

United States Army Sergeants Major Academy (USASMA) Instructor/Facilitator Certification Program (ICP)



The Army School System (TASS)

This program applies to the Active Army (AA), Army National Guard (ARNG), and US Army Reserve (USAR) agencies responsible for institutional training of NCO Professional Military Education (PME) courses.

The US Army Sergeants Major Academy is the proponent for the Instructor/Facilitator Certification Program (ICP) for the following NCO Professional Military Education (PME) courses: Warrior Leader Course (WLC), Sergeants Major Course (SMC) resident and nonresident, and the Structured Self Development (SSD) Courses 1-5; Functional Courses: Battle Staff Noncommissioned Officer Course (BSNCOC) resident and VTT, Commandants Pre-Command Course (CPCC), and the International Military Students Pre-course (IMSPC).

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Or visit http://usasma.armylive.dodlive.mil/?page_id=471 to provide comments/recommendations.

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Chapter 1

1.1. Purpose. The purpose of the USASMA Instructor/Facilitator Certification Program is to establish guidance, policy, and procedures for instructor/facilitator certification requirements of courses for which the USASMA is the proponent. This includes monitoring and maintaining certification requirements, quality assurance oversight, and maintaining appropriate instructor/facilitator documentation.

(Ref: AR 350-1, Chap 2, Para 2-46ab, TRADOC Reg (TR) 350-70, Chap 7, para 7-1b(2))

1-2. Overview. The success of Small Group Instruction (SGI) depends on instructors/facilitators who are mentors, role models, and educators:

a. They must understand that they reflect the image and reputation of the academies and the example by which our potential and current noncommissioned officers pattern themselves. There is probably no more important task for an academy commandant than their selection of Instructors/Facilitators. Their role as mentors requires the highest level of professionalism, demonstrated competencies, and devotion to duty.

b. To ensure success, commandants must take a personal interest in the selection and assignment of Instructor/Facilitators. They must interview potential Instructor/Facilitators and select them based on their demonstrated performance, apparent leadership experience (based on commandants' evaluation), communication skills, military bearing and appearance, physical fitness, attitude, and demonstrated motivation.

1-3. The Quality Assurance (QA) Program. To provide oversight support for development and implementation of current, relevant training and professional military education to meet unit, Soldier, and leader competency needs throughout the Army:

a. Utilized to monitor the Instructor/Facilitator certification process developed and maintained within the Directorate of Training (DOT) and provide a learning environment that fosters 21st century Soldier and civilian competencies with instructional strategies.

b. Conducts periodic reviews of Instructor/Facilitator records annually and a 100 percent review of all Instructor/Facilitator records during TRADOC accreditations. The Sergeant Major Course (SMC) is required to maintain Instructor/Facilitator portfolios. The QAO uses the Instructor/Facilitator record and portfolio matrix to verify the check.

c. Ensures that Instructors/Facilitators possess the skills, knowledge, and abilities needed for the position in order to be certified in the implementation of learning products and qualified in the educational, technical, and tactical content of the course.

(Ref: AR 350-1, Chap 2, Para 2-46ab, TR 350-70, TRADOC Pam (TP) 350-70-3)

1-4. Commandant Responsibilities.

a. The certification of Instructor/Facilitators is a continuous cycle of learning, education, training, experience, performance, assessment, feedback, and reinforcement. Certification requirements apply to all components conducting Professional Military Education and Functional courses for which the USASMA is the proponent.

b. Commandants or their designated representative must ensure--

(1) They conduct an initial interview and screening selection board.

(2) Human Resources Command (HRC), HRC-STL, and NGB assist in the identification of Soldiers who meet the qualifications.

(3) NCOs meet all Instructor/Facilitator certification requirements; if not, provide the necessary support to obtain the training and education.

(4) They establish the USASMA program to ensure Instructor/Facilitators meet initial certification requirements and maintain proficiency of courseware and knowledge of current doctrine.

(5) All Soldiers have a full and equal opportunity to pursue their careers.

(6) Each instructor/facilitator has an individual instructor/facilitator folder or portfolio containing the records required for Instructor/Facilitator qualification, certification, and recertification.

(7) The composition of the screening selection board consists of, as a minimum, the Commandant, Course Director, Chief Instructor, and Senior Small Group Leader (or TDA equivalent).

(Ref: AR 600-13, TR 350-70, and TP 350-70-3)

1-5. Higher Headquarters Initial Selection Criteria for Instructor/Facilitator Duties.

a. Only the highest quality Soldiers will be assigned as Instructor/Facilitators.

b. Criteria are as follows:

(1) Be a high school graduate or possess the GED equivalent.

(2) Have no personal habits or character traits that are questionable from a security standpoint, such as financial irresponsibility, unusual foreign holdings or interest, heavy drinking, drug abuse, gambling, emotional instability, and so forth. In regards to alcohol and drug abuse, this restriction does not apply to Soldiers declared rehabilitation successes under the Army Substance Abuse Program (ASAP).

(3) Possess mature judgment and initiative.

(4) Have served at least three years of active Federal service in any branch of the Armed Forces (AC only).

(5) Have three years' time remaining in-Service upon arrival at assignment or be able to reenlist or extend to meet the requirement.

(6) USASMA fellowship program candidates must have four years' time-in-service (TIS) remaining upon assignment.

(7) Have a security clearance consistent with that required to attend the requisite instructor courses.

(8) Display good military bearing.

(9) Meet body composition requirements IAW AR 600-9.

(10) Be able to pass the Army Physical Fitness Test (APFT).

(11) Have recently held a leadership assignment or equivalent to position.

(12) Have a demonstrated ability to be an Instructor/Facilitator.

(13) Have no speech impediment.

(14) Have no record of conviction by special or general courts-martial.

(15) Must not be required to register as a sexual offender IAW AR 27-10.

c. In addition to the criteria listed above, Sergeants Major Academy Instructor/Facilitators must--

(1) Be U.S. citizens (by birth or naturalization) (except international SGA).

(2) Possess a "1" under "S" and "1" or "2" under "E" of physical profile.

(3) Have a minimum GT score of 100.

(4) Be a SMC graduate with at least one prior successful field assignment of 12 months in a Sergeant Major or Command Sergeant Major position if performing duties as an SMC Instructor/Facilitator, writer, and/or evaluator.

(5) Have a minimum of an associate's (bachelors preferred) degree for SMC/SMNRC. Commandant or designated representative has waiver authority.

(6) Be a Senior Leaders Course (SLC) graduate if SFC or MSG

(7) Be a BSNCOOC graduate and have 12 months experience on a battle staff at battalion level or higher to perform duties as a BSNCOOC Instructor/Facilitator, writer, and/or evaluator.

(8) Be graduate of the Master Leader Course (TBD).

d. The Commandant, USASMA, has final approval authority for assignments to USASMA.

(REF: AR 614-200, Chap 6, para 6-9 and 6-12; AR 27-10; Chap 24; DA Pam 611-21; TP 350-70-3, Proponent and exception authority and Chapter 3, para 3-5; MILPER MSG 15-045)

1-6. Instructor/facilitator Qualification Requirements. Personnel must meet the following basic qualification requirements:

a. All Instructors/Facilitators, to include civilians, must meet the following basic qualification requirements:

(1) Graduate of the Army Basic Instructor Course (ABIC), Foundation Instructor Facilitator Course (FIFC), or Faculty Development Program Phase 1 and 2 (FDP 1/2).

(2) Graduate of Small Group Instructor Training Course (SGITC) or Intermediate Facilitation Skills Course (IFSC).

(3) Graduate of the NCOES/Functional course they're instructing and awarded the appropriate SQI or ASI.

(4) Meet same profile limitations as students attending course and wear the same designated duty uniform as the students (military only).

(5) Meet leadership experience requirements.

(6) Meet and maintain rank requirements for their specific course of instruction.

(7) Meet and maintain current military appearance standards IAW AR 670-1 (military).

(8) Meet and maintain current weight standards IAW AR 600-9 (military). Screening must have been conducted within the past six months as a minimum.

(9) Meet and maintain current Army Physical Fitness Test (APFT) standards (military). Must have had a record APFT conducted within the past six months as a minimum.

(10) Remain free of any flagging actions IAW AR 600-8-2 (military).

b. Failure to meet and maintain standards IAW established regulatory guidance will result in removal from the program until final disposition as determined by the commandant or their designated representative.

c. Commandants may require Instructors/Facilitators to receive training in the following:

(1) Combat Life Saver.

(2) CPR certification.

(3) Required vehicle/operator qualifications.

(4) Range certification.

(5) Heat illness and cold injury prevention and treatment.

(6) Graduate of the Senior Enlisted Joint Professional Military Education (SEJPME) course (SMC/SMNRC only).

(7) Graduate of Master Resiliency Training (MRT) Course (SMC/SMNRC only).

(8) Other courses as deemed necessary to meet operational requirements.

(REF: AR 140-1, Chap 5, Para 5-4c; AR 600-8-2, DA Pam 611-21; AR 614-200; TR 350-29, App B & C)

1-7. Video Tele-training Instructor/Facilitator Requirements.

a. Instructor/Facilitators facilitating distributed learning training over VTT systems at the transmitting site must--

(1) Comply with the applicable course provisions identified in paragraph 1-5.

