PERFORMANCE TRAINING AND EDUCATION MANUAL (PTEM)

COMDTINST 1500.10D
April 2023

THIS PAGE INTENTIONALLY LEFT BLANK

Commandant
United States Coast Guard
Force Readiness Command

300 East Main Street
Norfolk, VA 23150-9101
Staff Symbol: FC-C
Phone: (757) 628-4149
Email: SMB-FORCECOM-FC-T-
PolicyandPlanning@uscg.mil

COMDTINST 1500.10D
19 APRIL 2023

COMMANDANT INSTRUCTION 1500.10D

Subj: PERFORMANCE, TRAINING AND EDUCATION MANUAL (PTEM)

Ref: (a) 14 U.S. Code Section 263
      (b) Marine Industry Training Program ,14 U.S.C. § 315
      (c) Arrange for training with DoD Services' Schools, 14 U.S.C. § 501
      (d) Provide specialized training to personnel. 14 U.S.C. § 504(a)(7)
      (e) Army and AF training for CG members, 14 U.S.C. § 704
      (f) Navy training for CG members, 14 U.S.C. § 705
      (g) Training at non-government facilities, 14 U.S.C. § 2013
      (h) Special instruction at universities, 14 U.S.C. § 2770
      (i) Training for reserve members, 14 U.S.C. § 3701
      (j) Authorized levels of military training student loads, 14 U.S.C. § 4903-4904
      (k) Of the Higher Education Opportunity Act 20 U.S.C. § 1015d
      (l) Acceptance of fellowships, scholarships, or grants, 10 U.S.C. § 2603
      (m) Coast Guard Voluntary Credentialing Program (VCP), COMDTINST 1540.10
          (series)
      (n) Military to Mariner Voluntary Credentialing Program, COMDTINST 1540.2 (series)
      (o) Military Assignments and Authorized Absences, COMDTINST M1000.8 (series)
      (p) Government Travel Charge Card (GTCC) Program Policies and Procedures,
          COMDTINST M4600.18 (series)
      (q) Auxiliary Manual, COMDTINST M16790.1 (series)
      (r) Cutter Training and Qualification Manual, COMDTINST M3502.4 (series)
      (s) U.S. Coast Guard Competency Management System Manual, COMDTINST 5300.2
          (series)
      (t) Mandatory Use of the Training Management Tool, COMDTINST 5270.2 (series)
      (u) Officers Accessions, Evaluations, and Promotions, COMDTINST M1000.3 (series)
      (v) Coast Guard Recruiting Manual, COMDTINST M1100.2 (series)
      (w) Enlistments, Evaluations, and Advancements, COMDTINST M1000.2 (series)
      (x) Reserve Policy Manual, COMDTINST M1001.28 (series)
      (y) Body Compositions Standards Program, COMDTINST M1020.8 (series)
      (z) Coast Guard Medical Manual, COMDTINST 6000.1 (series)
      (aa) Coast Guard Personnel Allowance List (PAL) Manual, COMDTINST M5312.14
          (series)
      (bb) Marine Industry Training Program, COMDTINST 1500.4 (series)
      (cc) Mission Support Industry Training Program, COMDTINST 1500.3 (series)

1

(dd) Coast Guard Aviation Medicine Manual, COMDTINST 6410.3 (series)
(ee) Recoupment of Advanced Education costs in the Event of Separation Before Completion of Obligated Service, COMDTINST 1560.3 (series)
(ff) Government Travel Charge Card (GTCC) Policies, COMDTINST 4600.14 (series)
(gg) Personnel Accountability System (PAS) Policy, COMDTINST 3006.4 (series)
(hh) Post 9/11 and Montgomery GI Bill Educational Assistance Programs, COMDTINST M1780.3 (series)

1. PURPOSE. This Instruction establishes policy for training, education, and workforce development and provides an overview of the Coast Guard Training System.

2. ACTION. All Coast Guard unit commanders, commanding officers, officers-in-charge, deputy/assistant commandants, chief of headquarter directorates must comply with the policies contained.

3. AUTHORIZED RELEASE. Internet release is authorized.

4. DIRECTIVES AFFECTED. The Performance, Training and Education Manual, COMDTINST M1500.10C is hereby cancelled.

5. DISCUSSON. In accordance with new directives policy the PTEM is revised as an Instruction vice a Manual.

6. DISCLAIMER. This guidance is not a substitute for applicable legal requirements, nor is it itself a rule. It is intended to provide administrative guidance for Coast Guard personnel and is not intended nor does it impose legally binding requirements on any party outside the Coast Guard.

7. MAJOR CHANGES. This is a total revision to the instruction, reorganizing content, defining Formal Training, removing procedural information, and removing discussion on the old financial system. The Foreign Language Proficiency Pay chapter was removed as it is not training, nor education related. While Formal Training is newly defined, all the training covered by that definition remains the same. Gaps in the Advanced Education chapter were addressed, such as the Olmsted Scholar Program (OSP), to include additional obligated service for the AD who participates in OSP, along with policy regarding member acceptance of scholarships. Responsibilities from FC-T were divided between the FC-B and FC-CI divisions. Finally, there are updates to the Class "A" School Disenrollment policy, including policy specific to victims of Sexual Assault, and a reduction of administrative burden for Non-Judicial Punishment (NJP).

8. SCOPE AND AUTHORITIES. It is recommended the reader become familiar with the directives and publications noted as References (a) through (hh) of this Instruction.

9. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS. The Office of Environmental Management, Commandant (CG-47) reviewed this Commandant Instruction and the general policies contained within and determined that this policy falls under the Department of Homeland Security (DHS) categorical exclusion A3. This Commandant

Instruction will not result in any substantial change to existing environmental conditions or violation of any applicable federal, state, or local laws relating to the protection of the environment. It is the responsibility of the action proponent to evaluate all future specific actions resulting from this policy for compliance with the National Environmental Policy Act (NEPA), other applicable environmental requirements, and the U.S. Coast Guard Environmental Planning Policy, COMDTINST 5090.1 (series).

10. DISTRIBUTION. No paper distribution will be made of this Instruction. An electronic version will be in the Coast Guard Directives System Library internally, and if applicable on the Internet at www.dcms.uscg.mil/directives .

11. RECORDS MANAGEMENT CONSIDERATIONS. Records created as a result of this Instruction, regardless of format or media, must be managed in accordance with the records retention schedule located on the Records Resource Center SharePoint site at: https://uscg.sharepoint-mil.us/sites/cg61/SitePages/CG-611-RIM.aspx .

12. FORMS/REPORTS. The forms referenced in this Instruction are available on the Coast Guard Standard Workstation or on the Internet: www.dcms.uscg.mil/Our-Organization/Assistant-Commandant-for-C4IT-CG-6/The-Office-of-Information-Management-CG- 61/Forms-Management/ .

13. SECTION 508. This Instruction was created to adhere to Accessibility guidelines and standards as promulgated by the U.S. Access Board. If changes are needed, please communicate with the Coast Guard Section 508 Program Management Office at Section.508@uscg.mil .

14. REQUEST FOR CHANGES. Units and individuals may formally recommend changes through the chain of command using the Coast Guard Memorandum. All such correspondence may be emailed to FORCECOM at: (HQS-DG-LST-CG-FORCECOM-SP).

/M.W. RAYMOND/
Rear Admiral, U. S. Coast Guard
Commander, Coast Guard
Force Readiness Command

Appendix A. Acronyms
Appendix B. Glossary

TABLE OF CONTENTS

PERFORMANCE, TRAINING, AND EDUCATION MANUAL

CHAPTER 1 INTRODUCTION

A. Mission

The mission of the Training System is to support job accomplishments of the entire workforce through the application of human performance technology principles, including the design and delivery of training of all types that leverage emerging technologies to improve the skills and knowledge that support performance in the fleet.

B. Coast Guard Philosophy on Training, Education, and Professional Development

Each member of the organization shares the responsibility for ensuring that the workforce is fully capable of performing the functions of their assigned roles and the tasks for each Coast Guard Mission. Creating a performance system that provides individuals with the tools they need to succeed will accomplish continuous improvement of job performance. The FORCECOM focus is on the skills, knowledge, and information that directly supports performance and the education that enhances our people's overall well-being and effectiveness. In all its forms, training focuses on skill and knowledge that are job-specific and performance-driven. Education concentrates on skills and knowledge that are more subject-matter driven and less focused on supporting a specific job. Lastly, professional development focuses on the continual growth of the individual through experiences.

C. Responsibilities

The Coast Guard clearly identifies its most valuable resource as the men and women who carry out the Service's missions. Thus, workforce development opportunities are essential for the Service's ability to fulfill or support mission requirements with confidence, safety, and flexibility. The Coast Guard relies on strong relationships at Headquarters (HQ), unit, and individual levels to sustain readiness throughout the organization. Relationships at each level depend on one another, and the following paragraphs provide a general description of Headquarters, unit, and individual-level responsibilities.

1. FORCECOM, Training Division (FC-T) must:

    a. Promulgate and adjudicate training policy, technical standards, processes, guidelines, and best practices;

    b. Implement Human Performance Technology (HPT) to assess performance issues by identifying root causes of job performance problems and by tailoring appropriate solution sets;

    c. Identify Performance Analysts and Training Managers for all Formal Training Courses;

    d. Conduct analyses and communicate acquired findings to HQ Program Managers (PMs) to foster a sense of clarity regarding next steps for training and performance

supports required to mitigate gaps;

e. Measure effectiveness of Formal Training policies, procedures, and resource utilization to maximize the effectiveness of training and education;

f. Encourage and promote collaboration among field commanders and program, force, facility, and acquisition managers, and the Training System through effective leadership;

g. Ensure all Formal Training opportunities and solutions are responsive to service needs and are conducted in the most effective and efficient manner;

h. Communicate Training Enterprise requirements for the Learning Management System (LMS) to FC-B;

i. Maintain liaison with Department of Homeland Security (DHS) via the DHS Training Leaders' Council;

j. Function as the Inter-Service Training Office (ITO) in coordination with other military ITOs;

k. Manage the Enlisted Rating Advancement Training System;

l. Manage Formal Training for the Coast Guard to include throughput requirements, curriculum outlines, and other curriculum control documents. Act as waiver authority for all Formal Training course requirements. FC-T may delegate waiver authority to the PM or Course Manager (CM);

m. Manage the Formal Training Quota Build process to develop the total annual training throughput requirements for the Coast Guard's Formal Training;

n. Manage the Formal Training Prioritization process to maximize training for Coast Guard members during times of limited resources;

o. Grant final approval for guest instructors or adjunct instructors for Formal Training Courses when the need is justified. Instructors must deliver content via non-resident modality, i.e., video or virtual, unless the course material can only be met through in-person delivery;

p. Serve as training technical authority for all aspects of Formal Training; to include the Training Centers (TRACEN) Commercially Contracted Class "C" Schools, Other Government Agency (OGA) training, functions at the Education and Training Quota Management Command (ETQC); and the Use of Training Allowance Billets (TAB);

q. Serve as technical authority over PSC and CGRC for Class "A" Schools and Accession training; and

r. Manage Coast Guard Mandated Training (MT).

2. FORCECOM- Business Operations Division (FC-B) must:

   a. Serve as Commandant's program sponsor and sponsor representative for the LMS;

   b. Serve as program office for FORCECOM enterprise-wide training and education resources;

   c. Manage formal training and education funding made available to FORCECOM and the broader Training and Education Enterprise;

   d. Manage training quota control systems and staffing to support Formal Training, Education, and Accessions programs;

   e. Manage budget (operating funds) and staffing for the FORCECOM Training System (TRASYS);

   f. Provide tactical oversight of ETQC, CGPC (epm) and CGRC ensuring compliance with FC-T training policies, processes, and procedures;

   g. Provide tactical oversight of ETQC, ensuring compliance with FC-CI education tactics, policies, processes, and procedures;

   h. Serve as requirements validator for new information technology (IT) capability gaps or IT acquisitions in accordance with FCEA; and

   i. Maintain authority over the Systems Engineering Life Cycle (SELC) and Acquisition Lifecycle Framework for all proposed and existing FORCECOM information technology systems, to include simulators, training aids, etc.

3. FORCECOM Career Management Division (FC-CI) must:

   a. Establish and maintain policy for Voluntary Education (VolEd) and Voluntary Credentialing programs (VCP) outlined in Reference (m) to include Military to Mariner (M2M) outlined in Reference (n), The Advanced Education (AE) Program, and The Civilian Career Management Program;

   b. Serve as Chief of the AE Program;

   c. Provide programmatic direction for VolED and VCP to ETQC;

   d. Evaluate the voluntary program services offered through Defense Activity for Non-Traditional Education Support (DANTES) and American Council on Education (ACE) and recommend changes to the Inter-service Voluntary Education Board (IVEB) for contract of service adjustments;

e. Conduct educational outreach to active duty, reserve, and civilian personnel, and other support programs in order to familiarize eligible service members and employees with all aspects of the Career Investment programs;

f. Coordinate overall budget for the Voluntary Programs to include financial assistance and the submission of budgetary requirements and needs to FC-B; and

g. Work in partnership with Commandant (CG-128) to establish policy for and execute DHS Academic Programs.

4. Education Services Officers (ESOs) must:

a. Serve as full-time and collateral duty ESOs report to local commands;

b. Receive programmatic direction from FORCECOM Voluntary Education and Credentialing Programs;

c. Execute the Coast Guard's Voluntary Education Program in accordance with this Instruction and the Education Services Officer Procedures located at https://www.forcecom.uscg.mil/Our-Organization/FORCECOM-UNITS/ETQC/Voluntary-Education/Education-Service-Officers/ ;

d. Ensure the command approval to enroll in off-duty education and training courses. The Commanding Officer (CO), ESO, or command designee may grant approval; however, tuition assistance (TA) and credentialing assistance (CA) approval is not delegated below Executive Officer, Executive Petty Officer, or Deputy levels. Refer to Chapter 13 for additional information; and

e. Provide educational outreach to active duty, reserve, and civilian personnel, and other support programs to include providing guidance on Military Advanced Education and DHS Academic Programs.

5. Education and Training Quota Management Command (ETQC) must:

a. Function as the execution section of the Training System for Advanced Training executed within a temporary duty status;

b. Manage all Class "C" School students' status in the Systems of Record internal and external to the Coast Guard;

c. Issue Formal Training Travel Orders (TONOS) for Active Duty, Active Duty for Operational Support (ADOS) over 180 days, Extended Active Duty (EAD), Civilian, and Auxiliary members;

d. Issue no-cost training orders for Reservists. Reservists are responsible for acquiring Reserve Training Orders;

e. Manage the adjudication of TA, Voluntary Education Services applications, refund or debt collections, and audit or waiver requests;

f. Serve as the central processing point for registrar services and voluntary education credentials;

g. Provide technical support to ESO networks; and

h. Publish the Education Services Officer Procedures, to include TA, Registrar Services, and Credentialing Assistance (CA).

6. Personnel Service Center (PSC) must:

a. Function as the execution section of the Training System for matters concerning training which requires a permanent change of station (PCS) to an assigned TAB;

b. Manage Class "A" School assignment processes;

c. Manage Class "A" School students' assignment status in the System of Record for training, internal and external to the Coast Guard;

d. Issue TONOs for Active Duty service members who PCS to a Class "A" School;

e. Issue TONOs for service members who PCS to specialty training assigned to a TAB; and

f. Coordinate with ETQC for the enrollment of service members in the System of Record for training, internal and external to the Coast Guard, when the service member is assigned to a TAB for specialty training.

7. Headquarters Programs must:

a. Establish performance requirements that align with programmatic goals;

b. Partner with FORCECOM to resource new training and education requirements;

c. Identify Program Managers (PM), Course Managers (CM) for program sponsored Formal Training courses, Student Managers (SM) for Advanced Education programs, and Contracting Officer Representatives (COR) for commercially contracted courses;

d. Manage sponsored training programs in accordance with FORCECOM directives;

e. Manage sponsored Advanced Education programs in accordance with FORCECOM directives;

f. Provide validated throughput requirements during the Formal Training Quota Build Process;

g. Review course data in accordance with FC-T annual guidance prior to the Formal Training Prioritization Process;

h. Provide resources to support analyses and performance support interventions (e.g. Electronic Performance Support System (EPSS), Class "C" School, Structured On-the-Job Training (SOJT);

i. Provide contract details for commercially contracted courses to FC-T;

j. Support Mandated Training in accordance with Chapter 8 of this Instruction; and

k. Resource and serve as information system owner for all information technology systems, simulators, and training aides operated in support of training courses.

8. Commanding Officer or Officer-in-Charge must:

a. Assign a collateral duty Unit Training Officer (UTO) or Unit Training Petty Officer (UTPO) when full-time UTOs or UTPOs are not billeted at a unit;

b. Assign a collateral duty Educational Services Officer (ESO) when full time ESOs are not billeted at a unit;

c. Ensure all training requirements are met and notifications (referencing enrollments, cancellations, substitutions, and waiver submissions) are made to stakeholders, including the student, ETQC, and applicable Program Office; and

d. Approve unit training drills and exercises.

9. Executive Officer or Executive Petty Officer must:

a. Supervise the administration and execution of the unit's training program; and

b. Act as Chairman of the Unit Training Board (UTB).

10. Units must:

a. Maintain the most critical elements of unit level Enlisted Rating Advancement Training System (ERATS) to ensure system integrity;

b. Identify gaps in ERATS policy at the officer level and contact FC-T for direction;

c. Maintain a list of designated Professional Development Coaches (PDC) by rating;

d. Monitor message traffic and ensure Command, Unit Training Officer (UTO), and student are fully aware of student status changes, course pre-requisites, and applicable program determinations;

e. Verify all prerequisites (i.e. medical readiness, course specific pre-requisites, physical fitness tests, pre-tests, qualifications) are met before sending student to TRACEN for formal training; and

f. Unit Commanders must provide adequate support and resources to the unit personnel to enable timely completion of assigned formal training.

11. <u>Unit Training Officer (UTO) or Unit Training Petty Officer (UTPO) must</u>:

a. Identify and coordinate training needs for unit, including but not limited to pre-arrival training;

b. Screen and submit Electronic Training Requests (ETR);

c. Develop and manage unit training plans. Convene and lead Unit Training Board (UTB) meetings;

d. Identify and schedule mandatory training for authorized group training;

e. Track individual members' progress towards completing mandatory training quarterly;

f. Record completed Personnel Qualification Standards (PQS) into the Human Resources (HR) system of record, Direct Access (DA), for service members assigned to the unit;

g. Manage unit training and drills. Document required training in accordance with approved policy;

h. Access information and manage entries in the competency management system; and

i. Manage Job Qualification Requirements (JQR) completion for either unit specific training requirements or drills.

12. <u>Rating Force Master Chief (RFMC) must</u>:

a. Act as the principal advocate for their rating or program area;

b. Ensure rating performance and training requirements align with organizational missions;

c. Validate ERATS performance and monitoring standards, including authority to audit individual ERATS records;

d. Work with programs to identify professional credentials and licenses that support normal enlisted performance requirements; and

e. Refer to Chapter 15, Section F, for more specific training responsibilities, and Reference (o) for additional workforce responsibilities.

13. Rating Knowledge Manager (RKM) must:

   a. Serve as a core position responsible for managing a rating's performance support and training material;

   b. Manage a rating-specific website housed on the ERATS portal page;

   c. Serve as the rating subject matter expert; and

   d. Refer to Chapter 15, Section F for additional responsibilities.

14. Supervisors must:

   a. Identify members' training needs;

   b. Provide adequate support and resources to support learning, performing, and development; in particular when a member is completing remote full-time training at the unit;

   c. Counsel and support personnel regarding career development and training to improve performance;

   d. Ensure the completion of Unit or Job Specific PQS;

   e. Evaluate the impact training has on job performance improvement; and

   f. Provide opportunities for unit training, Formal Training, education, and professional development.

