria	Completed (initials)	Date
a. Manage a project		
b. Develop a plan of action and milestones (POAM)		
c. Lead a "kick-off" meeting		
d. Conduct a project wrap up meeting		
e. Create and build teams to meet project goals		
f. Cultivate a sense of ownership within project teams		
g. Identify and minimize the effects of internal barriers on achieving project goals		

Task 5:   Manage training materials

Performance Criteria	Completed (initials)	Date
a. Review and explain the purpose of a curriculum outline		
b. Approve training materials		
c. Complete a pilot course implementation form (PCIF) and pilot course evaluation report (PCER)		

Task 6: **Manage student performance**

Performance Criteria	Completed (initials)	Date
a. Participate in an academic review board		

Task 7: **Manage staff development**

Performance Criteria	Completed (initials)	Date
a. Deliver a professional development workshop that engages and persuades staff		
b. Develop staff members to enhance their professional skills and the training function		

Qualification Memo

Below is a sample training supervisor qualification memo.

U.S. Department of Homeland Security — United States Coast Guard	Commandant United States Coast Guard	2100 Second St. S.W. Martin Luther King Jr. Ave SE Washington, DC 20593-0001 Staff Symbol: CG-13xy Phone: (202) 267-xxxx Fax: (202) 267-xxxx

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Memorandum

From: F. M. Last, RANK, USCG

To: T. Manager, RANK, USCG (FC-T)

Subj: TRAINING SUPERVISOR QUALIFICATION

Refs: Coast Guard's Training System Standard Operating
        Procedures (SOP) Vol. 13: Professional Development

1. Congratulations! You have met all of the requirements of SOP Vol. 13 and are hereby designated a qualified Coast Guard training supervisor. This is a significant accomplishment and a clear indication of your commitment to our Service. I wish you continued success in your development as a training professional. Semper Paratus!

#

Copy: Training Record

Qualification Checklist

The table below shows the training supervisor qualification checklist.

Required Workshops/Courses/Topics		Date Completed/Initials
Phase I	Complete 1 year of duties as a training supervisor	
Phase II	Complete training supervisor personnel qualification standards (PQS) and unit job qualification requirements (JQR)	
Phase III	Receive chain-of-command recommendation	
	Receive signed qualification memo	

UNITED STATES COAST GUARD

FORCE READINESS COMMAND