(2) Be a graduate of the Video Tele-training Instructor/Facilitator Training Course (VTTITC) or the Synchronous Distributed Learning Instructor Course (SdLIC).

(3) Ensure that the receiving Site Facilitator (SF) receives the VTT-SF train-up.

b. Video Teletraining (VTT) Site Facilitator receiving site requirements and duties:

(1) Be a graduate of all phases of the course in which serving as Site Facilitator.

(2) Conduct the specific practice or application required of students at remote site, ask timely and appropriate questions related to task at hand, answer most common questions, and know when to refer student questions to the lead Instructor/Facilitator.

(3) Know, understand, and enforce examination procedures, administration, and scoring of tests.

(4) Conduct preplanned contingency training or other activities (developed by lead site) when there is loss of satellite communication.

(5) Conduct an After-Action Review (AAR) at the remote site when required and provide a comprehensive EXSUM to the lead site facilitator.

(6) Manage distribution and use of materials supplied by lead training site.

(7) Manage remote site classroom.

(8) Conduct remote site student counseling.

(9) Perform remote site small group Instructor/Facilitator duties as required.

(10) Review Phase 1 requirements and training schedules.

(11) Review in-processing forms, Senior Instructor's overview, and publication requirements.

(12) Review LPs/TSPs, PEs, videos (usually two days prior to training); observe all practical exercises (PEs) and ensure student interaction during PEs.

(13) Explain the maintenance of student records and prepare input to the Service School Academic Evaluation Report (DA Form 1059).

(14) Explain graduation ceremony/procedures.

(15) Explain the senior instructor/facilitator's responsibilities versus the site coordinator/facility manager's responsibilities.

(16) Perform the duties as Test Control Officer (TCO) or Alternate Test Control Officer (ATCO) as required.

(17) Meet the same rank requirements as the SGL for that respective course.

(18) Meet height and weight standards IAW AR 600-9.

c. The Site Facilitator at the receiving site must meet the requirements in b (1) thru (18) above.

(REF: TR 350-70, Chap 7; TP 350-70-3, Chap 3; TP 350-70-6)

1-8. NCOES and Functional Course Instructor/Facilitator Qualification Requirements. In addition to requirements listed above (as applicable), Instructor/Facilitators must meet the following course specific rank and experience requirements (experience verified by an official military document):

a. **Warrior Leader Course (WLC):**

(1) SGLs must hold the rank of SSG with prior assignment experience in a skill level 3 leadership position.

(2) Complete leader heat and cold injury prevention training semiannually.

(3) SSGL must meet requirements (1) and (2) above and hold the rank of SFC with skill level 4 leadership experience (based on Commandant's evaluation).

(4) See paragraph 2-2 for alternate staffing Instructor/Facilitators' guidance.

b. **Battle Staff Noncommissioned Officer Course (BSNCOC):**

(1) SGL must hold the rank of SFC or above and have 12 months experience on a battle staff at battalion or higher as evidenced by an NCOER.

(2) Be a graduate of the BSNCOC.

(3) Possess the ASI "2S."

(4) Demonstrate thorough knowledge of staff functions.

(5) SSGL must meet requirements (1) thru (4) above and hold the rank of MSG or SGM.

(6) See paragraph 2-2 for alternate staffing Instructor/Facilitators' guidance.

c. **Commandants Pre-Command Course (CPCC):**

(1) Must meet the same certification requirements as a SMC instructor/facilitator.

(2) Current NCOA commandants or previous NCOA commandants may serve as assistant instructors (AIs) senior mentors/facilitators without certification.

(3) See paragraph 2-2 for alternate staffing Instructor/Facilitators' guidance.

d. **Sergeants Major Course (SMC) Resident/Nonresident and International Military Students PreCourse (IMSPC):**

(1) SGM/Civilian must be a SMC graduate if performing duties as an SMC Resident

or Nonresident instructor/facilitator.

(2) SGM with at least one prior successful operational assignment of 12 months in a Sergeant Major or Command Sergeant Major position as evidenced by an NCOER.

(3) Chief Instructor and Senior Instructor must meet the requirements in (1) and (2) above and have successfully served in the position of Staff Group Advisor/Associate Professor.

(4) See paragraph 2-2 for alternate staffing Instructor/Facilitators' guidance.

(REF: TR 350-70, Chap 7; TP 350-70-3, Chap 3, TR 350-29, App B and C)

1-9. The Instructor/Facilitator Certification is a Three-Part Process.

Through Instructor/Facilitator certification, the TRADOC Staff and Faculty Development Program provide the specific skills and knowledge needed by staff and faculty personnel to achieve standards of acceptable performance.

- a. The Instructor/Facilitator in addition to the requirements in paragraph 1-6 must--
 - (1) Meet all qualifications.
 - (2) Have a certified Instructor/Facilitator assigned as a mentor during certification.
 - (3) Demonstrate the ability to train course objectives to the chain of command.
 - (4) Complete a minimum of 40 hrs of academic instruction as an assistant to a certified Instructor/Facilitator (WLC, BSNCO, SMC, and SMNRC Phase 1).
 - (5) Perform duties as a primary Instructor/Facilitator for a minimum of 40 hrs of academic instruction under the supervision of a certified Instructor/Facilitator (WLC, BSNCO, SMC, and SMNRC Phase 1).
 - (6) For resident Instructor/Facilitators, receive a "Met Standard" or higher rating when evaluated using the Initial Basic Instructor/Facilitator Performance Checklist criteria at IPC-1 thru IPC-4 (used for **initial** certification only). The counseling addendum (IPC-5) is used to identify Instructor/Facilitator strengths, weaknesses, and ways to improve. Must use the assessment instrument at Appendix B, the Quarterly Instructor/Facilitator Evaluation Checklist (IFEC-1) on a quarterly basis.
 - (7) For DL Instructor/Facilitators, receive a "Met Standard" or higher rating when evaluated using the Distributed Learning Interactive Multimedia Instruction (IMI) Initial and Quarterly Facilitator Performance Checklist criteria at DLC-1 and DLC-2. The counseling addendum (DLC-2) is used to identify Instructor/Facilitator strengths, weaknesses, and ways to improve.
 - (8) After completion of FDP1 and FDP2 SMC Resident and Nonresident, Phase 2, SGA/AP may teach, but will be on an intern period for one semester facilitating

experience. During the intern period, the Chief Instructor and Senior Instructor must conduct two classroom observations (one per quarter) on the SGA/AP using the Classroom Observation Job Aid (JA) 6-1.

(9) Have an Instructor Certification Certificate (ICC) or request in process. For the SMC Resident and Nonresident, Phase 2 Instructor/Facilitator, the Chief Instructor will submit the request for an ICC at the end of the six month intern period.

(10) Have an individual Instructor/Facilitator record /file containing all required Instructor/Facilitator records documentation.

(11) A SMC Nonresident Phase 1 and 2 Instructor/Facilitator must also have certificates from Blackboard Basics Course (BbBC) and Asynchronous distributed Learning Course (AdLIC).

b. The SSGL, Chief Instructor, and Senior Instructor must meet the certification process requirements in paragraph a (1) thru (10) above and may conduct training in the absence of the SGL/SGA/AP.

(REF: TR 350-70, Chap 7; TP 350-70-3, Chap 4)

1-10. Instructor/Facilitator Recertification Process.

a. If an instructor/facilitator was certified previously and has not performed instructional duties (conducted a class) within 5 years, they must be recertified within 90 days of assuming the instructor/facilitator duty. As a minimum, recertification will include—

(1) Being a graduate of the most current instructor/facilitator course required for course instructing/facilitating.

(2) Having a certified Instructor/Facilitator assigned as a mentor during recertification.

(3) Completing a minimum of 40 hours of academic instruction as an assistant to a certified Instructor/Facilitator (WLC and BSNCOG).

(4) Instructing/facilitating one lesson of the course and receiving a “Met Standards” or higher rating evaluation by a certified Instructor/Facilitator of the same course.