15. Individuals must:

   a. Manage career and professional development;

   b. Research thoroughly and choose a designated career path (e.g., rating, specialty, and sub-specialty);

   c. Seek developmental opportunities that support chosen career path;

   d. Complete the Enlisted Professional Military Education (EPM-E) requirements for the respective pay grade in accordance with this Instruction. (Enlisted only);

   e. Complete unit training as required;

   f. Complete qualification requirements as set forth by unit expectations;

g. Attend and complete Formal Training to include advanced and specialized as required;

h. Earn competencies specific to job requirements;

i. Research educational opportunities for personal and professional growth;

j. Following VolED or AE degree completion, submit official transcript of their academic record documenting the awarded degree to ETQC in accordance with the procedures published on the ETQC portal page; and

k. Submit recently acquired training or education into member's Electronically Imaged-Personnel Data Record (EI-PDR) prior to 1 July of each year.

CHAPTER 2 FORMAL TRAINING

A. General

1. <u>Formal Training</u>. A course developed to fulfill a programmatic requirement providing skills and knowledge training to improve an individual's performance.

2. <u>Criteria</u>. A course must meet all of the following conditions to be considered Formal Training:

    a. Is produced and delivered by either a Coast Guard Training Center (TRACEN), Other Government Agency (OGA), or a commercial contractor.

    b. Occurs within one or more of the following environments: residential, exportable, remote, online, structured-on-the-job, or blended-learning.

    c. Has a Coast Guard course number and is managed within the Training System (TRASYS).

B. Class of Formal Training

1. <u>Accession Training</u>. Accession Training or Service Entry Training Programs provide students entering the Coast Guard with a foundation of knowledge and skills pertaining to the military environment. Service Entry Training Programs include both educational programs managed by Commandant (CG-1) (e.g., Coast Guard Academy (CGA) and College Student Pre-Commissioning Initiative (CSPI) and training managed by FC-T within the Formal Training umbrella (e.g. Recruit Training, Depot, and Officer Candidate School (OCS)).

2. <u>Class "A" Schools</u>. Class "A" Schools make up the enlisted rating entry performance training, an integral part of the Enlisted Rating Advanced Training System (ERATS). Each Class "A" School prepares enlisted students to perform the initial technical duties in a specific rating.

3. <u>Class "T" Schools</u>. Class "T" Schools are transitional performance training. Each Class "T" School prepares a Coast Guard student (e.g., petty officer or a commissioned officer) for a new role. (e.g.: Criminal Investigator Training Program (CITP), Basic Lawyer). Class "T" School attendance is required for a student to transition to the new career track (e.g.: Coast Guard Investigative Service (CGIS) Agent, Lawyer).

4. <u>Class "C" Schools</u>. Class "C" Schools are advanced training. Each Class "C" School is designed to provide advanced or specialized skills and knowledge to perform a task, or group of tasks required by a specific billet, mission, or unit type. (e.g.: Basic Boarding Officer, Tactical Action Officer (TAO), MK-92.)

5. <u>Specialty Training</u>. Class "C" Schools which further a specific specialty through advanced training. Specialty training may be comprised of a single Class "C" School

which is 20 weeks or more in duration or an extensive training pipeline of Class "C" Schools, where the cumulative duration of the training exceeds 139 days.

6. Provisional Course. A Provisional Course is a Formal Training Course, most frequently a Class "C" School, established quickly using a streamlined process and for which the Coast Guard has assumed additional risk in order to meet an urgent field need. A provisional course will not exceed a maximum of three (3) years once established. At the three-year mark, the course either transitions formally to the TRASYS or expires.

7. Mandated Training. MT is Formal Training specifically mandated for an explicit group of employees in accordance with federal, state, or local law (statute) or by governing directive. MT must be tied to a billet or position through a specific competency.

8. Enlisted Rating Advancement Training System (ERATS). ERATS supports the Coast Guard by preparing enlisted students for advancement. Two foundational documents, the Rating Performance Qualifications (RPQ) standards and Enlisted Performance Qualification (EPQ) standards, establish the framework for all enlisted advancement training programs and assessments.

C. Prerequisites and Disenrollment

1. Prerequisites. Units and students must ensure course pre-requisites and physical training requirements have been met, to include Weight and Body Fat Standard Compliance, prior to submission of a request for training or execution of Orders to Training (e.g.: application for Class "A" School, submission of ETR for Class "C" School). FORCECOM reserves the right to seek reimbursement from units whose members are disenrolled having arrived for training and have not met and/or completed pre-requisites.

2. Disenrollment. Disenrollment is the removal of a student who has not completed training from active student status in a Formal Course. Disenrollments are categorized as either Fault or no-Fault. Qualified students who receive a no-Fault disenrollment may request consideration to attend a Class "A" School for a critical rating and waive the requirement to return to their previous unit or reassignment.

3. Fault Disenrollment. Fault disenrollment is the removal of a student from a formal course resulting from a student's own action to include cheating, misconduct, injuries not in the line of duty, non-judicial punishment (NJP), or voluntary disenrollment.

   a. Class "A" School students will be reassigned or returned to their previous unit, subject to the policy outlined in Reference (o). The student is prohibited from reapplying to any Class "A" School for six months from the date of disenrollment. However, Commanding Officers and Officers in Charge may, at their discretion, request PSC (epm-2) waive this requirement. Commanding Officers and Officers in Charge should consider the severity of the offense before requesting a waiver.

   b. Class "C" School students will return to their unit without credit for the training and

must be restricted from enrolling in the Class "C" School for one year from the date of disenrollment. Note: Class "C" School students assigned to a school location for a long school will be reassigned subject to the policy outlined in Reference (o).

4. <u>No-Fault Disenrollment</u>. No-Fault disenrollment is the removal of a student from a formal course due to issues, which are not the result of negative actions or inactions on the part of the student. Examples include failure to meet academic or physical fitness requirements despite student's best efforts to succeed, injuries in the line of duty, bona fide family emergencies, or victims of sexual assault who were assaulted after accession into the Coast Guard.

   a. Class "A" School students will be reassigned or returned to their previous unit, subject to the policy outlined in Reference (o). The student may resubmit another Class "A" School application immediately upon disenrollment. After two no-fault disenrollments, students, excluding victims of sexual assault, are prohibited from reapplying to any Class "A" School for one year from the date of the second disenrollment.

   b. Class "C" School students will return to their unit without credit for the training. The student may resubmit another ETR for the training immediately upon disenrollment. Note: Class "C" School students assigned to a school location for a long school will be reassigned in accordance with Reference (o).

D. Delivery Methods

1. <u>Resident Training</u>. Resident training is a course where students travel to a specific location (i.e., TRACEN) to acquire instruction. Qualified instructors deliver training as appropriate for specific learning tasks and within diverse learning environments: classroom, laboratory, boat, etc. Resident Class "C" School courses less than 20 weeks in length require TDY orders. Resident courses that are 20 weeks or longer in duration require PCS orders. Specific information, including course convening dates, PM, and pre-requisites, is available through ETQC's website: <u>Education & Training Quota Management Command (sharepoint-mil.us)</u>.

2. <u>Exportable Training</u>. Exportable Training is instructional training which is conducted at a local unit by training teams or instructors from a resident training facility using resident course materials. It can also be facilitated at a designated temporary location away from a training center using those resident course materials. Students within 50 miles of the location for the Exportable Training may travel to attend the course outlined in Reference (p).

3. <u>Non-resident Training</u>. Non-resident training, for example, Self-Paced eLearning (SPeL); Remote Training, or Structured On-the-Job Training (SOJT), is training that does not require students' presence in a formal classroom or laboratory setting. Most are short-term and many are delivered via the LMS or other electronic means.

a. <u>Remote Training</u>. Interactive training delivered in a remote environment. Students attend course with live video conference instruction that is often followed by self-paced study. Students demonstrate their knowledge of each competency through full-class activities, self-paced work/exercises, and a cumulative capstone.

b. <u>Self-Paced eLearning (SPeL)</u>. Instruction that leverages technology to deliver learning solutions and can be accessible anytime, anywhere.

c. <u>Structured on-the-Job Training (SOJT)</u>. SOJT is performance-based training that is intentionally designed to occur at or near the learner's unit to achieve standard performance outcomes reliably and predictably in a structured way. SOJT may be Formal Training or experiential learning associated with pipeline training and provides essential skills required for newly assigned billets or duties.

4. <u>Blended Learning</u>. Blended learning is a combination of delivery methods, outlined above, in a single formal course.

CHAPTER 3   FUNDING

A. General

The Coast Guard uses centrally funded allotment codes (AC's) for funding formal training and education for Active Duty, Reserve, Civilian, and Auxiliary personnel. This Chapter presents an overview of funds utilized. The Financial Resource Management Manual (FRMM), COMDTINST M7100.3 (series) outlines more specific guidelines for these funds. Follow the guidance in the FRMM when discrepancies exist between this Manual, Commandant Change Notice, and the FRMM.

B. FORCECOM AC

FORCECOM AC (legacy AFC56) funds are for formal training performed as temporary duty (TDY) for civilian and military personnel, including reserve members attending accession training as identified in the Reserve Policy Manual, COMDTINST M1001.28 (series), reserve members on Active Duty Special Work – Active Component (ADSW-AC), Extended Active Duty (EAD), Title 10 US Code 12301(d) and Title 10 USC 12302 orders, and members of the Auxiliary. Items funded include travel and per diem for training performed as TDY and tuition for such training. Items include the following:

1. Accession training

2. Advanced education

3. Voluntary education

4. Voluntary credential (COMDTINST 1540 series)

5. Class "C" training

6. Class "A" training

7. Tuition Assistance

8. Mandated Training

C. Reserve (G-R) AC

G-R AC (legacy AFC90) funds are Reserve Training Program Expense, which provides funding for all necessary expenses for the Coast Guard Reserve who are not members attending accession training as identified in the Reserve Policy Manual, COMDTINST M1001.28 (series).

D. PSC AC

PSC AC (legacy AFC20) funds are for travel and transportation expenses associated with Permanent Change of Station (PCS) orders for military personnel and their dependents. It also funds training that is 20 weeks or more in duration including travel to and from training location. More information on PCS and legacy AFC20 is available in the Personnel Manual, COMDTINST 1000.6 (series).

E. Unit AC

Unit AC funds cannot fund travel, tuition, and related costs for which funding is otherwise provided by Coast Guard through FORCECOM ACs. Units requesting to utilize unit funds to attend FORCECOM formal training should seek guidance from Commandant (CG-84) and/or FORCECOM (FC-B).

Unit ACs must fund all Unit Funded Training. Expenses chargeable to Unit AC's include travel, tuition and related costs related to professional development (courses based on individual's needs, local unit need or more mission specific training).

CHAPTER 4   TRAINING MANAGEMENT

A. General

Chapter 2 defined Formal Training with the intention of assisting Unit Training Officers (UTO) and Unit Training Petty Officers (UTPO) with the coordination of training and maintaining unit and individual mission readiness. This Chapter provides an overview of how training is organized and managed for the entire organization.

B. Human Performance System

The Human Performance System enables mission execution through the integration of accession, training, education, and professional development. This system drives the integration of skills and knowledge; tools and resources; consequences and incentives; selection and assignment; and motives and preferences across the organization. The Human Performance System guides the execution of the Training System. The objectives of the Human Performance Systems are to:

1. Ensure consistency and repeatability by employing standardized and systematic methods within all elements of the Human Performance System.

2. Respond to existing and emerging needs by proactively engaging and partnering with customers to improve human performance.

3. Achieve otherwise unobtainable efficiencies or capabilities by using blended performance solutions while leveraging technology to support performance solutions.

4. Achieve otherwise unobtainable efficiencies or capabilities by using blended performance solutions while leveraging technology to support performance solutions.

5. Manage and allocate resources to organizational priorities through measures of efficiency and effectiveness.

6. Common terminology and acronyms are defined in Appendix A. and B. of this instruction.

C. Training Triangle

The Coast Guard's Formal Training is supported by the efforts of personnel organized in three areas referred to by the Training Triangle, as illustrated in Figure 4.1. Program or Course Managers identify performance requirements, provide resources, and manage quotas. FC-T's Training Managers (TMs) validate training needs, manage curriculum for advanced training, i.e., Class "C" Schools, and manage resources and funding in conjunction with FC-B's Resource Managers (RMs). TRACENs develop and deliver courses and identify training resource needs. Details of the roles of the three areas are list in table 4.1. Working together, the three entities ensure Coast Guard members and civilian employees receive the most effective training through efficient use of resources. Specific guidance concerning Auxiliary

training management can be found in Reference (q).

FC-T and FC-B

Program/ Course Manager　　　　　　　　　　　　　**Training Center Source**
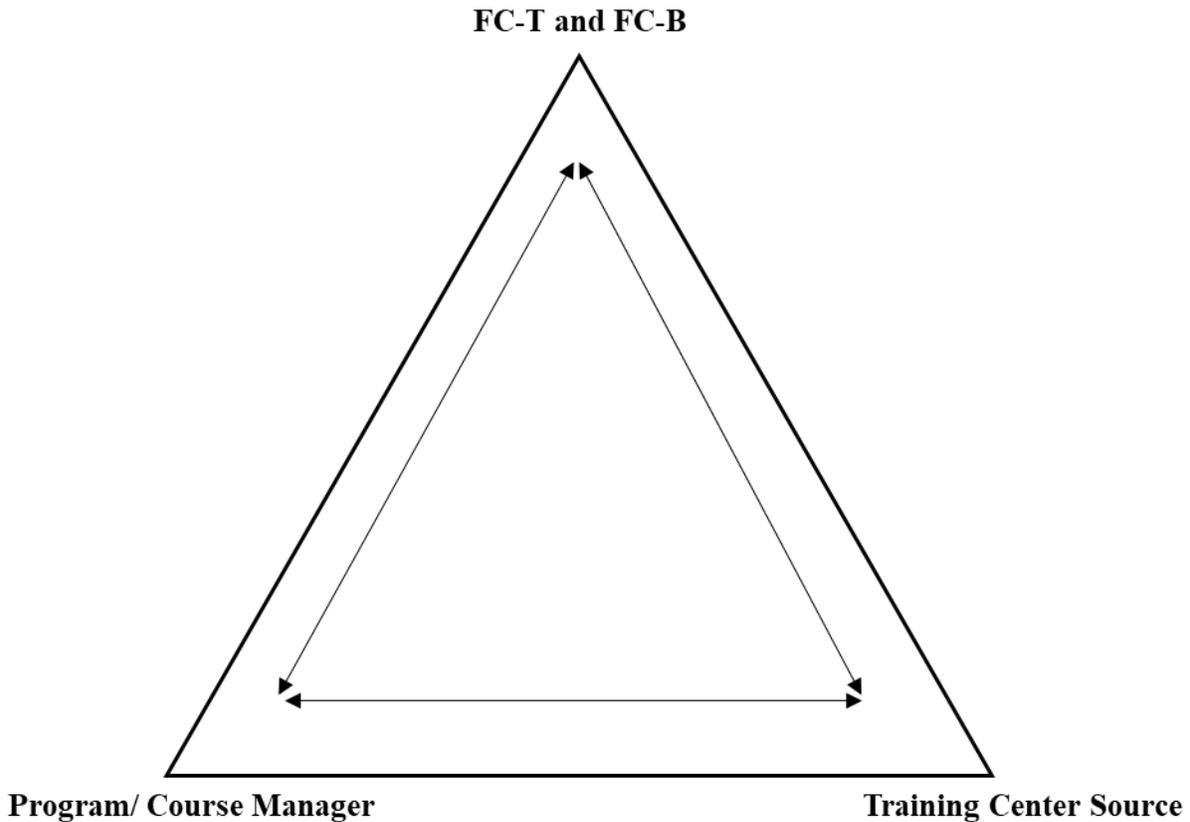
Figure 4.1 The Coast Guard Training Triangle

Program Manager	FC-T and FC-B	Training Centers
• Identify or validate requirements • Identify performance issues • Request and fund analyses • Partner with FORCECOM to initiate RPs • Review curriculum outlines • Manage quotas • Select or enroll students in "slated" courses	• Clarify requirements • Manage performance analysis • Review curriculum outlines • Manage Advanced Distributed Learning (ADL) • Adjudicate schedule conflicts • Manage Resources (RMs)	• Design and develop curriculum • Conduct training • Maintain curriculum • Triennial review of curriculum outline • Schedule course convenings • Conduct level 1-3 evaluations

Table 4.1 Management of Advanced Training

D. Training Requirements

1. Requirements. Service members are ultimately responsible for identifying and pursuing individual training requirements. PMs establish performance and training requirements for members in their content specialty, i.e., cutter requirements per Reference (r). FC-T manages Formal Training to support the programmatic requirements.

2. <u>Master Training Lists (MTLs)</u>. MTLs provide a sustainable and predictable forecast for unit-type training requirements. MTLs enable billets to be assigned competencies and provide units and the organization total visibility of a unit's workforce readiness. Although MTLs are not mandatory, they are a valid and reliable method for ensuring training meets programmatic needs. Promulgation of MTLs and subsequent changes thereof are completed by the Program Manager after review by FORCECOM (FC-T), ETQC, and stakeholder PMs/CMs as deemed necessary.

E. Mandated Training (MT)

MT is a broad category of Formal Training required to introduce, reinforce, or clarify the law. It is designed to improve the function of the federal government, to protect the safety of its people, and to influence the behaviors and attitudes of the workforce. MT is critical to improve the function of the Coast Guard and to protect the safety of its people. MT is required for the entire workforce or for a specific class of employees. Unit Commanders must provide adequate support and resources to the workforce to enable timely completion of MT. The steps for implementing MT are as follows:

1. Performance analysis must guide the development of MT, as deemed practical by FC-T.

2. The PM must evaluate MT on a regular cycle to determine effectiveness.

3. FC-T must provide written authorization prior to executing new MT that will impact more than half of the workforce or prior to establishing a recurring training requirement.

4. The Learning Management System (LMS) must be utilized to deliver MT when deemed practical and appropriate by FC-T.

5. Position Based eLearning (PBeL) is a subset of MT, and courseware is designed and developed for an explicit group of employees, contractors, Auxiliarists, or military personnel. PM must tie PBeL to a billet or position identified by a specific competency.

F. Unit Training Board.

Units must establish a Unit Training Board. The board's purpose is to identify training requirements, establish and maintain training policy, set priorities for training, develop a training plan, and coordinate qualification boards. The Unit Training Board typically consists of the Executive Officer, Unit Training Officer or Unit Training Petty Officer, Education Services Officer, and Department Heads. Units must list members by name or position. Units with 10 or fewer members are not required to have a Unit Training Board, as these responsibilities must be met by the UTO or UTPO. A Unit Training Instruction must, at a minimum, document the following information:

1. Membership on the Training Board by name or position.

2. On Board Training Team (OBTT) membership by name (cutters).

3. Internal routing for exercise evaluation sheets, department or divisional training records and qualification records for the Watch Qualification System (WQS), Personnel Qualification Standards (PQS) or Job Qualification Requirements (JQR).

4. A list of WQS, PQS, and JQR Qualifiers or Verifying Officers by subject matter and name or position.

5. A list of designated Professional Development Coaches (PDC) by rating.

6. Human Resources System of Record (DA), data entry, supervision, and approval responsibilities.

G. Competency Management

PMs must create and manage competencies in accordance with Reference (s). Enlisted ratings require members to receive competencies in specific areas prior to advancement.

H. Training Documentation

Direct Access (DA) is the Human Resources System of Record that includes Formal Training and competency codes. Competencies are recorded either in DA in accordance with Reference (s) or in the Current task/certification tool (Training Management Tool (TMT)). The task/ certification tool transmits Competency Codes to DA upon competency certification.

1. Members are ultimately responsible to ensure their personal record in DA documents all completed competencies, Formal Training, qualifications, and education.

2. Table 4.2 lists items that are documented in DA and the task/certification tool. Reference (t) provides information regarding TMT requirements. Reference (r) provides additional information regarding ALMIS requirements.

Direct Access (DA)	Current task/certification tool (TMT/ALMIS)
Competencies (listed in competency dictionary)	Competencies
Advanced Training	Mandated Training (MT)
Specialized Training	WQS, PQS, or JQR
Advanced Education	Currency Maintenance Requirements
Voluntary Education	Drills or Exercises

Table 4.2 Training Documentation

3. Officer and Enlisted personnel are strongly encouraged to maintain their own training records as they transfer to units and progress through their career. These records are valuable when resolving future inconsistencies in DA. The use of the Individual Training Record folder (CG-5285) is optional; however, the folder provides a systematic means to organize personal training records. Documents are arranged as shown in table 4.3

Organization of Training Record (CG-5285).

Folder Section	Recommended Content
Inside Front Cover	Completed indoctrination check-off sheets
Section I	Copies of WQS, PQS, or JQR qualification and re-qualification letters
Section II	Formal school completion letters or certificates
Section III	Copies of Rating Performance Qualifications and Enlisted Performance Qualification (RPQ and EPQ) completions and other correspondences related to advancement or promotion
Section IV	Record of lectures attended on Mandated Training, departmental or divisional training, or those associated with professional development programs (law enforcement, OOD training, etc.)
Section V	Miscellaneous training records and information.

Table 4.3 Organization of Individual Training Record folder (CG-5285)

I. Legacy Learning Management System (LMS)

An LMS is a software tool designed to manage user learning activities. The Coast Guard's Legacy LMS is used primarily for "launch and track" of eLearning course modules as well as the delivery of qualification e-Tests. Legacy LMS completions are transmitted to DA.

CHAPTER 5   WORKFORCE DEVELOPMENT

A. General

This Chapter discusses workforce development resources and programs available for Coast Guard personnel, including military, civilian, and auxiliary. Workforce Development is the combination of Formal Training, education, individual qualification programs, and professional development and is vital to maximizing the continuous growth of a mission ready total workforce.

B. Resources

Workforce development resources available to military members and civilian employees of the Coast Guard include personnel, programs, and tools established to provide support in the development of the member or employee as an accomplished performer in their work.

1. Unit Training Officer (UTO) and Unit Training Petty Officer (UTPO). UTO and UTPO are collateral duty positions. Personnel assigned to each role manage Mandated Training, advanced training, unit specific training. They maintain training and educational information for individuals using Direct Access (DA) and the current task/certification tool. UTOs and UTPOs submit and manage electronic training requests (ETR) for individuals, electronically maintain unit training equipment and aids, evaluate all training, and prepare short- and long-range unit training plans. Responsibilities are listed in Chapter 1 of this Instruction.

2. Mentoring Program. The Coast Guard Mentoring Program offers expanded leadership opportunities and connection for our active duty, reservist, and civilian workforce. The program goes beyond traditional mentoring and offers three types of mentoring "tracks", or connections, tailored specifically to individual needs and scheduling preferences. It's powered by software that can automatically match thousands of mentors and mentees simultaneously based on their professional interests and backgrounds. Additional information on the Coast Guard Mentoring program can be found here Coast Guard Mentoring Program (uscg.mil).

3. Education Services Officer (ESO). ESOs administer the voluntary educational programs by guiding members through the obtainment and completion of educational programs and courses and credentialing opportunities. ESOs administer non-resident courses, proctor tests, coordinate boards for officer accession programs, and manage the Unit Learning Centers as discussed in Chapter 1 and below. Depending on the size and location of a unit, ESOs may be either a full-time position or a collateral duty. Managed by FORCECOM (FC-CI) and the Education and Training Quota Management Command (ETQC), ESO guidance is available in this Instruction Chapter 13 and other pertinent information is outlined on the ETQC website at Education & Training Quota Management Command (sharepoint-mil.us).

4. CG Cool. The Coast Guard's Voluntary Credentialing Program (VCP) was established to meet the requirements of Section 551 of National Defense Authorization Act (NDAA)

2015 to carry out a program to enable members of the armed forces to obtain, while serving in the armed forces, professional credentials related to military training and skills that— (1) are acquired during service in the armed forces incident to the performance of their military duties; and (2) translate into civilian occupations. For more information on CG Cool, refer to COMDTINST 1540.10.

5. Military to Mariner (M2M). The Coast Guard M2M Program is a subset of the Voluntary Credentialing Program. The M2M Program mission is to enhance professionalism of the workforce by supporting Coast Guard Service members in various career stages as they identify and pursue a merchant mariner credential that best aligns to their experience and time in service. The M2M Program is here to help guide these members through the National Maritime Center's (NMC) merchant mariner credentialing process. Current service members can access M2M Program's SharePoint site at: Voluntary Credentialing Program (VCP) - Military to Mariner (M2M). For more information on M2M, refer to COMDTINST 1540.2.

6. Unit Learning Centers. Unit Learning Centers (LC) provides an environment conducive to learning for the delivery of computer-based training and assessments. LCs supply the tools, computer workstations with Internet access and other equipment, to enable both professional and personal development, including enhancing the opportunities for service members to pursue voluntary distance education activities and required e-learning. The result is a more modernized ready learning workforce. LCs support remote training, thereby reducing travel costs and days away for service members in training while increasing the throughput for courses.

7. Professional Development Coach (PDC). The PDC may be any person, E-5 or above, designated by the Commanding Officer or Officer-in-Charge as competent to sign off Rating Performance Qualifications (RPQs) or Enlisted Performance Qualifications (EPQs). The primary goal of the PDC is to accelerate student learning by means of motivating, demonstrating, guiding, and providing advice and constructive feedback within the framework of on-the-job training. The PDC is assigned from within the member's occupational specialty rating, as they hold the requisite trade expertise. The PDC may be assigned externally from a different unit. As a last option, a commissioned officer, civilian employee, or member from outside a member's rating is designated. PDC guidance is available in Appendix A. of all RPQs and throughout this Instruction, with the roles and responsibilities discussed in Chapter 15.

8. Civilian Career Management (CCM). The purpose of Civilian Career Management is to develop and maintain a living framework that identifies and maximizes civilian professional development opportunities, pinpoints gaps in civilian career development, coordinates and manages a robust catalog of civilian career professional development. Training opportunities are available in conjunction with Coast Guard policy for all Coast Guard civilian employees including Appropriated Fund, Non-Appropriated Fund, and Wage Grade employees. More information is outlined on the CCM website at: Civilian Career Management Team - Home (sharepoint-mil.us).

9. <u>Individual Qualification</u>. Watch Qualification Standards (WQS) and Personnel Qualification Standards (PQS) are qualification systems wherein certification of a minimum level of competency is required prior to qualifying to perform a specific job. However, WQS and PQS are not part of the enlisted advancement system. JQRs are locally produced PQS-type manuals and are different than formally promulgated PQS. Each unit produces JQRs when no existing PQS covers a specific job.

Respective PMs manage WQSs and PQSs relevant to their world of work. They also create and promulgate changes to WQSs or PQSs. Deferment of a task postpones task completion due to lack of opportunity for completion. The service member must submit requests for deferments to the PM for approval. A PM approves any requests to tailor PQS to meet specific unit requirements, including concerns and recommendations.

School attendance, such as a Class "C" School, may satisfy specific portions of PQS books. Training Center Instructors/staff must not sign off PQS tasks for students. Training Centers may make equivalency determinations and may provide students with a letter identifying PQS tasks accomplished in the Class "C" School.

10. <u>Tactics, Techniques, and Procedures (TTP)</u>. TTP aligns policy, doctrine, and assessments to provide step-by-step processes and best practices for optimized performance. TTP is not an authoritative document and does not contain policy directives. Rather, TTP is a compilation of best practices that contains step-by-step procedures grounded in existing policy and validated by accomplished performers. TTP solutions can be found here: <u>COAST GUARD TACTICS TECHNIQUES AND PROCEDURES (sharepoint-mil.us)</u>.

11. <u>Electronic Performance Support System (EPSS)</u>. An EPSS is any computer software program or component that improves user performance with a specific set of clearly defined tasks. EPSS aims to help an organization reduce the cost of training while increasing productivity and performance. It usually integrates two or more different performance interventions together, such as e-learning and a job aid. Performers complete tasks with a minimum amount of external assistance.

EPSS solutions are delivered to the workforce via the EPSS Catalog. The EPSS Catalog can be accessed via the Training & Education Page on CG Portal, or directly via https://epss.uscg.mil . Many EPSS solutions contain sensitive or proprietary information. Users must be aware of the sensitivity of a solution prior to downloading or transferring, and users are responsible for ensuring a downloaded EPSS is the most current version.

12. <u>Record of Professional Development</u>. Military personnel are encouraged to report all types and sources of education and training The Record of Professional Development, Form CG-4082, allows officer and enlisted members, both active and reserve, to include education, training, professional certifications, licenses, and other information in their record that is not already captured elsewhere. The Employee Summary Sheet (ESS) reflects Coast Guard qualifications, specialty codes, and language proficiency captured in DA.

Form CG-4082 is an optional document, not required in a member's EI-PDR. Members submit an up-to-date, complete, and correct Form CG-4082 for consideration by selection boards, screening panels, or assignment officers at their own discretion. Commanding Officers (COs) or Authorized Officials (AOs) must certify that all information submitted on the form is accurate and correct based on actual achievement of the member and authorized in accordance with this instruction. Authorized entries are outlined in table 5.1.

Because Form CG-4082 is an optional document, missing, incomplete, or erroneous information in Form CG-4082, or the absence of Form CG-4082 in a record is not a material error under 14 U.S. Code Section 263, or the Special Selection Board Policy in Article 6.B.13 of Reference (u).

Members are not to use CG-4082 in lieu of an official academic transcript to document the completion of a formal education program.

Record of Professional Development **Form CG-4082 – Authorized Entries**
- Professional credentials, certificates, and licenses not found on a member's ESS. Examples may include Professional Engineering licenses, Certified Public Accountant, Airline Transport Pilot, Certified Government Financial Manager, Certified Defense Financial Manager, and Merchant Mariner licenses.   - Individual resident courses at accredited colleges, supported by an in-progress transcript. Courses not leading to a degree must be accredited in order to be included on Form CG-4082. These courses must be removed from Form CG-4082 upon completion of the degree and submission of the completed transcript.   - Note: In progress transcripts will only be used by commands to validate Form CG-4082 and will not be submitted to PSC-bops-mr with Form CG-4082.   - Other Government Agency(s) (OGA) courses, DHS, OPM, etc., not designated as Coast Guard Class "C" Schools.   - Published articles, noting the article's bibliographic information. Articles must be professional articles as opposed to media or public relations-based articles. Articles published in Defense Weekly, Military Operations Research Journal, or a peer reviewed publication would be examples of appropriate articles to include.   - Professional seminars, such as the annual conference of the Association for Talent Development.   - Professional awards. Examples include Douglas A. Munro Award for Inspirational Leadership, Coast Guard Engineer of the Year, Swivel Shot Award, etc.   - For Reservists, civilian achievements pertinent to Coast Guard career.   - Non-Recordable Items. The below items should not be included on Form CG-4082.   - Professional and technical readings.   - Any individual course work that is already noted on the ESS, Administrative Remarks Form (CG-3307), or a DUINS OER.   - Personal qualifications that have an associated competency code listed in the competency dictionary.   - Officer Specialty Codes.   - Specialty Insignias.   - Coast Guard resident courses that appear on the ESS under the training section.   - Military Awards (medals and ribbons).   - Flag Letters.   - For Reservists, civilian achievements not associated with Coast Guard career.

Table 5.1 Record of Professional Development, Form CG-4082 – Authorized Entries

CHAPTER 6   SERVICE TRAINING PROGRAMS

A.   General

Service Entry Training Programs provide members entering the Coast Guard with basic, foundational knowledge and skills pertinent to the military environment. The programs outlined in the following paragraphs present a common technical framework which allows for performance of fundamental jobs. Reference (u), Reference (v), and Reference (w) outline eligibility requirements, application procedures, and program details, as well as additional opportunities based on service needs.

B.   Enlisted Programs

1. Recruit Training. Coast Guard recruit training indoctrinates and develops job skills for recruits to perform as junior enlisted members. Furthermore, this training prepares individuals for Active Duty and Reserve careers and provides a smooth and orderly transition from civilian to military life by developing a sense of pride and identification with the U.S. Coast Guard. Graduates are rated E-2 or E-3.

2. The Direct Entry Petty Officer Training program (DEPOT). This course indoctrinates Petty Officers (E-4 and above) entering the Coast Guard as either prior service applicants for active duty or as applicants of the Coast Guard Reference (x). Upon graduation, prior service applicants and reservists will enter the Coast Guard as Petty Officers.

C.   Officer Commissioning Programs

FORCECOM (FC-T) collaborates with the Assistant Commandant for Human Resources (CG-1) to develop the Officer Accession Plan (OAP). Programs are determined during the annual OAP development. Coast Guard Recruiting Command establishes deadlines for application packages and for selection panel dates except in cases associated with Coast Guard Academy admittance. Enlisted Coast Guard members may apply for Officer Programs provided they meet all requirements for the specific program.

1. U.S. Coast Guard Academy (CGA). The Academy is a four-year accredited college program which provides an environment renowned for academic excellence and for the development of leaders combined with thorough rigorous professional training that prepares students for meaningful Coast Guard careers. The Academy educates service-ready officers to serve with skill, commitment, and character. Graduates receive a bachelor's degree and a Commission as an Ensign. Information on the application process, requirements, and guidelines is available at http://www.uscga.edu .

2. Officer Candidate School (OCS). OCS is a 17-week course in leadership and management, seamanship, navigation, law enforcement, and military subjects. Classes convene periodically throughout the year depending on the needs of the Service, in accordance with requirements established in Reference (u), and in accordance with ASVAB/AFCT/AFQT scores cited in Reference (v). OCS does not allow ASVAB, AFCT, or AFQT score waivers.

3. <u>Direct Commission Officer (DCO) School</u>. DCO programs allow the Coast Guard to obtain officers with specialized training based on the needs of the Coast Guard. DCOs must serve in initial assignments that reflect specialized training and experience. DCO School is the initial course of instruction used for DCO indoctrination and orientation. The length of the course is dependent on the selectee's prior military experience.

4. <u>Interservice Physician Assistant Program (IPAP)</u>. The IPAP is a joint service accredited college program that confers both a bachelor's degree during and a master's degree at the end of the program. It provides rigorous medical training to AD enlisted members resulting in highly skilled clinicians to serve in the Coast Guard as medical officers. The PM publishes specific information on the application requirements and selection process annually. Note: Enlisted IPAP students attend DCO School following the completion of the IPAP program. Note 2: IPAP is both Officer Accessions and Advanced Education. The Advanced Education program manages all students in accordance with Chapter 12 of this Manual.

5. <u>Reserve Officer Candidate Indoctrination (ROCI)</u>. ROCI is the initial course of instruction for applicants selected for the Selected Reserve Direct Commission (SRDC) and SELRES Direct Commission Physician Assistant (SELRES DCPA) programs. ROCI is three weeks in duration.

D. Civilian Orientation Program

The Civilian Orientation course is available via the Coast Guard's learning portal at https://elearning.uscg.mil/ . The purpose of the course is to provide all civilians employees an understanding regarding the Coast Guard's overall missions, culture, and internal processes. This course does not teach individual job requirements.

CHAPTER 7   ENLISTED RATING-ENTRY PERFORMANCE TRAINING – CLASS "A" SCHOOLS

A. General

1. <u>Enlisted Rating Entry Performance Training</u>. Enlisted Rating Entry Performance Training is the foundational training for all ratings. Each Class "A" School prepares enlisted E-2 & E-3 members to perform the technical duties of Third-Class Petty Officers in a specific rating. Exception: DV Class "A" School Course prepares E-4 & E-5 members to perform the technical duties of Second-Class Petty Officers in the DV rating. Class "A" Schools are an integral part of the Enlisted Rating Advancement Training System (ERATS). FORCECOM reserves the right to shorten the duration of an individual's attendance at a Class "A" School based on prior experience. More information on ERATS is available in Chapter 15 of this instruction.

2. <u>Applicability</u>. Unless indicated otherwise, this Chapter applies to Active Duty and Reserve members.

3. <u>Waivers</u>. Unless waived by the appropriate authority, personnel must meet all E-4 advancement requirements, per Reference (w) prior to advancement to E-4 or in the case of DV; personnel must meet all E-5 advancement requirements, per Reference (w) prior to advancement to E-5.

4. <u>Unsanctioned Requirements</u>. COs or OICs must not impose additional requirements on any member that would delay the member from placement on a Class "A" School list. The Rating Training Advisory Council (RTAC) for each rating determines the pre-requisite requirements for the A School. FORCECOM promulgates the pre-requisite requirements via ALCOAST. The pre-requisite requirements for all Ratings are compiled into the EPM-2 A School Assignments Rating Requirements Listing posted to the Coast Guard PSC website: <u>PSC-EPM - Non-Rates (sharepoint-mil.us)</u>.

B. Eligibility

1. <u>The general eligibility requirements are as follows</u>:

   a. Members must be eligible for transfer in accordance with Reference (o).

   b. Members must meet the obligated service requirement addressed in the Obligated Service section of this Chapter.

   c. Members must comply with weight standards in accordance with Reference (y).

   d. Prior to applying for Class "A" School, non-rated active duty members must serve four months at their first permanent duty station. Qualified members wishing to attend Class "A" School for a critical rating must request a waiver of the four-month time requirement unless a waiver for the critical rating has been promulgated for all members. COs or OICs cannot extend this four-month period unless the member fails

to meet the requirements of this section. Any failure must be documented in Administrative Remarks, Form CG-3307, along with those steps taken to meet the requirements. This requirement may be waived by FC-T based on service need and input from relevant Headquarters Program Managers and RFMCs.

e. Members must be eligible and recommended for advancement to attend Class "A" School. If a member receives an unsatisfactory conduct mark as a result of an NJP proceeding, after applying for a Class "A" School, the member's command must notify Commander, Coast Guard Personnel Service Center, PSC (epm-2) immediately. Generally, such notification will result in removal from the Class "A" School list. However, Commanding Officers and Officers in Charge may, at their discretion, request PSC (epm-2) waive this requirement. Commanding Officers and Officers in Charge should consider the severity of the offense before requesting a waiver. If the waiver is denied, the member must maintain a minimum of six months good conduct before re-applying.

f. Certain Class "A" Schools require members to have a security clearance. The command must mail Standard Form 86 Certification to the Security Center (SECCEN) before the student attends Class "A" School. The command must also provide the following acknowledgement on the Class "A" School application: "This command certifies that member is a U.S. Citizen and the NACLC security package was mailed to SECCEN on (date)." The member will remain in a security hold (SEC) status until the command certifies the package has been sent to SECCEN.

g. ASVAB and AFCT waivers are discussed in Paragraph G of this Chapter.

h. Disenrolled Class "A" School students are subject to reassignment in accordance with Reference (o). Qualified Members who receive a no fault disenrollment may request consideration from PSC (epm-2) to attend Class "A" School for a critical rating and waive the requirement to return to their previous unit or reassignment.

i. Members failing to report in accordance with Class "A" School orders are subject to disciplinary measures outlined in the Discipline and Conduct Manual, COMDTINST M1600.2 (series). Qualified members who receive a no-Fault disenrollment may request consideration to attend Class "A" School for a critical rating and waive the requirement to return to their previous unit or reassignment.

2. Medical Requirements. Members must meet the following medical requirements. Medical standards are outlined in Reference (z). Rating specific medical requirements are listed on the PSC EPM-2, Class "A" School Assignments Rating Requirements Listing posted to the Coast Guard PSC website: PSC-EPM - Non-Rates (sharepoint-mil.us).

a. Vision. For ratings that require normal color vision, commands must ensure that the member has been medically screened and must certify on the Class "A" School application that the member has been medically screened using the following statement: "This command certifies that this member has been medically screened on

(date) and has normal color perception." If this statement is not received, the member will be placed on Medical (MED) hold until the command can certify the candidate's vision.

b. Hearing. For ratings that require normal hearing, commands must ensure that the member has been medically screened and must certify on the Class "A" School application that the member has been medically screened using the following statement: "This command certifies that this member has been medically screened on (date) and has normal hearing." If this statement is not received, the member will be placed on Medical (MED) hold until the command can certify the candidate's hearing.

c. Pregnancy. Eligible pregnant members waiting on an active Class "A" School list will receive orders to attend Class "A" School provided they will not enter the third trimester of pregnancy prior to the scheduled graduation date. Pregnant members not meeting this criterion will be placed on MED hold.