(REF: TR 350-10, TR 350-70, Chap 7; TP 350-70-3, Chap 4, Para 4-2g)

1-11. Instructor/Facilitator Records. Retain complete certification records of all staff and faculty development Instructor/Facilitators trained locally.

a. Supervisors will ensure the Instructor/Facilitator record folders contain the following

(as a minimum):

- (1) Proponent Certificate or Memorandum Requesting Certification.
 - (2) Either DA Form 2-A, PQR, or ERB.
 - (3) Current DA Form 705, Army Physical Fitness Evaluation Score Card.
 - (4) DA Form 5500-R or 5501-R, Body Fat Worksheet (if applicable).
 - (5) DA Form 3349, Physical Profile (if applicable).
 - (6) Course completion certificate for course instructing.
 - (7) Army Basic Instructor Course (ABIC), Foundation Instructor Facilitator Course (FIFC) certificate, FDP 1/2, and ADLIC/ (BbBC) certificate of training if required.
 - (8) Small Group Instructor Training Course (SGITC) or Intermediate Facilitation Skills Course (IFSC) certificate.
 - (9) Additional functional training required to enhance course instruction.
 - (10) VTT-ITC certificate or the Synchronous Distributed Learning Instructor Course (SdLIC) certificate (if applicable).
 - (11) Initial Basic Instructor Performance Checklist (See App B).
 - (12) Distributed Learning (IMI) Initial and Quarterly Instructor/Facilitator Performance Checklist (See App B).
 - (13). Quarterly comprehensive written evaluations, recorded on the Quarterly Instructor/Facilitator Evaluation Checklist at QIC-1 and QIC-2 coupled with effective remedial programs as part of the instructional quality control process. (The exception to the rule is for part-time NCOA where infrequent class scheduling may only allow for semiannual evaluations, but not to exceed 180 days.).
 - (14) Proof of leader prevention of heat and cold weather injury training semiannually.
 - (15) Proof of CPR training (SMC/SMNRC only).
- b. Supervisors will ensure the faculty record/portfolio contain the following documentation within each tab (SMC Resident and Nonresident Only) (as a minimum):
- (1) Competencies. The competency listing.

(2) Certifications. Instructor/Facilitator Certification Certificate, FDP1 Certificate, Practicum #3, FDP2 Certificate for the SFDD conducted workshops and training schedule for the departmental conducted FDP2 Lesson Implementation Workshops, FDP3 Certificate (Not required to teach, but is required to author lessons), Current DA Form 705/5500/5501/3349, Academic Evaluation Report (DA 1059), and NCOER to support 12 months as a SGM or CSM in the operational Army).

(3) Self-Assessment. Philosophy of Teaching and Learning, Learning Style Inventory, Teaching Style Inventory.

(4) Resume. Enlisted Record Brief (ERB), (if not ERB), Curriculum Vitae, Army Civilian Resume, Bio, or other resume documents.

(5) Professional Development. Certificates for ABIC or FIFC, SGITC or IFSC, SATBC or FTDC, Coaching for Commitment (C4C), Advanced, Master, and Individual Development Plan (IDP) for continuing personal and professional development.

(6) Accomplishments. Articles, commendations, conference attendance, etc.

(7) Curriculum Assignments. Assignments of individual lessons by group or team leaders.

(8) Classroom Observations. Appropriate Classroom Observation Job Aid for delivery method at Appendix B. The Chief or Senior Instructor must complete a classroom observation on each SGA/AP quarterly. Any additional classroom observations completed by SFDD, QAO, or DOT will also be filed under this tab.

(9) Competency Assessments. Completed and signed assessments (filed in competency and performance-objective order).

c. Maintain files IAW Electronic ARIMS Filing System (EAFS) at <https://www.arims.army.mil/MainPage.aspx>.

NOTE: An overview of required instructor/facilitator training courses is contained in Appendix C.

(REF: TR 350-10, Chap 2, para 2-14a(5) w/IC Jun 04; TR 350-18, para 3-7 and 4-6; TR 350-70, Chap 7; TP 350-70-3, Chap 3)

Chapter 2

2-1. Initial Basic Instructor/Facilitator Performance.

a. The Initial Basic Instructor/Facilitator Performance Checklist, IPC-1 thru IPC-5, App B, provides a means of evaluating a SGL's performance in the small group environment and is a requirement for initial certification only. The SSGL completes this evaluation on all new SGLs, as a minimum, during their first iteration of a class.

b. USASMA bases all scores on a total point scale of 100 percent.

(1) For classroom instruction, evaluate performance steps 1 thru 98 using a point value of 1.02.

(2) For VTT instruction, evaluate performance steps 1 thru 105 using a point value of .95.

(3) Multiply the number of "GO's" on the appropriate checklist times the weight point value assigned above, or use of the conversion chart located at IPC-1 thru IPC-4, App B.

c. Use these evaluations as a tool to support the Noncommissioned Officer Evaluation Report (DA FORM 2166-8) rating. Rate a score of--

(1) 69 or less as "Did not Meet Standard"

(2) 70-79 as "Met Standard"

(3) 80-89 as "Exceeds Standard"

(4) 90-100 as "Far Exceeds Standard"

d. Use the Distributed Learning (IMI) Initial and Quarterly Facilitator Performance Checklist (DLE-1) to record overall assessment results for online facilitators.

e. Use Classroom Observation Job Aid 6 at App B, when completing quarterly evaluations on SMC Instructor/Facilitators.

f. Commandants/Directors will ensure the following:

(1) Those who fail to achieve minimum acceptable performance standards (less than 70 percent) for their initial iteration receive counseling, remedial training, and reevaluation.

(2) Consider those who fail to achieve minimum acceptable performance standards for their initial and reevaluation for removal from the program.

(REF: TR 350-10, TR 350-70, TR 600-21, Chap 7, and TP 350-70-3, Chap 3)

2-2. Alternate Staffing Program.

Alternate staffing personnel, government civilians and contractors who support the TASS institutional training support base.

a. Civilian and Contractor personnel must:

(1) Have a security clearance as required to attend requisite Instructor/Facilitator course.

(2) Be a graduate of the Army Basic Instructor Course (ABIC) or Foundation Instructor Facilitator Course (FIFC) or Faculty Development Phase 1/2 (FDP 1/2).

(3) Be a graduate of the Small Group Instructor Training Course (SGITC) or the Intermediate Facilitation Skills Course (IFSC).

(4) Be a graduate of the Videoteletraining Instructor Training Course (VTTITC) (if facilitating via VTT) and be a graduate of Blackboard Basics (BbBC), and the Asynchronous Distributed Learning Instructor Course (AdLIC) (if facilitating online via Blackboard).

(5) Graduate of an NCOES/functional course equivalent to, or higher, than the course they will instruct.

(6) Must possess a minimum of a Bachelor's Degree with proof of enrollment in a Masters Degree Program (in any discipline). (SMC/SMNRC/IMSPC only).

(7) Meet leadership experience requirements.

(8) Must have Honorable Military Service and was not released or discharged for unfavorable actions/reasons.

(9) Receive counseling and evaluation commensurate with other Instructor/Facilitators.

(10) Receive a "Met Standards" or higher rating when evaluated using the Initial Basic Instructor/Facilitator Performance Checklist criteria at IPC-1 thru IPC-5 (Used for initial certification only) at App B. The counseling addendum (IPC-5) is used to identify Instructor/Facilitator strengths, weaknesses, and ways to improve.

(11) Receive a "Met Standards" or higher rating when evaluated using Distributed learning (IMI) initial and quarterly facilitator performance checklist at App B (as applicable).

(12) Receive a "Met Standards" or higher rating when evaluated using the Classroom Observation Job Aid 6 (JA-6) at App B (as applicable).

b. Supervisors will ensure the alternate staffing Instructor/Facilitator records folder contain the following as a minimum--

- (1) Proponent Certificate or Memorandum Requesting Certification.
- (2) Course completion certificate with appropriate ASI or SQI for course instructing.
- (3) Army Basic Instructor Course (ABIC) or Foundation Instructor Facilitator Course (FIFC) or Faculty Development Phase 1 and 2 (FDP 1/2) certificate.
- (4) Small Group Instructor Training Course (SGITC) or Intermediate Facilitation Skills Course (IFSC).
- (5) Video Tele-training Instructor Training Course (VTT-ITC) or The Synchronous Distributed Learning Instructor Course (SdLIC) certificate (if applicable).
- (6) Blackboard (BbBC) and Asynchronous Distributed Learning Instructor Course (AdLIC) certificates (if applicable).
- (7) Initial Basic Instructor/Facilitator Performance Checklist (See App B).
- (8) Quarterly Instructor/Facilitator checklist evaluations.
- (9) Copy of resume.
- (10) Copy of civilian education degree.
- (11) Performance Work Statement (PWS).
- (12) Proof of leadership equivalency.

(REF: TR 350-10, TR 350-18, TR 350-70, Chap 7; TP 350-70-3, Chap 3)

2-3. Additional Guidance:

a. During a time when a school is short the required number of by-grade SGL for a course; commandants may use SGLs who are one grade higher than specified. Soldiers not meeting the minimum skill level/grade standards, or more than one grade higher, will not assume Instructor/Facilitator duties without prior written exception to policy approval of the USASMA Commandant or his designated representative.

b. If an Instructor/Facilitator receives a physical profile during the course that prevents him/her from participating in a particular module, the commandant must utilize other Instructor/Facilitators to assist in the conduct of the module evaluation. Instructor/Facilitators having a profile will continue to perform the duties for their small group.

c. An Instructor/Facilitator who becomes pregnant will work within the limitations of their profile. The medical profiling authority, along with the commandant, will determine the duty limitations of the pregnant Instructor/Facilitator. As appropriate, the commandant may need to review, with the medical profiling officer the duties of the Instructor/Facilitator to ensure the continued well-being of the Soldier and baby, (i.e., participation in PT, STX, classroom instruction, and performance evaluations).

d. Permanent medical profiles require updating in conjunction with the periodic physical.

e. What constitutes Leadership Experience? Examples are a successful tour of duty--

(1) In the appropriate skill level leadership position.