C. Obligated Service

This Instruction is not intended to address obligated service requirements outlined in Reference (o) pertinent to follow on assignment after Class "A" School graduation. Service members must adhere to the following:

1. To execute orders to Class "A" School, the service member must have at least 24 months of service remaining on their enlistment upon graduation from Class "A" School. It is the responsibility of the member's Personnel and Admin Office to ensure the member meets the 24-month obligated service requirement prior to executing orders to Class "A" School.

2. Obligated service requirements for Class "A" School are calculated by adding 24 months to the course graduation date listed on the member's orders. Once in training, members must not incur additional obligated service if the course schedule changes, member is placed in remedial training or member is re-phased.

3. Members with insufficient time remaining on an existing enlistment contract must extend or reenlist under the provisions of Reference (o) prior to executing Class "A" School orders. Members who are not reenlistment eligible and cannot extend without a waiver from PSC-EPM, must submit an expedited request for consideration and obtain approval from PSC-EPM prior to executing Class "A" school orders.

4. Members who decline to obligate service or are denied a reenlistment waiver will have their orders cancelled and be removed from the Class "A" School's waiting list.

5. Members who execute Class "A" School orders and do not meet the obligated service requirement will have ten days following their arrival at Class "A" School to extend or reenlist under the provisions of Reference (o). Refusal to extend or reenlist to meet this obligated service requirement must result in an immediate Fault Disenrollment, and member must be subject to the policy outlined in Reference (o). Further information on Disenrollment is found in Chapter 2 of this Instruction.

6. Personnel disenrolled from the course of instruction due to a Fault disenrollment will be required to fulfill their remaining service obligation. Personnel disenrolled from the course of instruction due to a no-Fault disenrollment must route a request memo to Commander, Coast Guard Personnel Service Center (PSC) (epm-1) or (rpm-2) to have the obligated service requirement rescinded or reduced.

7. Upon graduation from Class "A" School, members assigned OCONUS may be required to obligate additional service per Reference (o).

D. Reserve Personnel

Most Selected Reserve (SELRES) members are recruited to a specific rating and receive the Class "A" School reservation upon enlistment. SELRES must attend a Class "A" School within 24 months of enlistment.

E. Application

Commander, Coast Guard Personnel Service Center (CG PSC (EPM-2)) manages and processes all Class "A" School applications for Active Duty members and (CG PSC (RPM-2)) does likewise for Reserve members.

F. Documentation

COs or OICs must document a member's removal from Class "A" School list using Administrative Remarks, Form CG-3307.

G. Aptitude Batteries

1. General. The Department of Defense Armed Forces Classification Test (AFCT) and Armed Services Vocational Aptitude Battery (ASVAB) tests are different versions of the same battery of tests. ASVAB tests are administered before a person enters the armed forces. AFCT tests are administered to in-service members. Service members must attain specific scores on two or more of the ten tests that make up the ASVAB or AFCT to qualify for various training and education programs within the Coast Guard. These individual test scores, in various combinations, are called composite scores. The composite score requirements for all Ratings are contained on the EPM-2 Class "A" School Assignments Rating Requirements Listing posted to the Coast Guard PSC website: PSC-EPM - Non-Rates (sharepoint-mil.us).

2. <u>Re-Testing</u>. FORCECOM Training Division (FC-T) is designated to oversee the policy aspects of AFCT re-testing in the Coast Guard. ETQC, via FC-T and ESO partnerships, is designated to oversee the procedural aspects of AFCT re-testing in the Coast Guard.

3. <u>Policy</u>. The AFCT must be administered to all in-service enlisted applicants to qualify for basic petty officer courses (Class "A" School) or advanced training when previous test scores are not available or not high enough to qualify the member for training.

4. <u>ASVAB</u>. If a member's ASVAB composite scores are below the threshold to qualify them for training or education programs, they may attempt to improve scores by taking the in-service AFCT or request a waiver. Waivers are not allowed for the AFQT score or for Officer Candidate School. Once a member is on active duty, there is no wait time before taking the initial AFCT. Additional information can be found on the ERATS portal page at: <u>Enlisted Rating Advancement Training System (ERATS) - Home (sharepoint-mil.us)</u>.

5. <u>Re-Testing Authority</u>. AFCT re-testing authority is granted only to Commanding Officers, Officers-in-Charge, military Education Services Officers (ESOs), or Test Control Officers (TCOs), who are in or above pay grade E-7 and civilian ESO or TCOs who are in or above pay grade GS-7. Personnel administering the re-test must be designated in writing as the unit's ESO or TCO or alternate ESO or TCO and must request special provisioning through ETQC to access the test.

   a. Units authorized as re-testing authority and who hold the AFCT tests must arrange administering tests at their units for service members under their command.

   b. Members must wait six months between re-taking the AFCT.

   c. Retest scores become the official score of record. Retest scores take precedence over previous scores even if the retest scores are lower than the previous scores.

6. <u>Waivers</u>. If the applicant is recommended for Class "A" School training but does not have the minimum qualifying ASVAB test scores, the CO or Officer-in-Charge (OIC) may waive up to five points on two or more ASVAB subtest scores, including the AR subtest score. COs or OICs cannot waive ASVAB scores to attend Class "C" Schools, nor can COs or OICs waive an AFCT score or a minimum subtest score.

   a. Applicants requiring a waiver beyond the scope of authority of the COs or OICs may submit a memorandum request to the relevant RFMC.

   b. The memorandum must contain a substantive command endorsement and address if the applicant has met the following requirements:

   (1) Completed required unit qualifications.

   (2) Attempted to raise any subtest scores by taking the AFCT.

   (3) Completed any prior work experience or training relevant to the chosen school.

CHAPTER 8 MANDATED TRAINING

A. General

Mandated Training (MT) is Formal Training specifically mandated for an explicit group of employees in accordance with federal, state, or local law (statute) or governing directive (policy) to include: mandates made via Executive Order, Congress, US Code (USC), Code of Federal Regulations (CFR), National Transportation Safety Board (NTSB) recommendation, Department of Homeland Security (DHS) Instruction, or Commandant Directive. MT aligns with an act or position through a specific competency. Performance analysis must guide the development of MT as deemed practical. FC-T, in coordination with PMs, evaluated MT on a regular cycle to determine effectiveness. Unit Commanders must provide adequate support and resources to the workforce to enable timely completion of MT. Formal Training classified as MT is subject to legal review. The Chief Learning Officer (FC-Cd) must provide written authorization prior to executing new MT that will impact more than half of the workforce or prior to establishing a recurring training requirement. The Learning Management System (LMS) delivers MT when deemed practical and appropriate by FC-T.

B. Program Manager (PM) Requirements

It is the responsibility of PMs to identify Coast Guard wide-requirements. This includes mandates made via Executive Order, Congress, USC, CFRs, NTSB recommendation, and DHS Instruction or Commandant Directive. The PM reviews the cross-programmatic, non-resident training requirements and recommends a course of action in coordination with FORCECOM Training Division (FC-T) for approval based upon the performance and training analysis. The PM must receive written authorization from the Chief Learning Officer (FC-T) prior to executing new MT that impacts more than half of the workforce or prior to establishing a recurring training requirement.

1. Justification. PM MUST provide FC-T justification documentation for performance requirements, for both requested training development, and documented data analysis.

2. Curriculum and Resources. PM is responsible for the development of a draft curriculum and must provide the resources including subject matter experts for the development process of approved training.

3. Cross-Programmatic Training. Policy may not mandate new cross-programmatic mandated training until approved by the FC-T.

4. Implementation. PM and FC-T approves MT curriculum, lesson plans, and eLearning courseware before promulgation.

C. Responsibilities

1. FORCECOM Training Division (FC-T) is the technical authority for MT and must:

    a. Manage the process for the development of all eLearning;

    b.   Provide consultation for solution selection and execution;

    c.   Ensure appropriate lifecycle management and evaluation of all eLearning solutions;

    d.   Collaborate with FC-B regarding use of standard electronic networks, portals, or systems used to deliver eLearning solutions; and

    e.   Provide support for documentation of all MT delivered by means other than eLearning.

2.   Program Managers must:

    a.   Acquire FC-T review and approval of all MT identified as a mandate from higher headquarters (e.g.: DHS HQ, OPM);

    b.   Collaborate with FC-T and FC-B during alignment, design, and development of eLearning; and

    c.   Provide a task list and additional documentation for selection of method of delivering and implementation of course or courseware.

D. Delivery Method

The principal method of delivery for MT is Self-paced eLearning (SPeL). All MT SPeL must have a test-out option. The Learning Management System (LMS), along with the Auxiliary LMS, delivers SPeL. Members of the workforce use their Common Access Card (CAC) to access the LMS, available online through the Training and Education page, or the learning portal at https://elearning.uscg.mil . Auxiliarists and all other employees that do not have a CAC, can access the Auxiliary LMS. Those requiring access to the Auxiliary LMS can find it at https://auxlearning.uscg.mil .

E. Compliance

Other federal agency websites, such as U.S. Navy and Department of Homeland Security, deliver MT. The UTO or UTPO must authorize non-Coast Guard course substitution. The Workforce must adhere to the following:

1. Current MT requirements are available on the Learning Portal at https://elearning.uscg.mil . The PM establishes additional requirements based on specific needs of the unit, platform, or mission area. FORCECOM (FC-T) approves any additional requirements.

2. It is the responsibility of the unit to ensure personnel complete the appropriate MT courseware.

3. The member is responsible for compliance with MT requirements. However, the command must support the member's efforts and provide an opportunity for the member

to meet the stated requirements. It is the responsibility of command and UTO or UTPO to coordinate unit MT.

4. The Learning Management System (LMS) captures most MT completions and then maps them to DA. Each unit reports all MT completions that are not captured in the LMS in the current task/certification tool database. This includes eLearning, resident, and unit training initiatives.

F. Evaluation

1. The Learning Management System (LMS) captures Level II evaluation data and reports it to DHS to meet mandated Officer of Personnel Management (OPM) Enterprise Human Resources Integration (EHRI) requirements.

2. Programs must resource the evaluation of interventions to determine their effectiveness by conducting a Level III evaluation in accordance with this Instruction.

3. Each course provides Level III evaluation data annually for the first two years and biannually thereafter at the discretion of FORCECOM (FC-T). The respective training manager and PM evaluate the data to determine the effectiveness of the MT.

G. Compensation for Online Mandated Training (MT) for Reservists

1. Coast Guard Reserve personnel must refer to Reference (x) for guidance related to accounting for time spent completing online MT requirements.

2. All MT courses have a combined time equal to a single Inactive Duty for Training (IDT) drill. Reservists receive the credit upon completion of a MT courses.

3. The LMS records distance learning activity or completion. The UTO, or UTPO, and learner can access the data via the LMS. The member must print the course certificate as proof of completion prior to the supervisors approving the IDT for payment.

4. Reservists are not "On Orders" when completing MT away from their unit.

CHAPTER 9 ADVANCED TRAINING

A. General

Advanced Training is for a specific billet, mission, or unit requirements. This Chapter identifies the policy for various types of Advanced Training. Chapter 4 of this Instruction discusses the Management of Formal Training.

1. Training Validation. The Program Manager (PM) determines performance requirements. Training may be necessary to support these requirements. Analysis of the performance and identification of training, and non-training interventions, determine the training requirements. Commanding Officers or Officers-in-Charge must discuss performance issues or training requirements with the respective PM. The PM must work with FORCECOM (FC-T) to further evaluate the training need.

2. Training Sources. When appropriate, the Coast Guard provides training organically. Other non-organic sources, such as other government agency(s) (OGA) and commercial contracts, can also provide training.

3. Obligated Service:

    a. Military personnel assigned to Advanced Training of greater than two weeks and less than 20 weeks must have one year or more of service remaining on their current enlistment or period of active service as of the completion date of the class. There is no minimum service requirement for personnel assigned to advanced training of 2 weeks or less.

    b. Military personnel assigned to advanced training of 20 or more weeks in duration must have either 2 or more years of service remaining on current enlistment or period of active service or 2 times the duration of the course, whichever is greater, as of the completion date of the class. Military personnel assigned to a Training Allowance Billet (TAB) for one year to facilitate completion of a series of advanced training courses must have 2 years of service remaining as of the completion date of the one year TAB.

    c. Enlisted personnel who do not meet the required minimum service remaining may qualify by agreeing to extend enlistment or reenlist under the provisions of Reference (w).

    d. Civilian Employees. Civilians must agree to continuous service (employment) for a period of three times the length of service for training that exceeds 80 hours in a single program as of the completion date of the class.

    e. FC-T considers requests for waivers of the minimum service requirement based on needs of the Service.

    f. The Training Center may disenroll any individual failing to maintain the academic

standards of performance, conduct, and appearance expected of all Coast Guard personnel. The obligated service applies to individuals disenrolled from any course of instruction and commences with the date of disenrollment or the termination of previous obligated service, whichever is later.

g. Reserve members not performing active duty should consult Reference (x) to determine the requirements and what inactive duty types they may use to complete online, and classroom mandated or non-Mandated Training. FC-T assigns reserve retirement points for Coast Guard organic Formal Training and Commandant (CG-5R) assigns reserve retirement points for non-Coast Guard delivered Formal Training.

B. Unit Funded Training

Unit funded training may include professional development courses based on individual needs or more mission specific training. Each unit's Commanding Officer or Officer-in-Charge identifies, coordinates, and approves unit funded training. Members must consult with their UTO or UTPO for specific guidance regarding unit funded training.

C. Class "C" School

By design, Class "C" School training opportunities provide advanced or specialized skills and knowledge to perform a task or group of tasks required by a specific billet or unit type; or requisite leadership and management knowledge, skills, and abilities in completing a leadership task. FC-T manages Class "C" Schools, and FC-B manages the PPA accounts that finance them. The Coast Guard, Department of Defense, OGAs, and vendors through commercial contracts (or some combination of each) deliver Class "C" School training.

1. Eligibility. The respective PM determines eligibility requirements by course and program type. Eligibility requirements for Class "C" Schools are available via the Class "C" School link on the Training and Education portal page: Training & Education - Home (sharepoint-mil.us). It is the Command's responsibility to ensure that members meet all pre-requisites and eligibility requirements before attending class and that service members' current position requires the training. Members must comply with Coast Guard weight and body fat standards prior to receiving orders to resident training in accordance with Reference (y).

2. Application. The UTO or UTPO must submit applications for Class "C" School training via Electronic Training Request (ETR) in Direct Access, as specified by the Program. The member and UTO are responsible for ensuring all pre-requisites are met and the member's current position requires the training. If a unit submits an ETR, it is expected that prerequisites are met, and that the unit is confident that the trainee will be available for training on the dates requested. Commanding Officers are responsible for prioritizing the attendance of unit members for training. Reserve members on ADOS for greater than 180 days and EAD orders must note their Active Duty status in the comment section of the ETR.

3. Quota Allocation:

   a. Slated Courses. Slated courses are those courses in which the program or course manager or their designee develops the list of selected students or class slate, to attend each course session. PMs receive training requests from field units, designate students for course sessions, create the slate of students for enrollment, and notify ETQC to enroll and issue orders to selected members. ETQC must accept slates from PMs or their designee only. ETQC determines and verifies TDY entitlements based on training location, Coast Guard policy and the Joint Travel Regulations (JTR) prior to issuing TDY orders to students. Students receive their orders via the airport panel in Direct Access. PMs remain responsible for authorizing all changes, substitutions, cancellations, and waivers to the "slate" of students. ETQC must enroll and issue orders in accordance with the JTR for service members or the Federal Travel Regulations (FTR) for civilians.

   b. Centrally Managed Courses. ETQC manages and controls quotas for centrally managed courses. Additionally, Programs do not slate centrally managed courses; however, Programs provide guidance regarding target audience, cancellations, or substitution policies. ETQC receives all training requests from field units, selects students, determines, and verifies TDY entitlements and issues orders. ETQC is responsible for authorizing all cancellations and substitutions as necessary. Program intervention is not normally required in the scheduling process for most training.

   c. Pre-arrival Training. Pre-arrival Training must be completed by members prior to arriving at their new unit. This training should be conducted on a TDY basis before members PCS but may be conducted in route and may involve a TAB assignment. ETQC works directly with Personnel Service Center (PSC) to issue orders for Pre-Arrival training. Members may work directly with ETQC for scheduling conflicts on a case-by-case basis. Members may request waivers through the appropriate PM. Programs remain responsible to approve or disapprove waivers for required or pre-arrival training.

4. Travel Orders. ETQC issues Direct Access training orders for Active duty, Reservists, Civilians, and Auxiliary members. Local units will manage the administration of travel orders to include initiation of the authorization, funds certification, and Authorizing Official (AO) approval. It is the unit's responsibility to frequently check for Class "C" School orders located in the airport panel in Direct Access. Reservists in a drilling status or on short term Active Duty (180 days or less) must receive no-cost orders from ETQC when the quota is approved. Reservists must request ADT-OTD orders via normal order request procedures.

5. Quota Cancellation. Commands have ten days from the orders issue date to cancel orders, request a substitution, or submit a waiver request for personnel in receipt of orders to a Class "C" School. Commands must send cancellation requests via message to the appropriate PM and ETQC within ten days of receiving orders. The PM must consider requests for cancellations for the respective course.

6. Quota Substitution. Units may request a substitution to a Class "C" School in extreme circumstances. The PM will consider substitution requests on a case-by-case basis with consideration of their policies and individual course policies. Units must send substitution requests via message to the appropriate PM and ETQC within ten days of receiving orders.

7. No Shows. If a member fails to execute orders to a Class "C" School and whose command did not request cancellation of orders at least 72 hours prior to the class convening, the command must mark them as a "no-show". Commands must send a message to ETQC and copy FORCECOM (FC-T) to cite reason(s) for non-attendance. Categories are listed in table 9.1.

No Show Category	Reason
Administrative	Member has not been notified by the Servicing Personnel Office (SPO) or Command of existence of orders (requires explanation of situation.)
Medical	Member is not fit for duty.
Conflicting TDY Commitment	Member had previous orders to other training or operational commitment.
Change in unit Operational Status (OPSTAT)	The unit's readiness required the member's presence at the unit
Family Emergency / other Hardship	Non-military obligations or situations required the member's absence from the Class "C" School

Table 9.1 No Show Categories

8. Course Cancellation Policy. A course session with only 50% of the quotas allocated by 45 days prior to the start date may be cancelled. Assigned quotas may be reallocated by the course's PM.

9. Course Evaluations. Graduates of Class "C" Schools and their supervisor must complete Level 3 surveys upon request. Training Centers launch Level 3 surveys approximately six-months after course completion. The Training System (TM and TRACEN) and the Program (CM or PM) review the survey data to identify any performance gaps and to determine changes needed to include adjustments to training.

10. Course Revisions. The PM, alongside the Training Manager (FC-T), is responsible for ensuring validity of a course content and curriculum. The TRACEN must perform a Triennial Review for each course within their purview. The resulting validated or updated Curriculum Outline is submitted to FC-T and PM for reauthorization. The PM must coordinate with their TM to resubmit Class "C" school curriculum outlines for non-Coast Guard organic training using curriculum outline shells on a three- year cycle to reauthorize each course.

CHAPTER 10   TRAINING ALLOWANCE BILLETS (TABS)

A. General

The General Detail (GD) is a necessary part of the military workforce and accounts for personnel who are not filling an assigned billet. One main purpose of the GD is to ensure assigned billets remain at 100% Personnel Allowance List (PAL) staffing in accordance with Reference (aa). The GD consists of two components: Training Allowance Billets (TABs), and Support Allowance Billets (SABs). SABs includes a subset called Temporary Emergent Requirement Billet (TERBS) which are explained in the PAL manual.