(2) As a sergeant (P) in a skill level 30 leadership position.

(3) As a drill sergeant.

(4) An SGL who has served in the position for 12 consecutive months.

(Ref: TR 350-10, Chap, Para 2-14)

2-4. Requests for Exception to Policy (ETP)/ Instructor/Facilitator Certification Certificate.

If required, commandants or their designated representative must submit requests for exceptions to policy to the appropriate agency listed below. All ETPs are routed through the USASMA QAO; thru DOT Director; thru Deputy CMDT to CMDT USASMA.

a. Address requests to the following responsible agency for issues germane to that agency.

(1) Director, Quality Assurance Office (QAO), 915-744-8296/DSN 621.

(a) Accreditation standards.

(b) Class size, instructor to student ratio (ISR).

(c) Constructive/Equivalent course credit.

(d) Instructor certification certificates.

(e) Instructor/facilitator grade/experience requirements.

(f) Instructor/facilitator evaluation/qualification/certification

b. Director of Training (DOT), 915-744-6098/DSN 621 or D/DOT at 915-744-8633.

- (1) Course Administrative Data (CAD).
- (2) Program of Instruction (POI).
- (3) Course Management Plan (CMP).
- (4) Individual Training Support Package (TSP)/Lesson Plan (LP).

c. Address requests directly to the appropriate course chief listed below in reference to items listed in b (1) through (4) through above:

- (1) WLC: CML 915-744-1375, DSN 621.
- (2) BSNCO: CML 915-744-9194, DSN 621.

d. Department Directors or Team Leaders at USASMA address exceptions to policy requests to the Chief of Staff and Faculty Development Division (S&FDD), CML 915-744-8531.

e. The SFDD USASMA has responsibility for issuing the Instructor/Facilitator Certification Certificates for all locally trained courses at USASMA as well as exceptions to policy.

(Ref: TP 350-70-3, Proponent and exception authority and Chapter 3, para 3-5)

Appendix A

This appendix contains the items listed in this table:

Item(s)	Page(s)
Required References	A-2
Glossary Section I: Abbreviations	A-3

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Required References

* AR 27-10	Military Justice
* AR 40-501	Standards of Medical Fitness.
* AR 350-1	Army Training and Leader Development.
* AR 600-8-2	Suspension of Favorable Personnel Actions (FLAG)
* AR 600-9	The Army Body Composition Program
* AR 600-13	Army Policy for the Assignment of Female Soldiers.
* AR 600-60	Physical Performance Evaluation System.
* AR 611-1	Military Occupational Classification Structure Development and Implementation.
*AR 614-200	Enlisted Assignments and Utilization Management.
*AR 623-3	Evaluation Reporting System.
*ADP 6-22	Army Leadership.
*ADRP 6-22	Army Leadership.
*ATP 6-22.1	The Counseling Process
*ATP 5-19/Ch1	Risk Management
*DA Pam 611-21	Military Occupational Classification and Structure.
*DA Pam 623-3	Evaluation Reporting System.
*FM 6-22	Army Leadership: Competent, Confident, and Agile
*FM 7-22	Army Physical Readiness Training
**TRADOC Reg 350-10	Institutional Leader Training and Education.
**TRADOC Reg 350-18	The Army School System (TASS).
**TRADOC Reg 350-29	Prevention of Heat and Cold Casualties.
**TRADOC Reg 350-70	Army Learning Policy and Systems
**TRADOC Reg 600-21	Noncommissioned Officer Education System Instructor Development and Recognition Program
**TRADOC Pam 350-70-3	Staff and Faculty Development.
**TRADOC Pam 350-70-6	Systems Approach to Training Analysis
**TRADOC Pam 350-70-7	Army Educational Processes
**TRADOC Pam 350-70-12	The Army Distributed Learning (DL) Guide
**TRADOC Pam 525-3-0	The U.S. Army Capstone Concept
**TRADOC Pam 525-8-2	The U.S. Army Learning Concept for 2015
**TRADOC Pam 525-8-3	The U.S. Army Training Concept 2012-2020
**TRADOC Quality Assurance (QA) Program	Revised Army Enterprise Accreditation Standards (AEAS) dated 12 Mar 2013
United States Army Sergeants Major Academy	https://www.us.army.mil/suite/page/508152
ARMIS Filing System	http://www.fcc.gov/wcb/eafs/
CALL	http://call.army.mil/
Heat Injury Prevention	https://safety.army.mil/
*DA Publications (AR, DA)	http://www.apd.army.mil/ (ARs, ADPs, ADRPs, ATPs, DA Pams, FMs, GTAs, TCs)
**TRADOC Publications	http://www.tradoc.army.mil/ (Go to Resources drop down)
Army Training Network	http://www.adtdl.army.mil/
***Joint Publications	http://www.dtic.mil/doctrine/s_index.html
SMC SOW	Contract W911SE-11-D-2008-2LO7, 2014 June 23

NOTE: * Indicates link to access Army publications.
 ** Indicates link to access TRADOC publications.
 *** Indicates link to access Joint publications.

Glossary**Section I: Abbreviations**

AA	Active Army
ABIC	Army Basic Instructor Course
AAR	After Action Review
ADLiC	Asynchronous Distributed Learning Instructor Course
APFT	Army Physical Fitness Test
ARNG	Army National Guard
ASAP	Army Substance Abuse Program
ASI	Additional Skill Identifier
ATRRS	Army Training Requirements and Resources System
BSNCOC	Battle Staff Noncommissioned Officer Course
CMP	Course Management Plan
DL	Distributed Learning
DOT	Directorate of Training and Doctrine
ELC	Experiential Learning Cycle
FDP	Faculty Development Phase
FIFC	Foundation Instructor Facilitator Course
FTDC	Foundation Training Developer Course
GED	General Educational Development
IAW	In Accordance With
IFSC	Intermediate Facilitation Skills Course
IMI	Interactive Multimedia Instruction
MLC	Master Leader Course (TBD)
NCOA	Noncommissioned Officer Academy
NCOES	Noncommissioned Officer Education System
PME	Professional Military Education
QAO	Quality Assurance Office
RC	Reserve Component (ARNG/USAR)
SATBC	Systems Approach to Training Basic Course
SF	Site Facilitator
SGA	Staff Group Advisor
SGITC	Small Group Instructor Training Course
SGL	Small Group Leader
SMC	Sergeants Major Course
SMNRC	Sergeants Major Non Resident Course
SOW	Statement of Work
SQI	Special Qualification Identifier
SSD	Structured Self Development
SSGL	Senior Small Group Leader
TASS	The Army School System
TATS	The Army Training System
TP	TRADOC Pamphlet
TR	TRADOC Regulation
USAR	United States Army Reserve
WLC	Warrior Leader Course

Section II: Terms: Not Used.

Appendix B

This appendix contains the items listed in this table:

Item(s)	Page(s)
Initial Basic Instructor/Facilitator Performance Checklist	IPC-1
Initial Basic Instructor/Facilitator Performance Step Conversion Chart	IPC-4
Counseling Addendum to Initial Basic Instructor/Facilitator Performance Checklist	IPC-5
Quarterly Instructor/Facilitator Evaluation Checklist	IFEC-1
Counseling Addendum to Quarterly Instructor/Facilitator Checklist	IFEC-2
Distributed Learning (IMI) Initial and Quarterly Facilitator Performance Checklist.	DLC-1
Counseling Addendum to Distributed Learning (IMI) Initial and Quarterly Facilitator Performance Checklist.	DLC-2
Classroom Observation Job Aid (JA) 6DL	JA 6-1DL
Classroom Observation Job Aid (JA) 6DL	JA 6-2DL
Classroom Observation Job Aid (JA) 6.	JA 6-1
Classroom Observation Job Aid (JA) 6.	JA 6-2

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Initial Basic Instructor/Facilitator Performance Checklist

NOTE: See Initial Basic Instructor/Facilitator Performance Step Conversion Chart for scoring procedures.

SGL NAME:	RANK:	Date:	TSP:	
Risk Control Measures:			GO	NO-GO
(1)-Provided <u>WARNINGS</u> for training safety hazards (Risk Management).				
(2)-Identified high risk assessment level.				
(3)-Emphasized environmental hazards.				
(4)-Stopped practice or testing when dangerous situation occurred.				
Terminal Learning Objective:			GO	NO-GO
(5)-Stated the "Action," "Conditions," and "Standards" educational outcomes.				
Technical or Tactical Competence:			GO	NO-GO
(6)-Responded to standard questions relating to objectives.				
(7)-Conducted demonstrations and exercises when appropriate.				
Introduction:			GO	NO-GO
(8)-Used motivator (Concrete Experience).				
Explained:			GO	NO-GO
(9)-Difference between training and task performance on the job.				
(10)-Performance test measurements.				
(11)-Why task is important.				
(12)-Risk assessment level.				
(13)-Environmental protection considerations.				
(14)-New terms.				
(15)- <u>WARNINGS</u> and <u>CAUTIONS</u> for training safety and job safety.				
Enabling Learning Objectives (ELO)/LEARNING STEPS/ACTIONS (LS/A):			GO	NO-GO
(16)-Explained and/or replicated cues.				
(17)-Showed steps in parts.				
(18)-Asked questions.				
(19)-Explained key points.				
(20)-Covered material in Training Support Package (TSP)/Lesson Plan (LP).				
Used:			GO	NO-GO
(21)-Logical sequencing.				
(22)-Smooth transitions.				
Job Performance Context:			GO	NO-GO
(23)-Explained relationship of task or training event to the performance soldier will carry out in the operational environment.				
Questions and Feedback:			GO	NO-GO
(24)-Engaged students every 3 to 6 minutes.				
(25)-Asked or answered questions.				
(26)-Stopped for discussion.				
(27)-Asked for feedback.				
(28)-Actively involved all students.				
Training Aids:			GO	NO-GO
(29)-Ensured training aids/equipment was operational.				
Used:			GO	NO-GO
(30)-Training aids/training equipment properly.				
(31)-Legible and appropriate visuals.				
Facilitation of Student Ability to See and Hear:			GO	NO-GO
(32)-Asked students if they could see and hear instruction.				
(33)-Corrected any identified situations where student was unable to see/hear instruction.				