1. TABs are part of the GD and account for work-years of military members undergoing FORCECOM-directed training and education. A TAB is equivalent to one student year of training.

2. Members assigned to TABs incur a service obligation.

3. TABs as a whole and by category are subject to statutory limits and account for approximately 45% of the total General Detail (GD) allocation.

B. Categories

TABs categories and the average military training student loads by category are authorized by 14 U.S.C. 4903-4904. The four categories are:

1. Recruit and specialty training;

2. Flight training;

3. Professional training at civilian and military institutions; and

4. Officer acquisition.

C. TABs Management.

TABs are organized into the following Management Groups and cross walked to the categories in table 10.1:

1. Accessions (Enlisted and Officer).

2. Flight Training.

3. Specialty Training.

4. Advanced Education.

Categories	Description	Training Types	Management Groups
Recruit and Specialty Training	Includes recruit training, initial skills training, and other proficiency or developmental training accomplished before moving to the member's first permanent duty assignment. Also includes training need by an individual to function in a specific assigned billet.	Cape May Class "A" School	Accessions
		Class "C" School Pipelines Aviation Student Marine Industry	Specialty Training
Flight Training	Includes basic and advanced flight training for officers.	Basic Flight Adv Flight – Fixed Wing Adv Flight – Rotary Wing	Flight Training
Professional Training at Civilian and Military Institutions	All professional development courses and Advanced Education opportunities for the enlisted and officer corps.	Enlisted Undergraduate Officer Graduate Senior Executive Service Program Fellowships	Advanced Education
Officer Acquisition	Officer basic courses and all initial skill and proficiency training taken before travel to the service member's first permanent duty assignment. Applies to Enlisted members attending Officer Accession training or education programs.	CG Academy (CGA) CGA Preparation CSPI, PPE, etc. OCS, DCO, CWO IPAP (enlisted only) Law School (enlisted only)	Accessions

Table 10.1 TAB Crosswalk

CHAPTER 11   SPECIALIZED TRAINING AND OFFICER AVIATION TRAINING

A. Specialized Training

General. Specialized Training is a type of Formal Training that supports and furthers a specific specialty through advanced training 20 weeks or more in duration or extensive training pipelines where the duration of the training exceeds 139 days. Specialized training supports a specific billet, and members completing this training typically acquire competencies that are used in current and follow-on assignments. Members applying must meet requirements set forth by each Program.

1. Specialized Training General Requirements are as follows:

   a. Requirement, mandate, or statutory requirement (internal or external) for Formal Training.

   b. Specific billet or articulated class of follow-on assignment.

   c. The appropriate Personnel Service Command division determines the service obligation: epm or opm, and applicable PM. The minimum for Specialty Training requires the service member, as of the completion date of the training or as of the conclusion of the TAB, have at least two years of service remaining on current service obligation, a period of active service of two weeks service remaining for each week of training or two times the duration of the course, or whichever is greater.

   d. The duration of the cumulative training exceeds 139 days, or the school, course is more than 20 weeks in duration.

2. Long Class "C" Schools. Individual Class "C" schools which exceed 20 weeks in duration.

3. Advanced Training Pipelines. Extensive training which supports specific billets. Documented Formal training for a billet (i.e., per MTL) which accumulates to a training duration in excess of 139 days triggers a requirement to establish a training pipeline with TAB support. The program is responsible for initiating the request to establish an Advanced Training Pipeline. The request must address all of the Specialized Training General Requirements listed above as well as the following:

   a. The location(s) for the Training Pipeline TABs and the rating and pay grade of each.

   b. The list of training to comprise a specific pipeline.

   c. The general plan for the members to pursue during gaps between Advanced Training Courses while assigned to the Training Pipeline TAB.

   d. The plan handling the administrative actions for the individuals in the Pipeline TABs.

B. Aeronautical Engineering Officer Training

1. Description. The Coast Guard aeronautical engineering program is responsible for the critical long-term sustainment of aviation assets and ensuring airworthiness of these operational aircraft. To accomplish this, the Coast Guard developed a maintenance program based on Department of Defense's (DoD) practices and policies and the commercial industry model. Critical to the management of this maintenance program is the establishment of strong engineering leadership. The development of these leaders begins with the Aeronautical Engineering Officer Training (AEOT) program, a year-long intensive syllabus that begins with a stringent selective process and provides skills to individuals that allows them to manage engineering departments and lead program offices. Training consists of various DoD, Coast Guard and civilian resident courses, comprehensive structured-on-the-job (SOJT) training, and a capstone project. The member will receive the receive the Aeronautical Engineering Officer Specialty Code, CG-AEN10, and its associated follow-on assignments once the training syllabus components are complete. Additionally, selection to this career specialty allows these designated Aeronautical Engineering officers to compete for Aeronautical Engineering sponsored Advanced Education opportunities. Within a year of initial assignment into an Aviation Aircraft Maintenance Officer billet, all AVI or Chief Warrant Officers (CWO) must complete the CWO Aircraft Maintenance Officer syllabus.

2. Assignment. Individuals are assigned to an Air Station's Aviation Engineering Department after selection to the AEOT program. During this year-long training period, the trainee's primary duties will be the completion of the AEOT syllabus and any related assignment within the Aviation Engineering Department. With discretion, the CO may assign collateral duties; however, secondary collateral duty assignments of a non-engineering nature should remain minimal in order for the trainee to derive maximum benefit from the program. Trainees must perform all routine flying and watch standing duties applicable to the unit of assignment. In the last month of training, the commanding officer must send a letter to Commandant (CG-41) stating:

    a. The completion date of training;

    b. The overall capabilities of the student; and

    c. The aptitude of the selectee for designation and assignment as an aeronautical engineering officer.

3. Resident Training Courses. Several Class "C" School courses are required as part of the Aeronautical Engineering program. The Education and Training Quota Command (ETQC) will issue orders for the resident training courses during the 12-month training period. Training begins in September of each year.

4. Structured-on-the-Job Training (SOJT). This training is conducted at the members' air station using the Aeronautical Engineering Officer Qualification syllabus. SOJT provides skills to enable effective management of aeronautical engineering personnel, material, and funding. Selectees work closely with all facets of the Aviation Engineering Department.

5. Eligibility/Prerequisites. Candidates must be a designated Coast Guard Aviator and must display sustained high levels of performance, demonstrate highly effective leadership skills, and show strong potential for post graduate training. Candidates should also demonstrate outstanding aeronautical skills with documented potential of upgrading in their respective aircraft. Designation as an aircraft commander is not required for selection.

6. Application Procedures. ALCOAST message solicitation annually distributes detailed application procedures and processes. Candidates are selected by a CG PSC (opm) directed panel each year.

7. Obligated Service. Officers completing this course of instruction will incur three years of obligated service in addition to any previous obligated service, regardless of the time spent in training. Officers who disenroll prior to completion of this training will incur one month of obligated service for every month of training completed. Obligated service begins to accrue on the class convening date and becomes effective on the date of program completion or, disenrollment. Applicants for all curricula must agree not to request resignation during courses of instruction and must accept the period of obligated service.

C. Marine Safety Industry Training Program (Prevention)

1. General. The Marine Safety Industry Training Program is designed to provide officers with marine safety inspection experience and increased knowledge and understanding of Coast Guard regulated maritime industries, in accordance with 14 USC 314. PMs determine the length of the training. FORCECOM Training Division only manages TABS for individuals assigned to a program with a duration longer than 20 weeks. Reference (bb) outlines policy, procedures, and standards relevant to the program.

2. Eligibility. Primary selection emphasis is on officers in the grades of LTJG through LCDR.

3. Commencing Industry Training. Once the industry training student receives PCS orders, they must work with their new command and PM to identify prospective Industry Training sponsor(s) in the area of the new PCS unit or as determined by the appropriate authority.

4. Obligated Service. Students attending this program incur a debt of service. The obligation becomes effective on the date of transfer out of Industry Training or upon termination of previous obligated service, whichever is later. Members must serve three months for each month of Industry Training for the first 12 months, and one for one

thereafter. This period of obligated service begins to accrue on the class convening date and becomes effective on the date of graduation, program completion, disenrollment, or termination of previous obligated service, whichever is later. A member who dis-enrolls must obligate three months for every month or part thereof that the member was in Industry Training.

D. Mission Support Industry Training Program

1. General. This program provides officers within the mission support enterprise an opportunity to gain new perspectives and understanding, as well as exposure to emerging technologies, cyber security policies/procedures, predictive and reliability centered maintenance practices, project/program management best practices, and observation of executive leadership, recruitment, and retention practices from a corporate/industry perspective. Reference (cc) outlines policy, procedures, and standards relevant to the program.

2. Duration. This program involves assignments with industry for a period of 12 months.

3. Eligibility. Primary selection emphasis is on officers in the grades of LT through LCDR.

4. Commencing Industry Training. Industry training students in receipt of PCS orders, must work with their new command and PM to identify prospective Industry training sponsor(s) in the area of the new PCS unit or as determined by the appropriate authority.

5. Obligated Service. Students attending this program incur a debt of service. The obligation becomes effective on the date of transfer out of Industry Training or upon termination of previous obligated service, whichever is later. Members must serve three months for each month of Industry Training for the first 12 months, and one for one thereafter. This period of obligated service begins to accrue on the class convening date and becomes effective on the date of graduation, program completion, disenrollment, or termination of previous obligated service, whichever is later. A member who dis-enrolls must obligate three months for every month or part thereof that the member was in Industry Training.

E. Officer Aviation Training (Flight Training)

1. General. Flight training prepares officers for aviation duty. Training consists of preflight (ground and sea survival training) course work followed by primary and intermediate flight training in a basic flight training aircraft. Advanced flight training involves specialization in fixed-wing (multi-engine) aircraft or helicopters while continuing ground course work. Once designated a Coast Guard aviator upon completion of flight training, the officer receives follow-on transition training into Coast Guard aircraft.

2. Duration. Average period of training is 20-30 months.

3. Location. Basic flight training and advanced helicopter training are conducted at Naval Air Station (NAS) Pensacola, FL. Advanced multi-engine fixed-wing training is

conducted at NAS Corpus Christi, TX.

4. Eligibility. Upon receiving a commission, all Coast Guard officers on active duty, except Reserve Component Managers (RCM), are eligible for flight training within the following limitations:

    a. Applicant must not have reached age 31 prior to time of enrollment in flight training.

    b. Applicant must meet physical standards in accordance with Reference (dd).

    c. Applicant must pass US Navy and Marine Corp Aviation Tests.

5. Obligated Service:

    a. Flight training constitutes duty under instruction. Each officer who commences flight training must obligate additional service on active duty. Officers completing flight training incur a total of eight additional years of service from the date of completion of flight training or from date of completion of all other obligated service, whichever is later. By accepting flight training orders, the selected officer agrees to the obligated service requirements as stipulated in this Manual and any revisions thereof announced via ALCOAST. The selected officer must sign the appropriate obligated service statement prior to executing PCS orders to flight school.

    b. Academy graduates completing flight training have eight years of additional service over and above the initial Academy obligation. They must complete the initial obligation prior to the eight-year flight training obligation.

    c. Reserve and temporary officers incur an eight-year active duty obligation upon completion of flight training which they serve in addition to any applicable initial contractual active duty period. The eight-year flight training obligation will not begin until the end of the initial period of obligation.

    d. Officers who commence, but do not complete flight training incur one additional month of active duty for each month in which they participate in flight training.

CHAPTER 12   ADVANCED EDUCATION (MILITARY)

A. General

This Chapter establishes policy and responsibilities for managing Advanced Education. The Advanced Education Program aims to raise the level of individual military professionalism and technical competence so the Coast Guard's enlisted and officer corps can more effectively perform their required duties and responsibilities as well as provide developmental incentives for personnel with high ability, dedication, and capacity for professional growth to remain in the Coast Guard. FORCECOM partners with Coast Guard programs to continuously assess the strategic evolving needs to ensure appropriate educational opportunities are available. FORCECOM selects members for these opportunities who are high performers, dedicated to their studies and to meeting program administrative deadlines throughout their DUINS tour, and who are motivated to complete a full-payback tour so the Coast Guard can capture its return on investment. This Chapter does not cover the Coast Guard Tuition Assistance Program or Advanced Education for civilian employees.

B. Background

Advanced Education categories include undergraduate, graduate, fellowships, and senior service programs. The Coast Guard Advanced Education Program (AE) (undergraduate and graduate opportunities) is designed to qualify officer and enlisted personnel for specialty billets.

C. Roles and Responsibilities.

The following are the primary roles and responsibilities of those directly involved in the Advanced Education program.

1. Advanced Education Program Manager (AEPM) must:

    a. Serve as policy, guidance, and Advanced Education TAB owner;

    b. Provide senior level guidance;

    c. Act as a senior leadership conduit;

    d. Oversee the Program Administrator; and

    e. Act as an appellate during disputed situations.

2. Advanced Education Program Administrator (AEPA) must:

    a. Liaise with student managers;

    b. Facilitate the annual peer review group TAB allocation process;

c. Support fiscal management;

d. Oversee the Advanced Education Program; and

e. Develop and maintain Advanced Education policy.

3. Peer Review Group (PRG) must:

a. Consist of workforce management representation from DCMS, DCO, CG-8, FC, CGA, and 2 Command Master Chiefs;

b. Measure each program to the defined criteria set forth by the precept;

c. Allocate the allowable TABs;

d. Reallocate TABs that become vacant; and

e. Act as neutral council when programs request or when needs dictate.

4. The Student Manager (SM) must:

a. Be formally designated by their Program Chief as the Advanced Education Student Manager;

b. Act as direct representative from the sponsoring Program to the AE Program;

c. Oversee administrative actions of the Program and student;

d. Identify programmatic educational and training requirements;

e. Identify preferred schools for their program (all preferred schools must have a DoD MOU – Voluntary Education Partnership Memorandum of Understanding);

f. In partnership with OPM or EPM, select qualified members to attend an AE opportunity;

g. Ensure selected programs of study fall within the AE Assignment Year (AY) funding cap. The Student Cost Share Agreement will resolve any discrepancies between allocated funding and program of study costs;

h. Minimize the request for over-the-tuition cap waivers by following the guidance indicated in the annual funding letter;

i. Onboard selectees into the program;

j. Review curriculum and cost of students' educational institution choices;

k. Refer questions regarding scholarships to AEPA;

l. Maintain administrative control over students in program; and

m. Re-Integrate students upon program completion or termination or whichever occurs first.

5. <u>Students must</u>:

a. Apply to Advanced Education PM approved educational institution(s);

b. Gain acceptance to the educational institution and the specific degree program;

c. Complete necessary prerequisites and route documents to ensure adequate processing for enrollment, tuition payment, and PCS;

d. Act as Coast Guard liaison between the Coast Guard and the institution regarding their attendance, including the educational institution's Military Advocate, the Bursar's Office, and third party payments office;

e. Maintain Coast Guard military requirements and standards by complying with all COMDTINSTs while in DUINS, to include urinalysis, Physical Health Assessment (PHA), dental, and weigh-ins;

f. Monitor and comply with fiscal requirements;

g. Report all scholarships to the SM for guidance and adhere to the policy in this chapter paragraph E.7;

h. Carry a fulltime credit hour load, year-round, at the respective educational institution, in accordance with table 12.3;

i. Maintain academic proficiency throughout the program, in accordance with F4;

j. Complete program of study's requirements in the allotted time; and

k. Follow-up with the attended University and FINCEN prior to graduation to ensure all financial matters have been reconciled.

D. Policy

1. <u>Advanced Education (AE) Training Allowance Billet (TAB)</u>. FORCECOM (FC-CI) manages Advanced Education TABs. AE TABs are owned by FC-CI but loaned to programs as they are allocated. Chapter 10 of this manual provides general information on TABs. The paragraphs below provide detailed information concerning AE TABS:

a. <u>TAB Allocation</u>. Open TABs are allocated in conjunction with the assignment year process. The Peer Review Group (PRG) in accordance with the Advanced Education Precept, signed by FC-C., distributes AE TABs. The PRG is utilized in the TAB allocation process to ensure transparency and sustainability. The allocation process is facilitated by the AEPA as a non-voting member of the PRG.

b. <u>New Program Request</u>. New programs that wish to compete in the AE TAB allocation process must reach out to the AEPA prior to 01 September annually and must participate in the AE annual survey.

c. <u>TAB Maintenance</u>. Programs are to review academic programs yearly. If the academic program no longer aligns with organizational goals or the Program wishes to discontinue offering the opportunity, FC-CI will place the academic program in an inactive status.

d. <u>Deferments</u>. If a deferment is authorized by Programs, in consultation with opm or epm, the Program may select an alternate member to fill the allocated TAB in the year of the deferment. A future TAB will not be guaranteed to the program allowing the deferment. In the assignment year in which a program authorized deferment ends, the program must use one of that year's allocated TABs for the deferred member. If no TABs are allocated to the program for the assignment year, then the deferred member loses the Advanced Education opportunity. Deferred students are not authorized to take any action on any Advanced Education onboarding procedures, including application to schools, until after the message release and formal acceptance of their TAB in the academic year in which they will start.

2. <u>Obligated Service</u>.

a. Members attending Advanced Education opportunities, to include prestigious scholarships or fellowships as defined in paragraph G-2 must agree, in writing, to the obligated service commitment.

b. Members selected for Advanced Education opportunities must sign obligated service agreements prior to the execution of DUINs orders.

c. Obligated service begins to accrue on the commencement of the program, scholarship, fellowship, or grant unless otherwise noted in official correspondence or policy.

d. Obligated service becomes effective upon the completion of the program or termination of previous obligated service, whichever is later.

e. Unless otherwise noted in official correspondence or policy, students will incur an obligation of three months active duty for every one-month for the first 12 months then 1-for-1 for each month thereafter. Special instances of obligated service are addressed below in paragraph D-3b on scholarships and paragraph G-3 on the Olmsted Scholar Program.

f. Failure to meet the obligation may result in recoupment procedures in accordance with Reference (ee).

g. Students who complete their program must adhere to obligated service policies by entering a follow on (payback/utilization) tour that utilizes the knowledge and skills acquired through the Advanced Education program. Advanced Education program graduates who wish to separate or retire must complete the terms of their obligated service as well as their payback tour prior to separation from service.

h. Students who are non-selected for the next promotion while on DUINS orders must complete their Advanced Education program, any incurred obligated service, and their payback tour prior to separation from service.

3. Scholarships and Fellowships.

a. A scholarship awarded to a member selected for an Advanced Education academic program does not change the obligated service incurred, in accordance with paragraph D.6. of this Chapter. Members must follow the funding guidance with regards to the scholarship as listed in paragraph F.21 of the Chapter.

b. Members selected for a prestigious fellowship or scholarship, which results in an educational opportunity, must follow the funding policy listed in this Chapter paragraph F.21. Such members will incur obligated service of three months active duty for every one month of the fellowship, scholarship for the entire duration, in accordance with 10 USC 2603. Section G of this Chapter addresses additional information on prestigious fellowships or scholarships.

4. Administrative Functions. Once a TAB is occupied by a student (to include enlisted IPAP students), the sponsoring program must assume all administrative functions, not owned by the Servicing Personnel Office (SPO), including, but not limited to the following areas.

a. Participation. Members participating in the Advanced Education Program, as students or fellows, remain on Active Duty and are representatives of the Coast Guard.

b. Evaluations. Reference (u) for officers and Reference (w) for enlisted service members provide specifics regarding evaluations. Students must consult their student manager for routing procedures.

c. Leave. As long as students remain in the local commuting area, it is not necessary to take leave during short school breaks, (holidays, Spring Break, etc.). If students will be away from the local commuting area for more than 72 hours, the student must submit an absence request to the student manager through Direct Access.

d. Travel Card. Student Government Travel Card management resides with the sponsoring programs. Use of government travel credit card remains governed by References (ff) and (p).

e. Emergencies. The student must notify their student manager of any emergency (to include issues regarding dependents) that could affect the member's course of study. If a student is injured, they must follow Coast Guard medical notification procedures in accordance with Reference (gg).

f. Accountability. The program is responsible for individual student accountability. FORCECOM will query programs, for reporting purposes, if an accountability situation arises. AE students must maintain accurate information for themselves and dependents in the Coast Guard Personnel Accountability System (CGPAAS) in accordance with Reference (t).

g. Misconduct. Civil arrests and complaints filed against students must be reported immediately to the AEPM and may result in removal from the AE program and possible disciplinary action. Students (as Active Duty members), are subject to Coast Guard regulations and the Uniform Code of Military Justice (UCMJ). Commander, Coast Guard Personnel Support Command expects all students to maintain high standards of performance.

h. Appeals. All student appeals must go through their respective AESM. The AEPA has initial decision authority over routine programmatic matters. An AESM may appeal a decision to the AEPM. Further appeals require a written request routed through the program directorate to FC-CI. If the program does not agree with FC-CI's decision, final determination authority resides with the FORCECOM Commander (FC-C).

i. Judicial and Non-Judicial Punishment. Programs must allow members' ADCON chain of command to handle UCMJ and NJP violations. AEPL must notify the AEPM of any situation or investigation that could result in a violation of law or the UCMJ.

E. Funding

All tuition and approved fees are funded utilizing current FORCECOM payment procedures. All other pay and entitlements are funded through traditional Coast Guard funding streams.

1. Cost Share Agreement (CSA). The CSA identifies the portion of a students' educational costs that are the government's obligation. The specific Advanced Education opportunity will not exceed the agreed upon amount, which is the amount of the total obligation listed on the CSA. Students are then considered fully funded or partially funded in accordance with their CSA. Students are required to disclose on the CSA, regardless of source or timing, any financial assistance offered to pay for any tuition or non-tuition expenses associated with the educational opportunity.

2. Cost-Share Adjustments for inflation reasons are authorized for the final semester of attendance, if needed, but will not exceed the cap.

3. <u>In-State Tuition</u>. Pursuant of 20 U.S.C § 1015d of the Higher Education Opportunity Act, public institutions must offer and/or accept in-state tuition (where applicable). As such, students attending a public institution must pursue in-state tuition. If in-state tuition is not granted, the student must inform the AESM and they must consider all options, including changing institutions.

4. <u>Dual Degrees</u>. Unless otherwise specified and approved, the government must pay for ONE academic program of study. AESM and AEPA must approve all requests for second degrees. The second degree cannot interfere with the primary course of study or lead to additional time requirements. The fiscal burden of a second degree is on the member.

5. <u>Tuition Assistance (TA)</u>. TA must not to be used concurrently with an Advanced Education program. There is no conflict of interest or any repercussion for utilizing TA to fund the first part of a program of study and finishing it through DUINS on an Advanced Education TAB.

6. <u>Reduced Education Expense Agreements</u>. Students may not negotiate or enter into agreement(s) with an institution that confer a benefit (contractual or fiscal) to any individual or give the appearance the agreement is likely to affect the integrity of the student's official duties or that a reasonable person would not question the impartiality of the student(s) or program. Programs may negotiate reduced educational expense agreements, but the AEPA must receive a legal review of any such agreements prior to approval.

7. <u>Financial Aid</u>. Students who are fully funded must not complete a FAFSA nor apply for any need-based grants. Students who are partially funded may complete a FAFSA or apply for need-based grants for the sole purpose of obtaining a student loan to fund their cost-share. Partially funded students receiving financial aid must not accept funding that exceeds their cost-share for tuition and fees as students are not authorized to profit from an Advanced Education opportunity. Students may inquire, pursue, or utilize additional funding sources, through an approved application process offered to all students or to a designated group to which the member belongs (e.g., military) including scholarships or individual entitlement(s) (e.g., G.I. Bill).

8. <u>Fellowships, Scholarships, and Grants</u>. Students in Advanced Education academic programs awarded or offered fellowships, scholarships, or grants to pay for tuition or non-tuition related education expenses are required to update their CSA and immediately contact their student manager for guidance. Students must receive approval from the AEPM before the student may accept or use any fellowship, scholarship, or grant funds. If applicable, students authorized to accept a fellowship, scholarship, or grant, must request the funds be paid directly to the school. Table 12.1 outlines the order of precedence for funds distribution. Only when expenses related to the higher order of precedence are fully paid, will excess funds be applied to the lower order of precedence.

To the extent authorized by a particular fellowship, scholarship, or grant, students may only apply funds to non-tuition expenses that are identified on the CSA. The student can contact FC-CI for a list of non-funded, non-tuition approved school expenses. The student must ensure all funds more than tuition or approved non-tuition expenses are returned to the awarding entity. Students may never accept funds to offset housing or subsistence expenses.

Authorized Scope of Use for Funds	Fully Funded by Coast Guard	Partially Funded (cost-share) by Coast Guard	
		Coast Guard portion	Student portion
Tuition expenses only:	1st Reduce Coast Guard's tuition bill.	2nd Reduce Coast Guard portion of tuition bill.	1st Reduce student portion of tuition bill.
Tuition or nontuition expenses:	1st Reduce Coast Guard's tuition bill. 2nd reduce student's non-funded, non-tuition approved school expenses.	2nd Reduce Coast Guard's portion of tuition bill.	1st Reduce student's portion of tuition bill. 3rd Reduce student's non-funded, non-tuition approved school expenses.

Table 12.1 Order of Precedence for Application of Funds

F. Academic Practices

Guidance for programs and members in a course of study.

1. <u>School Selections/Preferred Schools</u>. Programs must identify "Preferred" schools that align with programmatic need(s). However, including cost considerations, educational institutions must be regionally accredited and be a signatory to the Department of Defense Voluntary Education Partnership MOU. Online programs must be fully synchronous or a hybrid program with synchronous elements. Per finance statutes, FC-CI does not have authorization to cover TDY travel for required residencies in hybrid programs. The sponsoring program office must assume those costs.

2. <u>Degree Plan Proposal (DPP)</u>. All students must submit a DPP and receive approval from the AESM for each proposal prior to applying to schools. The AEPA approves the DPP for the school selected for attendance. The AESM must review the DPP periodically (preferably during funding requests) to ensure the student is attending and pursuing

approved courses that align with the program's expectations. Courses listed on the DPP must match student's invoices prior to submission for payment. Students must obtain authorization from AESM prior to adding, dropping, or withdrawing from classes, or for any other deviation from DPP. AESM must coordinate with AEPA for actions that impact fiscal obligations in advance. Once the AEPA approves a DPP, students are not authorized to switch degrees (e.g., change from Master of Science in Engineering to Master of Engineering in Electrical Engineering).

3. Credit Hours. All students must be full-time as described using the standards in table 12.2 unless the institution dictates otherwise:

Credit Structure	Term	Master's Program	Bachelor's Program
Semester Hours (15-week terms)	Fall/Winter/Spring	9 credit minimum	12 credit minimum
	Summer	6 credit minimum	8 credit minimum
Trimester Hours (12-week terms)	Fall/Winter/Spring	8 credit minimum	10 credit minimum
	Summer	6 credit minimum	8 credit minimum
Quarter Hours (10-week terms)	Fall/Winter/Spring/Summer	6 credit minimum	8 credit minimum
Other	Mini-Session or Intersession	3 credit minimum	4 credit minimum

Table 12.2 Required Credit Hour Loads

4. Academic Proficiency. Academic or proficiency is defined as C or better for undergraduate program, and B or better for a graduate program. Failure of two classes or repeated withdrawals/incompletes during the program must result in removal. Failure of the same class a second time must result in removal. Students receiving "incomplete" for a class must convert the Class to a passing grade in the following term (or sooner). The AESM must notify the AEPA to discuss accountability options including student removal. Members are subject to recoupment procedures and/or obligated service if removed from an academic program, Reference (r). Members are subject to recoupment procedures and/or obligated service if removed from an academic program, Reference (r).

5. Challenge Exam. Students may have the option of taking a Challenge Exam to test out of a class in lieu of attendance. If the student passes the challenge exam, they must receive a reimbursement for Class tuition and fees. This applies only if the program requires the course for degree completion and the course is located on the approved degree plan proposal.

6. Remedial Hours. Reimbursement is not valid for any remedial course hours. Courses must count toward full-time status and be for a grade and credit contributing towards the completion of the degree.

7. Cancellations. The student must notify the AESM for any cancellation from the Advanced Education Program. The student manager must notify the AEPA.

FORCECOM can authorize the program to select an alternate to attend the program if entry requirements can be met for the same Assignment Year and fiscal requirements can be met for the Fiscal Year that the TAB was initiated.

8. Withdrawals. If a member withdraws from a program of study the AEPA must pursue recoupment in accordance with Reference (r) and ensure the member adheres to the obligated service outlined in this section.

9. Transcripts & Diplomas. All students must complete the program of study. Students must follow the procedures outlined on the ETQC portal to ensure degree entry into DA and the member's EI-PDR. Each student must ensure that ETQC enters the degree within 60 days of completion of the AE program via an official transcript of their academic record documenting the awarded degree. Students may need to supply an additional copy to AESM to have these documents evaluated in order to receive competency credit.

10. Thesis & Dissertation Procedures. Some academic programs require a thesis for degree completion. Students must coordinate and receive approval for topics with the school and their AESMs. The Coast Guard does not assign topics, but some Programs may have projects that can be considered for a thesis. It may be appropriate to substitute coursework for a thesis, depending on the accepted standards of the institution. Contact your program for additional thesis guidance. AEPA requires one copy of all completed thesis or dissertations. They will make additional distribution as appropriate. If there are requests for publishing through external entities the student must route them through AESM and AEPA to the Public Affairs office.

11. Study Abroad/International Courses. FC will not fund a foreign program of study without upfront, written approval from FC-CI. Generally, requests to transfer to and/or attend a full-time program abroad are denied (with the exception of the Olmsted Fellowship or Fulbright/other prestigious scholarship program). Individual classes and "semesters abroad" require written approval through the FC overseas studies request. FC will only approve credits given towards a graduation requirement. If approved, FC will not fund travel and per diem but may pay tuition, up to the resident INCONUS rate.

12. Research Fellowships and Teaching Assistantships. Approved educational institutions do not normally award research fellowships or teaching assistantships. However, if the student and the institution decide it would be beneficial for the student to participate in a fellowship or assistantship, the student must route a request for authorization to participate through AESM and AEPA to FC-Ccs. The student must first seek reduction in tuition rather than compensation. The institution may provide nominal compensation for fellowship or assistantship if tuition reduction is not an option. However, compensation must align with the institution's practices and procedures for other students of similar accomplishment in that department or field.

13. Internships. FC-C authorizes students to participate in an unpaid internship if required by the institution and receiving academic credit for a degree. The student must integrate the unpaid internship experience into the DPP. FC-C must not authorize paid internships that result in the receipt of credits.

G. Additional Educational Opportunities

1. Senior Executive Fellowship Program (SEFP). The term SEFP, historically referred to as Senior Service Schools (SSS), describes the Coast Guard's professional education programs available for O-5 and O-6 personnel. SEFP provides leadership opportunities not obtainable within our service. Commandant (CG-0923) manages SEFP, but FORCECOM owns the TABs and funding. Commandant (CG-0923) allocates SEFP TABs annually and conducts a program review with FORCEOM every three years.

2. Prestigious Fellowships and Scholarships. Coast Guard Academy cadets and Coast Guard officers and enlisted personnel may compete for fellowships and scholarships administered by non-profit foundations or government agencies, providing funding for research and/or graduate degrees. Fellowships or scholarships, acquired from a private source: corporation, fund, foundation, or educational institution may result in an increased obligated service time in accordance with 10 USC 2603. Programs interested in soliciting for these or any other educational or fellowship opportunities must contact the AEPA prior to posting a solicitation message due to potential TAB limitations. These fellowships include, but are not limited to:

    a. The Rhodes and Marshall Scholarships.

    b. The Hertz Fellowship and the National Science Foundation Graduate Research Fellowship for doctoral study in science and engineering.

    c. The Fulbright US Scholar Program.

    d. The Truman Scholarship Program.

    e. The Olmsted Scholar Program.

        Coast Guard Academy cadets must follow Provost Guidance with regard to application and onboarding to these programs. Coast Guard commissioned officers and/or enlisted members must follow FORCECOM Guidance with regard to application and onboarding to these programs.

3. Olmsted Scholar Program (OSP). The Olmsted Foundation sponsors this scholarship opportunity for junior officers of the U.S. Armed Forces with the intent to develop future senior officers who have a global perspective and the preparation to face the ever-increasing challenges and complexities of today's international environment. This unique program will result in earning a Master of Liberal Arts degree and fluency in a foreign language. The following is the specific information regarding the Olmsted Scholar:

    a. OSP is authorized in accordance with 10 USC 2603, 14 USC 504(a)(7) and Executive Order 11079.

    b. Provides an opportunity for officers to achieve proficiency in a foreign language, earn

a master's degree in liberal arts, and immerse themselves in a foreign culture. Provides a broad educational experience and shape future leaders; consistent with General Olmsted's firm conviction that our nation's "greatest leaders must be educated broadly".

c. The duration of OSP is 2-3 years in length, not to exceed 36 months. This includes language training for up to 1 year, followed by civilian graduate-level studies at a foreign university for a period of up to two years.

d. Nominations for OSP are subject to the availability of Coast Guard resources. DCO-I nominates 3-5 Coast Guard candidates using the Coast Guard Advanced Education process each year. The Olmsted Foundation makes the final annual selection of a Coast Guard Olmsted Scholar based on Coast Guard nominations submitted.

e. In order to be eligible for the Olmsted Scholar Program, interested Coast Guard members must:

   (1) Be an active duty officer demonstrating strong professional performance and the potential to assume future leadership positions at the highest levels of the organization.

   (2) Have at least three years of commissioned service, but no more than eleven years of total active federal service as of 1 April of the year of selection as a Scholar. Note: Total active federal service includes any enlisted time served on active duty in the Armed Forces and any extended active duty served under Reserve or National Guard auspices.

   (3) Demonstrate scholastic achievement.

   (4) Articulate a strong desire to study at a foreign university.

   (5) Demonstrate the aptitude to learn a foreign language.

   (6) Receive approval of their current command and PSC (opm).

   (7) Demonstrate a commitment to the Foundation's goals during the personal interview.

f. Officers submit applications in response to the Advanced Education solicitation and in accordance with annual guidance.

g. Deferment requests are not allowed. Members have the option to reapply when their tour is complete.

h. Selectees must follow the Duty Under Instruction policy for evaluations outlined in accordance with Reference (f).

i. Students attending OSP incur a debt of service. Obligated service becomes effective on the date of return from the OSP location or upon the termination of previous obligated service, whichever is later. Applicants must agree not to request resignation during OSP and must accept the period of obligated service. Members must serve three months for each month of OSP for the entire duration of the scholarship, and one for one for each month of the language-training year. This period of obligated service is in addition to any other obligated service that is previously incurred. Obligated service begins to accrue on the commencement of language training and becomes effective on the date of program completion, disenrollment, or the termination of previous obligated service, whichever is later. A member who dis-enrolls must obligate three months for every month or part thereof that the member was in OSP or the preparatory language training. By accepting the OSP scholarship, the selected officer agrees to the obligated service requirements as stipulated in this Manual and any revisions thereof announced via ALCOAST that are released prior to entering into the obligated service statement. The selected officer must sign the appropriate obligated service statement prior to executing PCS orders to language training.

j. Roles and responsibilities specific to OSP within the Advanced Education Program are additive to the Roles and Responsibilities as outlined in paragraph C of this Chapter and listed in table 12.3.

Entity	Role	Responsibilities
International Affairs (DCO-I)	OSP Program Sponsor	• Identify countries of critical interest to the Coast Guard • Fund all Service borne costs to include language-training costs. • Ensure Coast Guard OSP Scholars complete foreign language training; enroll in foreign university graduate level studies; and complete Olmsted Foundation report requirements. • Ensure Coast Guard Olmsted Scholars attend required pre-deployment training.
FORCECOM	FC-T - OGA Training Liaison	• Provide DCO-I with current language training availability and potential costs.
	FC-CI	• Perform normal Advanced Education program management and administration functions concerning OSP.
Coast Guard Olmsted Scholar	Program Participant	• Agree in writing not to request resignation during OSP. • Agree in writing to the required service obligation. • Complete the language training required for the country selected. • Abide by the dress code established by the Olmsted Scholar Program during the in-country OSP years. • Achieve a graduate level degree or certificate during OSP. • Complete the required written reports for the Olmsted Foundation.

Table 12.3 OSP specific roles and responsibilities

CHAPTER 13 VOLUNTARY EDUCATION

A. General

This Chapter provides an overview of the Voluntary Education (VolED) program. The purpose of this program is to support the Coast Guard's workforce in the pursuit of personal educational goals on a voluntary education basis. FORCECOM provides VolED's programmatic direction; whereas the Education and Training Quota Management Command (ETQC) executes the VolED program, and Education Services Officers (ESOs) administer the VolED program at each unit. Expansion of roles and responsibilities can be found under paragraph E of this Chapter. Processes and procedures as well as many resources can be found on the ETQC VolED portal page Education & Training Quota Management Command (sharepoint-mil.us).

B. Significance

Post-secondary education significantly equips the Coast Guard's workforce with the knowledge, skills, and abilities (KSAs) that not only enhances current work performance but supports the workforce beyond their Coast Guard careers. The more knowledge in one's arsenal, the greater the individual can help the Coast Guard compete as it transitions into a more agile service. Recruits consistently cite educational opportunities as a main reason for enlistment, and educational benefits remain a constant in those variables which contribute to warding off attrition of all sectors of the workforce. Finally, VolED has an integral role in preparing Coast Guard workforce in leadership, technical acumen, and critical decision-making abilities to react to unforeseen scenarios and future operational challenges in an ever-evolving world.

C. Mission

From a functional perspective, the Coast Guard's Voluntary Education Program champions policies, practices, and partnerships that promote high quality postsecondary educational opportunities for the Coast Guard's workforce. It strategically focuses on three areas in order to enhance voluntary educational experiences and drive student success by providing navigable pathways forward. These three areas of focus are as follows:

1. Increase access to high quality educational opportunities,

2. Provide navigable pathways forward resulting in student success.

3. Cultivate of culture of organizational support and effectiveness.

Paragraph D of this Chapter discusses these strategic focus areas that support the VolED program in greater detail.

D. Focus

1. Access. Key core components to ensure access parity to VolED educational

opportunities are:

a. Education Services Officers (ESOs) are the professionals who administer VolED and oversees unit learning center operations;

b. Unit Learning Centers are hubs which consolidates computers, classrooms, test prep, textbooks, the Internet, tutoring, and academic advising from both ESOs and visiting colleges and university representatives;

c. Funding is the dedicated money for tuition assistance, ESO professional development and travel, and learning center support; and

d. Vetted academic institutions provide affordable high-quality learning content and meet compliance criteria specified for all DoD Memorandum of Understanding (MOU) schools.

In order to ensure access parity, all units must appoint an education services officer and an alternate ESO, in writing, per the template provided by ETQC on the ETQC VolED portal. All ESOs will have ESO orientation training in order to familiarize themselves with the roles and responsibilities inherent to ESO work outlined in this Chapter and detailed on the ETQC VolED portal. All units must provide a space dedicated to learning center activities (e.g., classes; college representative visits; tutoring), and access to computers for academic research and other homework, as well as testing. Learning Center funding resides with DOL in the Budget Model and is distributed to the Bases. Each FT ESO should have an available allotment and ESOs should consult local comptroller for funding. Only DoD MOU networked academic institutions qualify for Tuition Assistance (TA) program funding. Tuition Assistance funding must be dedicated to Voluntary Education pursuits (e.g., degrees and academic certificates). Qualifying DoD MOU academic institutions can be found here: Participating Institutions (dodmou.com).