Initial Basic Instructor/Facilitator Performance Checklist, con't

Initial Basic instructor/Facilitator Performance Checklist, cont		
Personal Appearance:	GO	NO-GO
(34)-Presented well-groomed appearance, confident bearing, enthusiasm, no distracting mannerisms.		
Basic Delivery Skills--Used Appropriate:	GO	NO-GO
(35)-Gestures.		
(36)-Movements.		
(37)-Communication skills.		
(38)-Enunciations.		
(39)-Speech volume.		
(40)-Tone and rate.		
(41)-Grammar and choice of words with minimum "crutch" words.		
Questioning Techniques:	GO	NO-GO
(42)-Conducted Ask-Pause-Call-Evaluate (APCE) techniques (also called pose/pause/pounce) for conference and direct questioning during practice exercises or one-on-one questions.		
Facilitate Student Performance:	GO	NO-GO
(43)-Provided frequent "checks on learning" and practice opportunities (usually over 50%) for module or lesson prior to testing.		
Conducted Practice Sessions that Included:	GO	NO-GO
(44)-One best way (correct demonstrations).		
(45)-Student activity that matched or closely modeled required job performance.		
(46)-Practice, in parts.		
(47)-Shaping of student skills.		
(48)-Specialized individual help when needed.		
(49)-Answers to student questions.		
(50)-On-the-spot correction and praise, as appropriate.		
(51)-Immediate stopping of practice when dangerous situation occurred.		
(52)-Conducted performance tests that included--		
(53)-Preparation of test conditions.		
(54)-Briefings to students.		
(55)-Presentation of performance cues.		
(56)-Observation of student performance without interruption, except for safety purposes.		
Respectful Behavior-Displayed:	GO	NO-GO
(57)-No signs of put downs, sarcasm, off-color material, or sexist/racist/ethnic remarks.		
Summaries of Instruction:	GO	NO-GO
(58)-Provided interim (when appropriate) and concluding summaries.		
Training Resource Management:	GO	NO-GO
(59)-Ensured availability of sufficient materials and resources.		
(60)-Retained control of class.		
(61)-Effectively managed disruptive students (if required).		
(62)-Used instructional time wisely.		
Training Environment-Ensured Classroom Conditions Met:	GO	NO-GO
(63)-Safety standards.		
(64)-Comfort standards.		
(65)-Hygiene standards.		
Ensured Classroom was Adequately:	GO	NO-GO
(66)-Ventilated.		
(67)-Lighted.		
(68)-Heated/cooled.		
(69)-Protected from noise distractions.		
(70)-Free of Interruptions.		
(71)-Posted with visible safety signs as required.		
(72)-Resourced with required safety equipment.		

Initial Basic Instructor/Facilitator Performance Checklist, con't

(73)-Served by the placement of observer station.		
Initial Basic Instructor/Facilitator Performance Checklist, cont	GO	NO-GO
(74)-Clean.		
(75)-Spaced for planned activities.		
<i>These additional criteria apply to Instructor/Facilitators who are conducting small group training:</i>		
Instructor/Facilitator Action-Small Group Roles-Demonstrated:	GO	NO-GO
(76)-Subject matter expert (SME) role in lessons taught.		
(77)-Facilitator role.		
(78)-Observer role.		
Experiential Learning Cycle (ELC) Facilitated Group In :	GO	NO-GO
(79)-Publishing stage.		
(80)-Processing stage.		
(81)-Generalizing stage.		
(82)-Applying stage.		
Visitors Folder:	GO	NO-GO
(83)-Maintained Visitors Folder.		
<i>These criteria apply to all Instructor/Facilitators in addition to the basic Instructor/Facilitator performance:</i>		
After Action Review (AAR) Performance Checklist:	GO	NO-GO
(84)-Conducted AAR following field/situational exercise, practical exercise, or testable module.		
(85)-Developed AAR content outline.		
(86)-Prepared appropriate room or training area.		
Introduction Stated	GO	NO-GO
(87)-AAR purpose.		
(88)-Training objective.		
(89)-Ground rules.		
(90)-Presented chronological list of training events.		
(91)-Facilitated student discussion of each event.		
Included the following:	GO	NO-GO
(92)-What student(s) observed.		
(93)-What went right (i.e., what was successful).		
(94)-What they could/should do differently.		
(95)-Asked questions involving the students and led them to clarify points.		
(96)-Listed points discussed for all to see.		
(97)-Summarized AAR highlights.		
(98)-Keeping students focused on AAR activities and purpose.		
ENTER OVERALL EVALUATION SCORE		
<i>The following additional criteria apply to Instructor/Facilitators who are conducting training via VTT in addition to the preceding basic Instructor/Facilitator performances.</i>		
Video Tele-training (VTT) Instructor/Facilitator Performance Checklist		
Instructor/Facilitator Action-Eye Contact:	GO	NO-GO
(99)-Established and maintained appropriate eye contact with main camera.		
Operation of Media Equipment:	GO	NO-GO
(100)-Exhibited operation of VTT equipment with proficiency.		
Effective Visuals--Developed or used visuals that:	GO	NO-GO
(101)-Were legible.		
(102)-Related to the objective.		
(103)-Exhibited consistent visual design.		
(104)-Displayed proper grammar and spelling.		
(105)-Conformed to TV limitations.		
Evaluator:	ENTER OVERALL EVALUATION SCORE	

(REF: TR 350-70, Chap 6, Para 6-27 and TP 350-70-3, Chap 4-3)

Initial Basic Instructor/Facilitator Performance Step Conversion Chart (Used for Initial Instructor/Facilitator Certification Only)

1. Base all scores on a total weight point of 100 percent. Each performance step for the:
 - a. Basic Instructor/Facilitator, Small Group Instructor/Facilitator, and AAR checklist requirements have a weight point value of 1.02 assigned (Performance Steps 1 thru 98).
 - b. Basic Instructor/Facilitator, Small Group Instructor/Facilitator, AAR, and VTT checklist requirements have a weight point value of .95 assigned (Performance Steps 1 thru 105).
2. Multiply the number of "GOs" on the appropriate checklist times the weight point value assigned above, or use the conversion chart below.

Performance Step	Basic Instructor + SGI	Basic + SGI + VTT	Performance Step	Basic Instructor + SGI	Basic + SGI + VTT	Performance Step	Basic Instructor + SGI	Basic + SGI + VTT	Performance Step	Basic Instructor + SGI	Basic + SGI + VTT
1	1.02	.95	28	28.56	26.60	55	56.10	52.25	82	83.64	77.90
2	2.04	1.90	29	29.58	27.55	56	57.12	53.20	83	84.66	78.85
3	3.06	2.85	30	30.60	28.50	57	58.14	54.15	84	85.68	79.80
4	4.08	3.80	31	31.62	29.45	58	59.16	55.10	85	86.70	80.75
5	5.10	4.75	32	32.64	30.40	59	60.18	56.05	86	87.72	81.70
6	6.12	5.70	33	33.66	31.35	60	61.20	57.00	87	88.74	82.65
7	7.14	6.65	34	34.68	32.30	61	62.22	57.95	88	89.76	83.60
8	8.16	7.60	35	35.70	33.25	62	63.24	58.90	89	90.78	84.55
9	9.18	8.55	36	36.72	34.20	63	64.26	59.85	90	91.80	85.50
10	10.20	9.50	37	37.74	35.15	64	65.28	60.80	91	92.82	86.45
11	11.22	10.45	38	38.76	36.10	65	66.30	61.75	92	93.84	87.40
12	12.24	11.40	39	39.78	37.05	66	67.32	62.70	93	94.86	88.35
13	13.26	12.35	40	40.80	38.00	67	68.34	63.65	94	95.88	89.30
14	14.28	13.30	41	41.82	38.95	68	69.36	64.60	95	96.90	90.25
15	15.30	14.25	42	42.84	39.90	69	70.38	65.55	96	97.92	91.20
16	16.32	15.20	43	43.86	40.85	70	71.40	66.50	97	98.94	92.15
17	17.34	16.15	44	44.88	41.80	71	72.42	67.45	98	100	93.10
18	18.36	17.10	45	45.90	42.75	72	73.44	68.40	99		94.05
19	19.38	18.05	46	46.92	43.70	73	74.46	69.35	100		95.00
20	20.40	19.00	47	47.94	44.65	74	75.48	70.30	101		95.95
21	21.42	19.95	48	48.96	45.60	75	76.50	71.25	102		96.90
22	22.42	20.90	49	49.98	46.55	76	77.52	72.20	103		97.85
23	23.46	21.85	50	51.00	47.50	77	78.54	73.15	104		98.80
24	24.48	22.80	51	52.02	48.45	78	79.56	74.10	105		100
25	25.50	23.75	52	53.04	49.40	79	80.58	75.05			
26	26.52	24.70	53	54.06	50.35	80	81.60	76.00			
27	27.54	25.65	54	55.08	51.30	81	82.62	76.95			