2. <u>Success through Navigable Pathways</u>. When students are adequately prepared and supported, they achieve readiness and success. The right pathway can support assessment of readiness and foster college preparation. Fulltime Education Services Officers, who are well versed in an array of educational tools (e.g., Kuder Journey, Joint Service Transcript (JST)) and pathways forward (e.g., College Level Examination Program (CLEPs), DANTES Subject Standardized Tests (DSSTs)), can advise and assist students in ensuring their academic goals align with their interest. They can also help ensure a student's academic load is manageable. Also, within this realm, units/ESOs should ensure continued student support through access to tutoring, academic counseling, assisting with tuition assistance requests and other funding options. Application procedures for Tuition assistance, rules, procedures, etc., can be found on the ETQC VolED portal. Other funding options are also located there.

3. <u>Conducive Organization Climate</u>. The education community requires effective and consistent messaging that underpins the importance of the VolED program. Coast Guard leadership should encourage collaborations and the leveraging of joint work. In this vein,

assessment, and evaluation of TA usage, DANTES usage, ACE usage, etc. is necessary. Meaningful research and data analyses will help signify the impact of the program locally, and help units determine if they are meeting the Commandant's intent. Recommended data and example dash boards are available on the ETQC VolED portal.

E. Roles and Responsibilities

In addition to the broader roles and responsibilities listed in Chapter 1 of this instruction this section provides greater detail on the roles and responsibilities involved in the VolED program.

1. FORCECOM will:

   a. Act as resource sponsor for Coast Guard VolED programs;

   b. Develop, coordinate, and promulgate the Coast Guard-wide policy for Voluntary Education programs;

   c. Represent Coast Guard Voluntary Education interest throughout the Coast Guard, Department of Homeland Security, and with the other armed services;

   d. Represent the Coast Guard and maintain liaison with appropriate federal and state agencies, private sector organizations, Department of Education (DoE), American Council on Education (ACE), and similar educational associations whose policies affect voluntary education; and

   e. Serve as the Coast Guard's representative with the Defense Activity for Non-Traditional Education Support (DANTES) and provide a staff member to serve on the DANTES Working Group.

2. The Education and Training Quota Management Command (ETQC) must:

   a. Execute the policy and prescribed procedures for the Coast Guard Voluntary Education Program;

   b. Provide Voluntary Education Program procedures on ETQC's website;

   c. Provide direct liaison with ACE, DANTES, and other institutions to execute services;

   d. Adjudicate (approve or disapprove) Tuition Assistance, Voluntary Education Services applications, refund or debt collections, and audit or waiver requests;

   e. Serves as central validation point for degree reporting and completion data entered into service members' official record;

   f. Maintain contact with educational institutions with regards to troubleshooting; and

g. Makes recommendations for new programs.

3. <u>Commanding Officers</u>. Cutter Commanding Officers are to ensure an MOU has been completed prior to embarking with an instructor through the AFLOAT/Professor Underway program in accordance with the procedures on the ETQC VolED portal page. Additionally, the Commanding Officer must notify the chain of command of the presence of a civilian instructor embarked. Likewise, Base Commanding Officers will ensure a MOU is completed for on-base classes and legally reviewed.

4. <u>Education Services Officers (ESOs)</u> are either full-time 1740 series or collateral duty positions. Full-time ESOs are sometimes Regional Education Services Officers (RESO), and as such, have an amplified role in collaborating with others within a specified region to assist them in accomplishing these roles/responsibilities. The responsibilities listed below apply to both full-time and collateral duty positions unless annotated otherwise:

   a. Oversee Learning Center operations and administer unit Voluntary Education Programs in accordance with the ESO SOP located on the ETQC VolED SharePoint page: <u>Education & Training Quota Management Command (sharepoint-mil.us)</u>.

   b. Ensure processes and procedures are followed for the Afloat/Professor Underway Program as provided on the ETQC VolED Portal, and on-base classes per the governing MOU.

   c. Administer or provide access to tests including the Armed Forces Classification Test (AFCT) and the Defense language tests (DLAB; DLPT). A more comprehensive list of tests administered by ESOs are listed on the ETQC VolED portal.

   d. Counsel unit personnel who share interest in pursuing higher education or other non-traditional education programs or vocational opportunities (Full-time ESO only). For a more extensive overview of ESO roles, refer to the ESO portal and ESO toolkit.

   e. Assist, mentor, and provide guidance to Collateral Duty ESOs in their respective Area of Responsibility (AOR). (Full-time ESOs only).

F. **Academic Program Descriptions and Educational Resources**

1. <u>Tuition Assistance</u>. The Coast Guard tuition assistance program assists Coast Guard personnel in broadening academic or technical backgrounds by providing funding for off-duty independent education. ALCOASTs outlines the specific tuition assistance policy and guidelines that are updated annually. Please refer to the current ALCOAST on the ETQC portal and the VolED portal page.

2. <u>AFLOAT/Professor Underway</u>. The Afloat Voluntary Education Program provides the opportunity for cutters to embark an instructor to support college courses. This program supports the personal and professional growth of Coast Guard members onboard a seagoing cutter. Unique challenges are presented when a Coast Guard Cutter embarks a civilian instructor. To alleviate potential issues, the command and the academic institution

must complete a MOU. A template MOU is available from ETQC's VolED portal page at ETQC - VolED Service Page (sharepoint-mil.us). Embarked instructor must be a citizen of the U.S. The Commanding Officer must notify the chain of command of the presence of a civilian instructor embarked.

3. Language Training. There are several online language training programs available to Coast Guard members. Below are a few options:

   a. Mango. Mango is available free to Navy, Marine Corp, and the Coast Guard via the Navy MWR Digital Library. https://www.navymwrdigitallibrary.org/login .

   b. Joint Language University (JLU). JLU is a U.S. government-sponsored language training portal that allows students to acquire, maintain, enhance and/or refresh language skills. The repository offers more than 10,000 catalog items, including targeted language training, assessment objects and area and culture training.

   c. Defense Language Institute Foreign Language Center (DLIFLC). DLIFLC is DoD's premier school for culturally based foreign language education and training. DLIFLC provides extensive online materials tailored for students at all levels of proficiency or performance and available to military service members.

G. Academic institutions and support agencies

1. American Council on Education (ACE). ACE is the major coordinating body for all the nation's higher education institutions. ACE reviews and analyzes Coast Guard resident courses, non-resident courses, and job experience and recommends college credit for these courses and experiences. The ACE evaluation allows military members to use the credits toward a college degree. Acceptance of ACE credit is at the discretion of and varies with each academic institution.

   The Registrar at ETQC is the ACE Service Program Manager (SPM) and serves as the liaison for submitting requests to ACE to review and evaluate Coast Guard courses, rates, designations, and occupations. The SPM requests input from course Stakeholders for submission to ACE's master schedule. Once ACE finalizes the master schedule, the SPM will distribute it to course stakeholders. For ACE to evaluate a course, the ACE Point of Contact (POC) at the Training Center (TRACEN)or schoolhouse must submit the approved curriculum outline, Program of Instruction, and other required documentation to the SPM via the ACE Military Training and Evaluation Portal (MTEP) for approval and coordination with ACE. The ACE POC should refer to the ETQC ACE Review Management Board available on MS Teams for additional information on how to request a review for new and revised courses, and courses approaching expiration.

2. Defense Activity for Non-Traditional Education Support (DANTES). The Defense Activity for Non-Traditional Education Support (DANTES) supports off-duty, voluntary education programs of the Department of Defense and the Coast Guard and conducts special projects and development activities in support of education-related functions. DANTES provides:

a. Examination Programs (such as CLEP, DSST, and graduate admissions tests);

b. Provides access to programs that prepare for college;

c. ESO Counselor Support;

d. Reference Materials; and

e. DANTES Information Bulletin.

DANTES student resources and tools are available through their website: https://www.dantes.doded.mil/EducationPrograms/index.html .

3. Joint Service Transcript (JST). The Joint Services Transcript (JST) is available to any person who has completed Coast Guard training. The JST documents military service member data, military course completions, military occupations, college level test scores (CLEP, DSST), and college courses funded by military tuition assistance (TA). The JST is available to Coast Guard active duty members, reserve members, civilians, spouses of active duty members, separated/retired members, and Auxiliary members and widely accepted by colleges and universities throughout the U.S. at their discretion. Additional JST guidance, to include transcript and correction requests, can be found on Home page (doded.mil).

4. Naval Community College (NCC). The U.S. Naval Community College (USNCC) supports enlisted Coast Guard members in achieving professional certificates and associate degrees that will enhance operational readiness and improve warfighting capabilities, while putting Sailors on a path to lifelong learning. NCC works with active duty enlisted Coast Guard members, as well as Coast Guard Reservists, to apply credits earned from military training and prior education toward their associate degree. The USNCC provides a five-course Naval Studies Certificate that counts as 15 of the 60 credits required for associate degrees. The USNCC program is separate from tuition assistance and voluntary education programs. Coast Guard NCC students can take NCC and VolED classes simultaneously to propel a degree to completion quicker. Students can explore NCC offerings and apply to NCC directly on their website: https://www.usncc.edu/ .

5. Veterans Administration (VA). Members who are students can use GI Bill benefits in conjunction with tuition assistance, but only for any unfunded segment. ESOs can guide members in completing the necessary paperwork. Explore additional information on VA benefits outlined in Reference (hh) and on the VA website: https://www.va.gov/education/about-gi-bill-benefits/ .

**CHAPTER 14   UNITED SERVICES MILITARY APPRENTICESHIP PROGRAM
            (USMAP)**

A. General

USMAP is a federally approved apprenticeship program under the guidelines of the U.S. Department of Labor (DOL): Apprenticeship Training, Employer, and Labor Services (ATELS). The program develops highly trained military service personnel who will continue to use their technical skills and knowledge while on active duty. The goal of the program is to develop highly skilled journeyman through military training and experience that will lead to certification in a designated trade, occupation, or craft. USMAP documents the member's military training and experience while on active duty and has been shown to be an effective retention tool. After separation, members who have completed an apprenticeship program will more readily qualify for employment in sought-after civilian trades, such as electronics or welding. Completion of the program leads to certification in a designated trade, occupation, or craft and often means starting jobs with higher pay in the civilian workforce. The U.S. Department of Labor issues a Certificate of Completion of Apprenticeship for individuals successfully completing the USMAP. These members become among the most highly skilled craftsmen in industry.

B. Eligibility

To qualify for the program, enlisted service members must be on active duty, have a high school diploma or General Equivalency Diploma (GED) equivalent, be designated in a job specialty (or rating) with approved apprenticeship skills, and meet the requirement for the journeyman rating.

C. Policy

Each unit is responsible for administering USMAP locally to secure registration of apprentices in the various apprenticeship trades as follows:

1. FORCECOM (FC-CI) must provide policy.

2. RFMCs must notify USMAP of changes to the Work Process Schedule, the outline and schedule of tasks, and provide technical expertise in the establishment of new trade areas.

3. Education Services Officers and designated USMAP Coordinators must provide USMAP information and application in addition to enrollment forms.

4. Training Centers must select an education specialist to be trained as USMAP Coordinator. They can delegate this responsibility to Class "A" School chiefs for the registration of graduating students desiring to enroll in USMAP.

5. Chief Petty Officer Academy must include USMAP in its curriculum.

6. Training Center Cape May must introduce USMAP to recruits.

7. Commanding Officer or Officer-in-Charge are encouraged to designate a USMAP Coordinator and ensure the proper and effective use and check-off of Work Experience Hourly Records of personnel registered in USMAP.

8. Commanding Officer or Officer-in-Charge will report all individual apprentice actions (registrations, cancellations, completions, and suspensions) at https://usmap.netc.navy.mil/usmapss/static/index.htm . CO or OIC may delegate this responsibility to the Education Services Officers or designated USMAP Coordinators.

D. USMAP Coordinator

The primary goal of the USMAP Coordinator is to ensure the Coast Guard Service members have sufficient quantity and quality of information, in a timely manner, to allow them to understand and execute the apprenticeship program correctly. The coordinator must familiarize themselves with the United Services Military Apprenticeship Program and follow the instructions as outlined in the Coordinator Guide found on the USMAP web site. All necessary information and instructions to start and run a USMAP program are available at https://usmap.netc.navy.mil/usmapss/static/index.htm .

CHAPTER 15   ENLISTED RATING ADVANCEMENT TRAINING SYSTEM

A. General

This Chapter discusses the use and management of the Enlisted Rating Advancement Training System (ERATS) and how it supports enlisted personnel preparing for advancement or change in rating.

B. Purpose

ERATS supports the Coast Guard's enlisted advancement system, the objective of which is to ensure the required degree of proficiency at the various grade levels within each rating and advance those best qualified to fill vacancies. ERATS supports this objective in the following ways:

1. Defines core-performance requirement standards for each rating and pay grade.

2. Provides performance support to assist members in meeting requirements.

3. Assesses performance requirements of members preparing for advancement to the next higher grade.

4. Aligns service-related enlisted advancement training requirements with performance standards and industry best practices recognized by the Department of Labor (DOL) and national professional credentialing bodies.

C. Definitions

1. Rating task list: a list of rating specific tasks validated by a team of Accomplished Performers (APs) selected by the Rating Force Master Chief (RFMC).

2. Occupational Analysis (OA): a process that measures the job performance requirements of an occupation or rating. The OA helps to determine the Rating Performance Qualification (RPQ).

3. Rating Performance Qualification (RPQ): rate specific performance requirements that members must complete to be eligible for advancement. RPQs contain the following elements:

    a. Performance: The process of accomplishing an action, task, or function. It is repeatable, measurable, and observable, with a distinct beginning and end.

    b. Condition: The circumstances, to include tools and environment, surrounding a task or performance (real or simulated conditions).

    c. Standard: The instructions for measurement of trainee performance. It may consist of time requirements, error tolerance rates or ratios or law and policy that are critical for

task completion.

    d. Steps: A list of actions or enabling objectives that lead to overall task performance.

    e. Relevant Text: The section or chapter that must be read and understood to perform the task.

    f. Reference: Guides for completing the performance. References come in many forms such as Commandant Instruction, manufacturer's technical publications, videos, audio files, or commercial textbooks.

    g. Supplemental Guidance: Additional instruction provided to the Professional Development Coach (PDC) and trainee to assist in task completion. Supplemental guidance includes the cross walking of previous RPQ's, best practices, common errors, etc.

4. <u>Enlisted Performance Qualification (EPQ)</u>: the equivalence to RPQ, except the requirements are specific to Enlisted Professional Military Education (EPME) and apply to enlisted members regardless of rating.

5. <u>RPQ and EPQ Standards</u>: the documents that contain the rate-specific rating or the Enlisted Professional Military Education (EPME) requirements a member must perform in order to be eligible for advancement at each pay grade. They mark the completion of rating advancement requirements for E-4s to E-9 enlisted members.

6. <u>Rating competency</u>: a competency earned by enlisted members and assigned at unit level upon completion of the RPQ/EPQ standard and earning of any required Core Competencies. The Coast Guard's human resources system maintains a record of rating competencies for the enlisted member to participate in servicewide exam (SWE).

7. <u>Core Competency</u>: specific certifications or qualifications required for advancement or SWE eligibility.

D. Training and Performance Support Programs

The primary location for rating performance support is the ERATS portal page: <u>Enlisted Rating Advancement Training System (ERATS) - Home (sharepoint-mil.us)</u>. The following resources help members to complete requirements for advancement:

1. <u>Class "A" School</u>. Class "A" Schools prepare members to perform the task requirements for advancement to E-4 in their chosen rating. Diver Class "A" School prepares members for E-5. The E-4 RPQ Standard contributes to the design of Class "A" School Terminal Performance Objectives (TPOs). Additional information on Class "A" Schools can be found in Chapter 7 of this Instruction.

2. <u>RPQ and EPQ Standards</u>. These standards are used to record the completion of rating advancement requirements. Each Standard's document contains user instructions,

advancement requirements, RPQs or EPQs, references, supplemental guidance, and professional license information.

a. EPQ standards apply to E-2, and E-5 to E-9. RPQ standards apply to E-4 to E-9.

b. The Rating Training Advisory Council (RTAC) may add, update, or delete individual RPQs or EPQs, ensuring that each RPQ or EPQ meets certain requirements. Each RPQ or EPQ must be a valid performance requirement, and it must be a task (statement of action) describing what a performer must do to produce rating outputs in support of program activities.

c. Tasks are valid training requirements supported by an occupational or other FORCECOM analysis method. They can also be explicit direction prescribed via an organizational authority: Commandant level directive, Flag memo, etc.

d. When provided the appropriate resources, FC-T may approve valid non-resourced RPQs or EPQs. FC-T must send a memo to the respective program detailing resource requirements and impact to training.

e. The Rating or EPME approved task list are "core" performance requirements that have the potential to become RPQs or EPQs.

3. <u>ERATS Performance Support System</u>. ERATS performance support system provides on-demand training and support for members to complete RPQs or EPQs and serves as a continuing reference to support job performance. The Rating Knowledge Manager must maintain the ERATS performance support system which has the following components:

a. Rating Task List.

b. Rating Reference Library (RRL). Located on the Rating Page on the Coast Guard Portal. The RRL must mirror and provide links to all references listed in the master reference list on the RPQ or EPQ standard. The RRL includes references directly linked to the performance of the RPQ or EPQ and advancement testing.

c. Knowledge Repository. The Knowledge Repository provides ready access to information, training resources, and job aids that support RPQ or EPQ completion and performance of duties.

d. Rating Knowledge. Rating Knowledge Managers (RKMs) under advisement from Rating Force Master Chiefs (RFMC) will manage the rating knowledge management portion of the Rating Page providing a single location for dissemination of rating knowledge and performance resources, collaboration of rating members, and promulgation of changes to performance requirements.

4. <u>Assessing Training and Performance Knowledge</u>. The SWE is a norm-referenced assessment that tests Rating and EPME knowledge to rank order members who have completed all eligibility requirements and are competing for advancement. Further information can be found on the PPC portal page: <u>Advancements, Service Validation, and Personnel Data Corrections (ADV) (sharepoint-mil.us)</u>.

E. Organizational Roles and Responsibilities Specific to ERATS

1. <u>FC-T</u>. FC-T is the process owner and approving authority for the Enlisted Rating Advancement Training System. FC-T duties and responsibilities include, but are not limited to:

   a. Assigning ERATs Program Administrator and Chief Rating Knowledge Manager (CRKM) responsibilities.

   b. Managing ERATS process, to include coordination of Occupational Analysis and Facilitation of Rating Training Advisory Councils (RTAC).

   c. Conduct OA in support of rating performance requirements development.

   d. Reviewing and validating RPQ and EPQ Standards administratively.

   e. Managing the storage, access, promulgation, dissemination, and configuration control of RPQ and EPQ Standards and Class "A" School Curriculum Outlines.

   f. Facilitating Class "A" School prerequisites and license or credentialing alignments.

   g. Managing the ERAT's Coast Guard Portal presence and provide administrative oversight to the ERATS and EPME Coast Guard Portal sites.

   h. Establishing evaluation system for measuring ERATS effectiveness.

   i. Developing and administering the advancement testing development processes.

   j. Appointing an ERATS team to coordinate and manage ERATS. This includes administrative review, validation, and configuration control. The team will also store, access, promulgate, and disseminate RPQ and EPQ Standards.

2. <u>Training Centers (TRACENs) must</u>:

   a. Develop Class "A" School curriculum based on E-4 RPQs.

   b. Deliver Class "A" School training content.

   c. Ensure Rating Knowledge Managers (RKM) oversee execution of duties, responsibilities, and ERATS products and processes.

d. Provide oversight and support to RKMs in the development of RPQ and EPQ standards.

e. Oversee the Distance Learning Programs (DLP) and Class "A" School programs by serving as the center of excellence for a specific rating.

3. Rating Force Master Chiefs (RFMC). RFMCs establish rating specific advancement requirements, including enlisted training and performance qualifications. They will assist and advise programs as applicable on potential workforce impacts of existing or proposed policy changes or strategy to their workforce. They also develop and manage a rating portal page for their rating on the Coast Guard Portal.

4. Office of Leadership (CG-128). Commandant (CG-128) serves as the Program Manager (PM) for the Enlisted Professional Military Education (EPME) requirements. The Master Chief Petty Officer of the Coast Guard's Deputy serves as the EPME force master chief.