3. Use the following assessment rating in support of the NCOER.

a.	69 or less	Did not meet Standard -Actions do not have any effect or may have negative impacts on unit and mission.
b.	70-79	Met Standard -Actions have a positive impact on unit or mission but may be limited in scope of impact or duration
c.	80-89	Exceeds Standard -Actions have a positive impact on unit and mission.
d.	90-100	Far Exceeds Standard -Actions have a significant, enduring, and positive impact on mission, the unit, and beyond.

Counseling Addendum to Initial Basic Instructor Performance Checklist

SGL NAME: _____ RANK: _____ SSGL NAME: _____

TRAINING STRENGTHS:

TRAINING WEAKNESSES:

DEVELOPMENTAL PLAN OF ACTION:

REMARKS:

SGL signature↓	Rank↓	Date↓	

I acknowledge that I received formal counseling on my performance and understand the evaluation rating that I have received. I have discussed the recommendations for development with my SSGL and have developed the plan of action indicated above.

SSGL signature:		Date:	
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NOTE: May use the NCO Counseling and Support Form, DA Form 2166-8-1 in lieu of this form.

(REF: TR 350-70, Chap 6, Para 6-27, TP 350-70-3, Paragraphs 3-2, 4-3, and 4-6), ADRP 6-22, and ATP 6-22.1)

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Quarterly Instructor/Facilitator Evaluation Checklist

RANK: _____ NAME: _____ TSP # _____ Date: _____

A. The Instructor/Facilitator Informed Students of the TLO:	GO	NO/GO	N/A
1. Action Statement.			
2. Conditions Statement.			
3. Standards Statement.			
4. Safety Requirements.			
5. Risk assessment Level.			
6. Environmental Considerations.			
7. Evaluation Standards.			
8. Motivator.			
9. Instructional Lead-in.			
10. Enabling Learning Objectives (ELOs)*as Required.			
11. Learning Steps/Activities (LS/A) *as Required.			
B. The Instructor/Facilitator:	GO	NO/GO	NA
12. Ensured Training Aids/Equipment were Operational.			
13. Used Training Aids/Equipment Properly.			
14. Asked Questions.			
15. Provided Answers.			
16. Conducted Discussions as Appropriate.			
17. Met Training Support Package (TSP) Timelines *as Required.			
18. Provided Feedback as Required.			
19. Displayed no Disrespectful Behavior.			
20. Managed Disruptive Students.			
21. Maintained Control of Class.			
22. Conducted Review.			
23. Summarized.			
24. Conducted the Check on Learning *as Required.			
25. Provided Transition to Next TSP.			
26. Provided Testing/Assessment Requirements.			
27. Presented TSP in a Logical Sequence.			
28. Conducted an AAR *as Required.			
29. Presented Well Groomed Appearance			
30. Displayed no Distracting Mannerisms			
31. Used Effective Communication Skills.			
32. Demonstrated Subject Matter Expertise in lessons taught.			
33. Maintained a Visitors Folder.			
C. The Instructor/Facilitator Ensured the Classroom Met:	GO	NO/GO	N/A
34. Safety Standards.			
35. Comfort Standards.			
36. Hygiene Standards.			
* Score any N/A a "GO."	ENTER OVERALL RATING		
Evaluator Name:	Signature:	Date:	

NOTE: Base the overall score on a total weight point of 100 percent. In support of the NCOER rate a score of:

a.	69 or less	Did not meet Standard -Actions do not have any effect or may have negative impacts on unit and mission.
b.	70-79	Met Standard -Actions have a positive impact on unit or mission but may be limited in scope of impact or duration.
c.	80-89	Exceeds Standard -Actions have a positive impact on unit and mission.
d.	90-100	Far Exceeds Standard -Actions have a significant, enduring, and positive impact on mission, the unit, and beyond.

SGL NAME: _____ RANK: _____ SSGL NAME: _____

Counseling Addendum to Quarterly Instructor/Facilitator Checklist

TRAINING STRENGTHS:

TRAINING WEAKNESSES:

DEVELOPMENTAL PLAN OF ACTION:

REMARKS:

SGL signature↓	Rank↓	Date↓

I acknowledge that I received formal counseling on my performance and understand the evaluation rating that I have received. I have discussed the recommendations for development with my SSGL and have developed the plan of action indicated above.

SSGL signature:		Date:	
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NOTE: May use the NCO Counseling and Support Form, DA Form 2166-8-1 in lieu of this form.

(REF: TR 350-70, Chap 6, Para 6-27, TP 350-70-3, Paragraphs 3-2, 4-3, and 4-6), ADRP 6-22, and ATP 6-22.1)

Distributed Learning (IMI) Initial and Quarterly Facilitator Performance Checklist

Facilitator Standards Checklist:		GO	NGO	NA
Assisted students in the use of IMI.				
Created a mailing list of assigned learners.				
Maintained a mailing list of assigned learners.				
Communicated to the learner why they needed to master the task or skill.				
Responded to operational questions.				
Monitored performance using LMS.				
Tracked performance through designated LMS.				
Communicated effectively and efficiently in order to reduce learner frustration.				
Scheduled students for remedial training.				
Provided remedial instruction.				
Provided required counseling.				
Conducted diagnostic assessment.				
Identified performance deficiencies.				
Prescribed the next level of instruction.				
Stimulated active participation.				
Mentored the assigned learner.				
Kept learner aware of current status in course.				
Conducted review of tests and student responses.				
Informed student as to why a response was incorrect.				
Maintained current student progress report.				
Ensured notification to students as a result of their activity or inactivity in course.				
Provided prompt student feedback.				
Indicated improvement since the learner's last evaluation.				
Maintained collection of data that included learner log-on/log-off times.				
Actively tracked learners progress throughout the course.				
Ensured receipt of certificate/diploma upon course completion in ATRRS.				
Facilitator Name:	Overall Score:			
Signature:	Date:			
Evaluator Name:				
Signature:	Date:			

1. **NOT** to be used in conjunction with IPC-4 Conversion Chart.
2. Base the overall score on a total weight point of 100 percent. In support of the NCOER rate a score of:

a.	69 or less	Did not meet Standard- Actions do not have any effect or may have negative impacts on unit and mission.
b.	70-79	Met Standard- Actions have a positive impact on unit or mission but may be limited in scope of impact or duration
c.	80-89	Exceeds Standard- Actions have a positive impact on unit and mission.
d.	90-100	Far Exceeds Standard- Actions have a significant, enduring, and positive impact on mission, the unit, and beyond.

Counseling Addendum to Distributed Learning (IMI) Initial and Quarterly Facilitator Performance Checklist

Facilitator Name: _____ RANK: _____ SSGL NAME: _____

TRAINING STRENGTHS:

TRAINING WEAKNESSES:

DEVELOPMENTAL PLAN OF ACTION:

REMARKS:

SGL signature↓	Rank↓	Date↓

I acknowledge that I received formal counseling on my performance and understand the evaluation rating that I have received. I have discussed the recommendations for development with my SSGL and have developed the plan of action indicated above.

SSGL signature:		Date:	
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NOTE: May use the NCO Counseling and Support Form, DA Form 2166-8-1 in lieu of this form.

(REF: TR 350-70, Chap 6, Para 6-27, TP 350-70-3, Paragraphs 3-2, 4-3, and 4-6, ADRP 6-22, and ATP 6-22.1)

Classroom Observation Job Aid (dL)

Course/Lesson/Topic: _____ Evaluator: _____

Date: _____ Instructor/Facilitator: _____

	GO	NO/GO	Remarks
1. Visitor's Folder will contain the following as a minimum (<i>TRADOC Reg 350-18, para 4-5</i>):			
a. Visitor sign-in log			
b. Course Class Roster ATRRS R2 report. (Minus SSN)			
c. Student attendance register (<i>TRADOC Form 270-R, Sign-in/out Roster, IDT Only, para 3-14</i> (minus SSN)			
d. Course POI/CMP			
e. Instructor credentials.			
2. Are copies of approved waivers for the class in session in the classroom? (<i>Course CMP</i>)			
3. Is the Instructor/Facilitator following the approved lesson plan? (<i>Course CMP</i>)			
4. Does the training schedule follow the required CMP Course Map sequence? (<i>CMP Course Map</i>)			
5. Are the classroom conditions adequate to promote learning? (<i>TR 350-10, para 2-7d</i>)			
6. Are safety requirements being explained and followed? (<i>TR 350-70, Fig 5-3, Table 9</i>)			
7. Is the Instructor/Facilitator to student ratio being followed? (<i>Course POI</i>)			
8. Is the student to equipment ratio being followed? (<i>Course POI</i>)			
9. Are feedback/observation forms available for classroom visitors?			
ENTER OVERALL ASSESSMENT RATING:			

NOTE: Base the overall score on a total weight point of 100 percent. In support of the NCOER rate a score of:

a.	69 or less	Did not meet Standard -Actions do not have any effect or may have negative impacts on unit and mission.
b.	70-79	Met Standard -Actions have a positive impact on unit or mission but may be limited in scope of impact or duration
c.	80-89	Exceeds Standard -Actions have a positive impact on unit and mission.
d.	90-100	Far Exceeds Standard -Actions have a significant, enduring, and positive impact on mission, the unit, and beyond.

Classroom Observation Job Aid (DL)

Staff Group Advisor (SGA)/Instructor/Facilitator: _____ Date: _____ Classroom/Location: _____

Course/Department/Team: _____ Lesson/Topic/Module: _____

Time: _____ Instructor to Student Ratio: _____

<p>Instructional Methodology:</p> <ul style="list-style-type: none"> - Orientation to the learning objective. - Methodology (ELC, ELM, ALMS). - Facilitation of learning, factual, conceptual, procedural, meta-cognitive knowledge. - Assessment of learning (formative, summative). - Delivery (asynchronous). 	<p>Observations:</p>
<p>Curriculum Content:</p> <ul style="list-style-type: none"> - Current, accurate, and relevant. - Appropriate breadth and depth. - Development of critical reasoning and creative thinking. (Intellectual standards, elements of reasoning. - Quality of media. - CALL/COE and ALM 2015 incorporated. 	<p>Observations:</p>
<p>Classroom/Learning Environment:</p> <ul style="list-style-type: none"> - Blended instruction method. - IMI products. - Threaded Discussions. 	<p>Observations:</p>
<p>Technology and Information:</p> <ul style="list-style-type: none"> - Use of automation tools. - Coupling of technology with learning. - Student management of information. - Simulations. 	<p>Observations:</p>

Faculty-centered ← **Approach to teaching and learning** → Student-centered

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Observed by: _____ Organization: _____

Classroom Observation Job Aid (resident)

Course/Lesson/Topic: _____ Evaluator: _____
 Date: _____ Instructor/Facilitator: _____

	GO	NO/GO	Remarks
1. Visitor's Folder will contain the following (<i>TRADOC Reg 350-18, para 4-5</i>):			
a. Visitor sign-in log.			
b. Course class roster ATRRS R2 report (minus SSN).			
c. Student attendance register (<i>TRADOC Form 270-R, Sign-in/out Roster, IDT Only, para 3-14</i> (minus SSN).			
d. Training Schedule.			
e. POI/CMP and Current Lesson Plan.			
f. Instructor Credentials to include:			
g. Copy of instructor's proponent certification or copy of the memo to the proponent requesting certification			
h. Feedback/observation sheet for class visitors			
i. Copy of Daily Risk Assessment Worksheet			
2. Are copies of approved waivers for the class in session in the classroom? (<i>Course CMP</i>)			
3. Is the instructor following the approved lesson plan? (<i>CMP</i>)			
4. Does the training schedule follow the required CMP Course Map sequence? (<i>CMP</i>)			
5. Is the classroom adequate to promote learning? (<i>TR 350-10, para 2-7d</i>)			
6. Are safety requirements being explained and followed? (<i>TR 350-70, Fig 5-3, Table 9</i>)			
7. Is instructor to student ratio followed? (<i>Current POI</i>)			
8. Is student to equipment ratio being followed? (<i>Current POI</i>)			
ENTER OVERALL ASSESSMENT RATING:			

NOTE: Base the overall score on a total weight point of 100 percent. In support of the NCOER rate a score of:

a.	69 or less	Did not meet Standard -Actions do not have any effect or may have negative impacts on unit and mission.
b.	70-79	Met Standard -Actions have a positive impact on unit or mission but may be limited in scope of impact or duration
c.	80-89	Exceeds Standard -Actions have a positive impact on unit and mission.
d.	90-100	Far Exceeds Standard -Actions have a significant, enduring, and positive impact on mission, the unit, and beyond.

Classroom Observation Job Aid (resident)

Staff Group Advisor (SGA)/Instructor/Facilitator: _____ Date: _____ Classroom/Location: _____
 Course/Department/Team: _____ Lesson/Topic/Module: _____
 Time: _____ Instructor to Student Ratio: _____

Instructional Methodology: - Orientation to the learning objective. - Methodology (Experiential, Socratic, Lecture, etc.) If SMC, check that SGA incorporates the Concrete Experience (CE), Publish & Process (P&P), Generalize New Information (GNI), Develop (future use), and Apply steps of the Experiential Learning Model (ELM). - Facilitation of learning. - Assessment of learning (formative, summative). - Delivery (voice, tone, movement).	Observations:
Curriculum Content: - Current, accurate, and relevant. - Appropriate breadth and depth. - Development of critical reasoning and creative thinking. - Quality of media. - CALL/COE incorporated.	Observations:
Classroom/Learning Environment: - Classroom configuration. - Physical environment. - Classroom management.	Observations:
Technology and Information: - Use of automation tools. - Coupling of technology with learning. - Student management of information. - Simulations.	Observations:

Faculty-centered ← **Approach to teaching and learning** → Student-centered

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Observed by: _____ Organization: _____

Appendix C

This appendix contains the Staff and Faculty Instructor/Facilitator Certification Courses description overview.

Foundation Instructor Facilitator Course (FIFC)	<i>Redesign of ABIC</i>
<p>FIFC is a 10-day, 80-hour blended learning course comprised of two phases that trains instructors to deliver basic instructional and facilitation techniques and methods. Phase I is delivered via prerequisite web-based, asynchronous, self-paced interactive multimedia instruction (IMI) and prepares students for the Phase II resident lessons.. Phase II is an 8-day comprehensive training program that prepares students for instructor/facilitator certification. During Phase II, students “learn by doing” and give three progressively longer presentations using conference, combined conference demonstration/practical exercise, and facilitation methods of instruction while functioning as the instructor/facilitator.</p>	
Foundation Training Developer Course (FTDC)	<i>Redesign of SATBC</i>
<p>FTDC is a 6-day, 48-hour blended learning course comprised of two phases that familiarize individuals assigned to positions as training developers, as well as supervisors of training developers, with the Analysis, Design, Development, Implementation, and Evaluation (ADDIE) process used to develop Army learning products. Phase I is delivered via prerequisite web-based, asynchronous, self-paced IMI and prepares students for Phase II. Phase II resident training focuses on student application of the concepts presented in Phase I. The Phase II lessons are delivered using learner-centric, facilitated instructional methods that provide students the opportunity to work in small groups to apply their previous experiences and knowledge to research handouts, regulations, and other documents in order to create knowledge collaboratively.</p>	
Intermediate Facilitation Skills Course (IFSC)	<i>Redesign of SGITC</i>
<p>IFSC is a 5-day, 40-hour blended learning course comprised of two phases that supports the concepts and principles of the Army Learning Model in an integrated blended learning approach. Phase I is delivered via prerequisite web-based, asynchronous, self-paced IMI and prepares students to apply the concepts and fundamentals learned in Phase I to various methods used for facilitation during the resident Phase II. In IFSC, students learn by completing practical exercises, facilitating lessons, collaborating in groups, and observing peer facilitators. Although the primary instructor/facilitator models proper facilitation behavior throughout the course, the majority of the instruction is provided by the students as they learn and experiment with new behaviors while facilitating small group methods and lessons. The</p>	
Blackboard Basics Course (BbBC)	<i>Redesign of BbBC</i>
<p>BbBC is a 2-day, 14-hour course that is comprised of seven lessons. Each lesson consists of a pre- and posttest, checks-on-learning, and hands-on practical exercises that reinforce key concepts and use of the components of Blackboard (Bb). The BbBC is a DL course that instructs the fundamentals of using Bb as a student and as an instructor/facilitator.</p>	
Advanced Training Developer Course (ATDC)	<i>New Course</i>
<p>ATDC is a 6-day, 45-hour blended learning course comprised of two phases that trains experienced training developers how to design, develop, and evaluate training products for learner-centric, blended learning environments. Phase I is delivered via prerequisite web-based, asynchronous, self-paced DL IMI and prepares students for the Phase II. Phase II is instructor facilitated resident training which focuses on student application of the concepts presented in Phase I. Topics facilitated during the resident 32-hour Phase II include the Army Learning Model 2015 Learning Environment, Socratic Questioning and Case-Based Instruction, Problem-Based Instruction, Electronic and Mobile Learning, Emerging Technologies, Developing Rubric-based Assessments, and Lesson Plan Design and Development.</p>	
Advanced Facilitation Skills Course (AFSC)	<i>New Course</i>
<p>AFSC is a 6-day, 45-hour blended learning course comprised of two phases that trains advanced facilitation skills to experienced instructors/facilitators. Phase I is delivered via prerequisite web-based, asynchronous, self-paced IMI and prepares students for the Phase II instructor facilitated resident training which focuses on student application of the concepts presented in Phase I. During the 32-hour resident Phase II, students expand upon topics learned in Phase I and demonstrate the ability to facilitate lessons using inquiry-based, case-based, and problem-based instruction; facilitate using Electronic and Mobile Learning and Emerging Technologies.</p>	

Asynchronous Distributed Learning Instructor Course (AdLIC)	Redesign of AdLIC
ADLIC is a 45-hour DL course taught asynchronously with an instructor in the loop via Blackboard (online) over a 4-week period engaging students for approximately 10 hours per week. ADLIC is designed to teach the fundamentals of asynchronous instruction and provide experienced instructor/facilitators with the skills and competencies necessary to facilitate asynchronous instruction. ADLIC introduces effective online facilitation methodologies, theories, and instructional strategies for effective facilitation, appropriate use of asynchronous online teaching technologies, and introduces scenario-based exercises that require students to apply the basic principles of asynchronous online facilitation.	
Synchronous Distributed Learning Instructor Course (SdLIC)	Redesign of SdLIC
SDLIC is a 6-day, 45-hour blended-learning course comprised of two phases that trains experienced instructor/facilitators how to effectively present and facilitate training/education using the Army's web conferencing tools: Video Tele-training (VTT) and the Defense Connect Online (DCO). During Phase I, students complete 5 hours of IMI that covers fundamental knowledge and skills related to the process of teaching/facilitating synchronously. During Phase II, students attend a resident phase that consists of 24 hours of performance-based, instructor-led instruction and practical exercises and 16 hours of hands-on experience using VTT and DCO.	
Test Construction Course (TCC)	New (TBD)
TCC is a 4-day, 32-hour course designed to teach instructor/facilitator and training developers the skills and knowledge necessary to successfully develop evaluation/measurement tools to assess learning outcomes. Students gain an understanding of performance measurement, test development, critical/creative thinking, classifications of test and Taxonomies of Learning. They develop objectives and learn how to evaluate student performance. The TCC also covers test control and security, validating test items and effectiveness, measuring test validity and reliability.	
Training and Education Developer Middle Manager Course (TEDMMC)	No change
TEDMMC is a 5-day, 40-hour course designed to enhance the skills of training and education developers to manage the development and delivery of training and education products and learning methodologies. The TEDMMC is offered as a resident or non-resident course supported by video tele-training (VTT) and employs Train-the-Trainer cost efficiencies. The course is intended to be a follow-on to the Systems Approach to Training (SATs) Basic Course (SATBC) or the Foundation Training Developer Course (FTDC).	
Faculty Development Phase (FDP) 1	No change
FDP-1 is a 40-hour entry level course for newly assigned staff group advisors. In this, the new faculty member is introduced to the foundations of the SMC educational philosophy. It uses Small Group Instruction (SGI) to model teaching methods that provide classroom experiences based on adult learning principles, the Experiential Learning Model (ELM), Learning Style Theory, and adult learning environments. After completion of the 40-hr course, the student must then conduct Practicum #3 (a 50-min presentation) which will be assessed by the staff group advisor's department head or team leader. After successful completion of Practicum #3, the student will receive a certificate of completion for FDP1.	
Faculty Development Phase (FDP) 2	No change
FDP-2 is a 40-hour entry level course for newly assigned staff group advisors and consists of two phases. SFDD will present two days of workshops which include an Introduction to SMC Curriculum, Collaborative Learning Groups, Critical Thinking, and Assessment of Learning. This portion of FDP2 will immediately follow FDP1. The second part of FDP2 will be Lesson Implementation Workshops (LIWs) conducted within the departments. In this portion of FDP2, faculty members learn and practice methodologies for presenting curriculum content and learn about updates in the curriculum.	
Faculty Development Phase (FDP) 3	No change
FDP3 is a 40-hr course designed for individuals authoring/revising SMC courseware. Prior to authoring/revising SMC courseware, faculty must complete Phase. For course author qualification, the lesson/course author must attend and write a selected course or lesson using the steps identified for the five phases of the Accountable Instructional System (AIS): Analysis, Design, Development, Implementation, and Evaluation. In FDP3, lesson and course authors learn how to use the Accountable Instructional System (AIS) — the USASMA guideline for course and lesson development to write/revise SMC courseware. The AIS meets the TRADOC requirement for completion of a Systems Approach to Training (SAT) process.	

Faculty Development Phase (FDP) 4	<i>No change</i>
FDP4: Faculty and staff attend continuing education courses; both USASMA-sponsored and public-sponsored education and training classes to assist them in maintaining currency in professional military and educational topics and in acquiring knowledge of emerging educational technologies. FDP4 is ongoing and allows faculty to build their IDP and augment, maintain, or improve their civilian and military education, and professional activities in their (CV). Although FDP4 is managed by SFDD, all schools and departments partner in the planning and implementation of these ongoing opportunities for professional development.	

NOTE: 1. FDP1 and FDP2 are required prior to facilitating the Sergeants Major Course.

2. This link provides scheduling dates, course description, and POC:

<http://www.atsc.army.mil/ESD/Sfworking/ftdc.asp>.

3. ATSC Staff and Faculty Development Office:

<https://atn.army.mil/TreeViewCStab.aspx?loadTierID=3961&docID=35>

(REF: TP 350-70-3, Chap 4 & 5; TP 350-70-7, Chap 4, Figure 4-1)

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Appendix D

This appendix contains the items listed in this table:

Item(s)	Page(s)
Instructor Certification Certificate Request	D-2
Request Completion Instructions	D-3

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(Office Symbol)

Date

SUBJECT: Request for Instructor Certification Certificate Example.

1. The following individual(s) meet(s) the requirements listed in the USASMA Instructor Certification Program (ICP) dated 1 March 2015 and the Staff and Faculty Development Division, Annex A, of the USASMA SOP.

Rank: _____ **Full Name:** _____
SGL: _____ **SSGL:** _____
Course: WLC _____ BSNCOC _____
Leadership Experience: Position: _____ **Date(s):** _____
Graduation Date of NCOES/Functional course: _____
Date Completed: APFT: _____ ABIC: _____ SGITC: _____
ADLIC: _____ **BbBC:** _____ **FIFC:** _____ **IFSC** _____
BbBC: _____ **SdLIC:** _____ **AFSC:** _____
Initial Basic Instructor Performance Checklist: _____
Mentorship Completion Dates: _____ **Assistant Instructor:** _____
ATRRS CRS# _____
Primary Instructor: _____ **ATRRS CRS #:** _____
Mentored By: _____
Flagged/actions pending? Yes _____ No _____
Meets height/weight standards IAW AR 600-9: Yes _____ No _____

2. Point of contact is the undersigned at COMML: XXX-XXXX, DSN: XXX-XXXX or email address.

FIRST M. LAST
 RANK, USA
 Commandant

NOTE: IAW Paragraph 2-4, all ETPs are routed through the USASMA QAO; thru DOT Director; thru Deputy CMDT to CMDT, BLDG 11291, USASMA, Ft. Bliss, TX 79918-8002

Date(s): Enter as mm/dd/yyyy

Rank: Self explanatory

Full Name: Self explanatory.

Leadership Experience: (**IAW USASMA ICP pg 4**) List the position title or titles and number of months, then from and to dates to support the number of months. If the Soldier does not meet this requirement, then an exception to policy must be submitted. In which case, the date of the **approved** exception to policy is listed here.

Graduation Date of NCOES/FUNCTIONAL Course: Date the Soldier completed the NCOES/Functional course for which they will be assigned to instruct/facilitate.

APFT Date: Self explanatory (must be within six months).

ABIC: Date completed.

SGITC: Date completed.

ADLIC: Date completed

FIFC: Date completed

IFSC: Date completed

BbBC: Date completed

SdLIC: Date completed

AFSC: Date completed

Initial Basic Instructor Performance Checklist: Date completed.

Mentorship Completion: Self explanatory.

Memorandum must be signed by the commandant or their designated representative.

NOTE: Request memorandum may include more than one individual with all required information for each.

Review Process: The following individuals have reviewed and concur with this Instructor/Facilitator Certification Program (ICP) as it applies to instructors/facilitators in the Noncommissioned Officer Education System (NCOES) and functional courses for which USASMA is the proponent.

Name/Signature	Rank	Title	Date
 Benjamin M. Stevens	GS-11	Senior Analyst	06/10/15
 Oscar Rivera	SGM	Integration & Analysis, (TD&E)	06/10/15
 Charles E. Guyette	GS-14	Director/DOT	06/10/15

Approval Authority: The Commandant, USASMA, has reviewed and approved this Instructor Certification Program (ICP) for instructor/facilitators in the Noncommissioned Officer Education System (NCOES) and functional courses for which USASMA is the proponent.



DENNIS E. DEFREESE
CSM, USA
Commandant