5. Unit. Unit-level ERATS management is the most critical element in maintaining system integrity. If Commanding Officers identify gaps in ERATS policy, they should contact FC-T for direction. Unit-level ERATS duties and responsibilities include the following:

a. Appoint Professional Development Coaches (PDC) who are in the same rating and at least one pay grade senior to the members they will coach. PDCs for EPQs do not have to be in the same rating as the member they are coaching.

b. Maintain a list of designated PDCs. If an adequate PDC, for a given rating, is not available at the unit, reviewers may assign a PDC from another unit, subject to the approval of reviewers from both commands.

c. In accordance with Reference (w), units must provide opportunities to support enlisted advancement via on-the-job training.

6. Commanding Officers (COs) or Officers in Charge (OIC). The CO or OIC is responsible for the execution of the enlisted advancement program at their unit, as defined in Reference (w). The CO or OIC must provide and coordinate training opportunities for members to complete advancement requirements as unit resources allow. The CO or OIC must assist non-rated members in aligning skills and abilities with appropriate ratings. CO or OIC duties and responsibilities include the following:

a. Ensure the proper execution of enlisted training programs.

b. Verify the completion of RPQ and EPQ performance requirements prior to effecting advancement of personnel.

c. Perform as, or designate, RPQ and EPQ reviewer(s) for certifying RPQ and EPQ completion in Direct Access. Designated reviewers carry the delegated authority of the CO or OIC.

d. Defer an RPQ and EPQ. A CO/OIC cannot delegate this authority.

e. Designate and formally recognize Professional Development Coaches (PDC).

f. Ensure enlisted members have opportunities to pursue and accomplish advancement requirements.

g. Must not impose unit requirements hindering a member's placement on their chosen Class "A" School waiting list.

7. RPQ and EPQ Reviewer. Criteria for RPQ and EPQ Reviewers include the following:

a. The CO or OIC is the reviewer, unless designated.

b. Enlisted reviewers must be at least one pay grade senior to the members they are certifying and be designated in writing by the CO or OIC. Any officer (commissioned or warrant) may serve as a reviewer.

c. The XPO, UTO, and Gold or Silver Badge may certify completion of requirements for members of all ratings. Leading Chief Petty Officers (LCPO) at Air Stations may certify members of the AMT, AET, and AST ratings and are the preferred reviewers for the aviation ratings. Other enlisted reviewers may only certify completion of requirements for members of their own rating at their unit.

d. All pay grades require a rating competency code. The Commanding Officer or RPQ and EPQ Reviewer must verify a candidate has completed the RPQs and EPQs and authorize entry of the rating competency code into the Direct Access (DA) by the unit's Personnel and Administration (P&A) entity.

8. Educational Services Officer (ESO). ESOs must comply with the Education and Training Quota Management Command's (ETQC) directives.

9. Professional Development Coach (PDC). The PDC duties and responsibilities include the following:

a. Training. The PDC must ensure training is in accordance with the instructions provided on the RPQ and EPQ Standards.

b. Evaluation. The PDC must evaluate the member's ability to perform RPQ and EPQ tasks in accordance with RPQ and EPQ standards.

c. Documentation. The PDC must document RPQ and EPQ completion in the RPQ and EPQ Standards.

F. ERATS Administration

Performance Requirements, training programs, and assessments must follow the format and

standards prescribed below:

1. Rating Training Advisory Council (RTAC)

    a. Management. A position's designates membership, unless noted in table 15.1. Stakeholders may designate their representatives via email to the RTAC's RFMC Chair. Principals may delegate their responsibilities with permission from the responsible office chief or Training Director by notifying the RTAC.

        (1) RTAC must work to achieve consensus on decisions but, if necessary, may vote to progress a motion. Principal members are voting members and Advisory members are non-voting participants in the RTAC. In the event of a tie vote on a decision FC-T representation is the tie breaker.

        (2) The RFMC, program representative(s), and Training Manager render decisions regarding addition or deletion of a RPQ or EPQ. Program representatives may only vote on requirements under their authority.

        (3) The RFMC, RKM, Program representative(s), and Training Manager render decisions regarding addition or deletion of RPQs and EPQs. Program representatives may only vote on requirements under their authority.

        (4) Decisions made by the RTAC must not diverge from the RPQ and EPQ criteria and require explicit permission from FC-T.

        (5) RTAC decisions must account for all resources required to accommodate implementation of RPQs and EPQs. Proposals that require additional resources to implement require program sponsor approval. The RTAC must generate supporting documentation for the associated resource proposal. They must obtain a funding commitment by program sponsors when recurring and non-recurring funding needed for new training initiatives, including enhancement, or scaling of existing training programs are not resource neutral. The program sponsor may authorize an offset of a reduction in existing training programs to resource a new training initiative.

Position	Unit	Role	Capacity
Rating Force Master Chief (RFMC)	DCMS, DCO, CGA, COMDT (CG-092), CGIS/FLETC	Chair	Principal
Training Manager	FC-T	To identify or validate need or impact	Principal
Program(s)	DCMS and-or DCO		Principal (name designation required)
Office of Military Personnel (CG-133) Representative			Principal, as required for Core Competencies (Name designation required)
Training Director Representative	TRACEN		Principal (Name designation required)
Chief Rating Knowledge Manager	FC-T	Facilitator	Principle
Occupational Analysis (OA) Team Leader	FC-Tace	To provide additional context or clarity to OA data	Advisory
Rating Knowledge Manager (RKM)	TRACEN		Principal
Supplementary Advisory Roles	Various	Accomplished Performers & Subject Matter Experts	Advisory (ad hoc members)

Table 15.1: Standard RTAC Membership

(6) The RTAC must ensure that advancement training requirements mirror to the greatest extent possible, applicable credentialing requirements found in federal, state, and industry licensing and credentialing organizations.

b. Roles. The RTAC limits voting authority, for decisions not made by consensus, to principal RTAC members, and table 15.1 provides a visual regarding voting authority. The following members comprise each RTAC.

(1) Rating Force Master Chief (RFMC). RFMCs act as the principal advocate for their rating or program area. RFMCs must:

(a) Ensure the RFMC and RKM make up the Rating Leadership;

(b) Ensure rating performance and training requirements align with organizational missions;

(c) Validate ERATS performance and monitoring standards, including authority to audit individual ERATS records;

(d) Work with programs to identify professional credentials and licenses that support normal enlisted performance requirements;

(e) Serve as a Principal RTAC member and chair of the RTAC, and

(f) Prescribe a waiver process to initiate competency waivers for advancement criteria.

(2) The Rating Knowledge Manager (RKM). The RKM is the E-9 position (filled by either an E-8 or E-9 based on rating needs) assigned to each Training Center, serving as FORCECOM's Senior Enlisted Rating Training Representative for their respective rating. The RKM is a core position and holds the overall responsibility for managing a rating's performance support and training material. The RKM roles are as follows:

(a) Principle Member of the RTAC. Continual oversight and management of the rating task list, RPQs and applicable references. The RKM must schedule and facilitate a semi-annual RTAC.

(b) Knowledge Management. Manage a rating-specific website housed on the ERATS portal page. Align advancement performance and training requirements with Dept. of Labor and/or DoD recognized professional licenses and credentials.

(c) Rating Subject Matter Expert. Collaborate and engage with the rate, programs, FC training manager, RFMC, schoolhouses, and the Career Investment Division (FC-CI) on a regular basis via in person and virtual unit visits. Provide support to local Performance Systems Branch (PSB) for curriculum development.

(d) Test Development. Maintain SWE database.

(3) The FORCECOM Chief Rating Knowledge Manager (CRKM). This E-9 position serves on the FC-T ERATS team and oversees the execution of ERATS and standardization across all ratings on behalf of FC-T by scheduling, monitoring, and reporting to all stakeholders on the ERATS process for each rating. The CRKM must:

(a) Serve as Integrator/Chair of ERATS Integrated Process Team (IPT);

(b) Serve as Principal Member and Facilitator for all RTACs integrating best practices, ensuring appropriate supporting policies, systems, and guidance;

(c) Advocate and provide support for each rating's RKM, maintaining the master RPQ Standard template, and facilitating the RKM community of practice; and

(d) Manage the ERATS Community of Practice (ECOP) and all required elements.

(4) ERATS Training Manager (ETM). The ERATS Training Manager represents FC-

T by leading ERATS policy, process implementation, and system management. In addition, the ETM provides oversight of the ERATS system for all ratings and serves as liaison between the training system and programmatic customers. The ETM serves as an advisory member of the RTAC. ETM must:

(a) Validate RPQs and EPQs;

(b) Ensure RPQs and EPQs are resourced or identify requirements in coordination with applicable program;

(c) Validate Class "A" School curriculum outlines; and

(d) Serve as Class "A" School Manager.

(5) FORCECOM Training Managers (TMs). The FORCECOM Training managers serve as liaisons to Program Representatives and assist Programs in defining performance requirements supporting program activities. TMs must:

(a) Communicate and clarify Training System Processes;

(b) Assist program stakeholders with interpretation of OA Results;

(c) Work with PMs to identify professional credentials applicable to rating performance to be communicated to the VCP; and

(d) Serves as a Principal Member of the RTAC.

(6) TRACEN Training Director (TD). The TD or designate represents TRACEN equities in the ERATS process. The TD will ensure that current Class "A" School curriculum strictly adheres to the requirements outlined within E-4 tasks for each rating. It must be updated during each rating review. TDs must assist in identifying resource concerns and should address these with the RTAC outside of the Occupational Analysis and Rating Review process. The TD is a principal member of RTAC.

(7) Program Manager/Representative (PM). PMs are the principal advocates for their program area, ensuring performance requirements support program activities. Coast Guard Program Offices must:

(a) Assign permanent members to the RTAC as principals on their behalf;

(b) Provide necessary resources to carry out training; and

(c) Identify and approve professional credentials/licenses that align with enlisted rating performance qualifications.

(8) Advisory Members. These members have in-depth experience or special skills.

They advise and assist the RTAC in the management but do not have voting authority.

    (9) Office of Military Personnel (CG-133). A Commandant (CG-1) representative is a subject matter expert for all enlisted advancement criteria to ensure decisions and standards adhere to policy outlined in Reference (w).

2. <u>The Rating and EPME Qualifications Review Process</u>. FORCECOM Training Division (FC-T) conducts the Qualifications Review Process for every rating and EPME. Once every rating and EPME has been reviewed (approximately every 4 years), the review cycle is complete, and a new review cycle is initiated. Prior to the initiation of a new review cycle period, all stakeholders must convene to develop the review schedule for the next cycle. The process includes the Occupational Analysis, Task Analysis, Performance Support Materials Development, Knowledge Management, and Life Cycle Support.

3. <u>RPQ/EPQ Change Process</u>. The RPQ/EPQ Change Process serves as the method for documenting and processing all changes to RPQs/EPQs or RPQ/EPQ Standards outside the Qualifications Review Process. The Training System's SOP outlines change authority and approval levels. FC-T must approve all changes affecting Class "A" School curriculum.

4. <u>Curriculum updates process</u>. Curriculum updates must follow the rating's Rating Review cycle superseding the normal triennial curriculum review. A School Curriculum outline's development will follow processes outlined in the Training System's Standard Operating Procedures. RPQ and EPQ Standards must serve as the curriculum outline for each pay grade. RPQ and EPQ standards are routed for FC-T approval using signature page template in the Coast Guard's Training System' SOP, Volume 9, Enlisted Rating Advancement Training System (ERATS).

5. <u>Core Competency requirements</u>. Members must complete competencies, as required by Reference (w) for their grade and rating to compete in the SWE competition. All requests to establish core competencies are routed for concurrent clearance through the RTAC and a memo submitted for approval by Commandant (CG-133). All core competencies must be valid, must be current and listed in the Coast Guard competency dictionary and must not require attendance at a Class "C" school. They must address the following concerns:

    a. Members must have access and opportunity to meet core competency requirements for advancement, unit location, resource availability, tour lengths, time in grade for a rate, and status (active duty or reserve).

    b. Programs may designate alternate or combinations of core competencies to increase opportunities for meeting core competency requirements and ensuring due regard for the diversity of missions performed by a rating. When designating alternate competencies, they should be equal in terms of the level of effort and time required to obtain them.

    c. In units where it is not possible for a member to earn a core competency, they are

designated in the promulgation ALCOAST as a "non-core" unit. The RFMC must prescribe a waiver process or competency alternative for members assigned to non-core unit.

d. According to Reference (w), Commanding Officer (CG PPC) is the only authority for enlisted advancement criteria, to include core competencies.

G. Policy

FORCECOM (FC-T) uses the policy standards in this Manual to develop, publish, and administer the ERATS. Enlisted training is analyzed, designed, developed, implemented, and evaluated in accordance with these policies. COs or OICs must not impose requirements in addition to those contained in this policy or outlined in Reference (w).

Appendix A. ACRONYMS

ACE-American Council on Education

ADOS-Active Duty for Operational Support

AEP-Advanced Education Program

AE-Advanced Education

AEPA-Advanced Education Program Administrator

AEPM-Advanced Education Program Manager

AESM-Student Manager

AFCT-Armed Forces Classification Test

AFQT-Armed Forces Qualification Test

AP-Accomplished Performers

ASVAB-Armed Services Vocational Aptitude Battery

ATELS-Apprenticeship Training, Employer, and Labor Services

CAC-Common Access Card

CA-Credentialing Assistance

CCM-Civilian Career Management

CFR-Code of Federal Regulations

CGA-Coast Guard Academy

CITP-Criminal Investigative Training Program

CM-Course Manager

CO-Commanding Officer

COR-Contracting Officer Representative

CRKM-Chief Rating Knowledge Manager

CSA-Cost Share Agreement

CSPI-College Student Pre-Commissioning Initiative

DA-Direct Access

DANTES-Defense Activity for Non-Traditional Education Support

DCO-Direct Commission Officer

DEPOT-Direct Entry Petty Officer Training program

DHS-Department of Homeland Security

DL-Distance Learning

DOL-Department of Labor

DPP-Degree Plan Proposal

EAD-Extended Active Duty

EHRI-Enterprise Human Resources Integration

EPME-Enlisted Professional Military Education

Epm-Enlisted personnel management

EPQ-Enlisted Performance Qualifications

EPSS-Electronic Performance Support System

ERATs-Enlisted Rating Advancement Training

ESO-Education Services Officer

ESS-Employee Summary Sheet

ETQC-Education and Training Quota Management Command

ETR-Electronic Training Request

FOT-Facilitated Online Training

GED-General Equivalency Diploma

HPT – Human Performance Technology

IDT-Inactive Duty for Training

IPAP-Interservice Physician Assistant Program

IT-Information Technology

ITO-Inter-Service Training Office

JQR-Job Qualification Requirements

LCPO-Lead Chief Petty Officer

LMS-Learning Management System

MTL-Master Training List

MT- Mandated Training

NTSB-National Transportation Safety Board

OA-Occupational Analysis

OAP-Officer Accession Plan

OCS-Officer Candidate School

OGA-Other Government Agency

OIC-Officer-in-Charge

OPM-Office of Personnel Management

Opm-Officer personnel management

OSP-Olmsted Scholar Program

PCS-Permanent Change of Station

PDC-Professional Development Coach

PM-Program Manager

PQS-Personnel Qualification Standards

PRG-Peer Review Group

PSB-Performance System Branch

PSC-Personnel Service Center

RFMC-Rating Force Master Chief

RKM-Rating Knowledge Manager

RM-Resource Manager

ROCI-Reserve Officer Candidate Indoctrination

RPQ-Rating Performance Qualifications

RTAC-Rating Training Advisory Council

SECCEN-Security Center

SEFP-Senior Executive Fellowship Program

SELC-Systems Engineering Life Cycle

SM-Student Manager

SOJT-Structured On-the-Job Training

SPeL-Self-Paced eLearning

SPO-Servicing Personnel Office

SSS-Senior Service Schools

SWE-Service Wide Exam

TAB-Training Allowance Billet

TA-Tuition Assistance

TCO-Test Control Officer

TD-Training Director

TM-Training Manager

TRACEN-Training Centers

TRASYS-Training System

TTP-Tactics, Techniques, and Procedures

USC-US Code

USMAP-United Services Military Apprenticeship Program

UTB-Unit Training Board

UTO-Unit Training Officer

UTPO-Unit Training Petty Officer

VCP-Voluntary Credential Program

VolED-Voluntary Education Program

WQS-Watch Qualification Standards

XPO-Executive Petty Office

Appendix B. GLOSSARY

Adjunct Instructor: An instructor, not assigned to a training center, trained, and certified to deliver a specific curriculum in its entirety. Examples include Team Coordination Training, Instructor Pilot, etc.

Advanced Education Program Administrator (AEPA): Liaise between Advanced Education Student Managers (AESM) and FC-Bex to ensure the integrity of programmatic and fiscal requirements. Additionally, the AEPA drafts policy to ensure current process remain relevant to programmatic needs.

Advanced Education Program Manager (AEPM): Provides senior leadership and programmatic oversight of all matters associated with Advanced Education Program to include AE TABs, policy, and processes. Additionally, the AEPM serves as an appellate during disputes.

Advanced Education Student Manager (AESM): Provides support for selectees from onboarding into the AE Program to re-integrating into the workforce. Student Managers report to the PM and the AEPM.

Advanced Training: Training that provides the member with the skills and knowledge necessary to perform unit and billet specific requirements.

Armed Forces Classification Test (AFCT): A multiple-choice test administered to in-service personnel trying to increase their DoD Armed Services Vocational Aptitude Battery (ASVAB) scores.

Armed Services Vocational Aptitude Battery (ASVAB) Test: A multiple choice test only administered to applicants through recruiting offices via the Military Entrance Processing Station (MEPS) for members initially entering the Coast Guard. Any retest taken after entering the Coast Guard to increase test scores to qualify for various training and education programs within the Coast Guard require taking the AFCT.

Armed Forces Qualification Test (AFQT): A score that is mathematically calculated using a combination of scores from specific sections of the ASVAB. This score is used to establish eligibility for certain training opportunities.

Auxiliary Training: Training conducted for members of the Coast Guard Auxiliary to enhance performance qualifications.

Blended Learning: A performance intervention combining any of two training modalities.

Competencies: The job-related knowledge, skills, abilities, and personal attributes that a person exercises while performing the business of any given position.

Condition: The circumstances, to include tools and environment, surrounding a task or performance (real or simulated conditions).

Core Competency: Specific certifications or qualifications required for advancement or SWE eligibility.

Course Manager (CM): The staff officer at Headquarters who is responsible for monitoring course execution, quotas, and currency of the course contents. Course Managers report to the PM.

Development: An individual's learning that focuses on growth opportunities that are career driven.

Education: An individual's learning that focuses on skills and knowledge that are broad based and subject matter driven.

E-Learning: The acquisition of knowledge that takes place through electronic technologies and media.

Eligibility: Qualifying requirements that must be met before consideration for a course or program.

Enabling Objective (EO): A statement that describes a physical or thinking skill (i.e., discrimination or generalization) and defines in measurable and observable terms a step necessary to accomplish the related TPO.

Enlisted Performance Qualifications (EPQ): EPQs are those core competencies that enlisted personnel in each rating are required to successfully perform. EPQs are directly reflective of job tasks required for mission accomplishment. They are a foundational element to the enlisted advancement system.

Enlisted Professional Military Education (EPME): The EPME program teaches facts and concepts which serve to influence behavior for cultural application and develop cognitive ability for problem solving.

Enlisted Rating-Entry Performance Training: Class "A" School prepares enlisted E-2 & E-3 members to perform the technical duties of Third-Class Petty Officers in a specific rating.

Evaluation: A multilevel, systematic method for gathering data about the effectiveness of training programs. Measurement results are used to improve the offering, determine whether the learning objectives have been achieved, and assess the value of the training to the organization.

Exportable Training: Instructional training which is conducted at a local unit by training teams or instructors from a resident training facility, using resident course materials.

Formal Training: A course developed to fulfill a programmatic requirement providing skills and knowledge training to improve an individual's performance. Refer to Chapter Two for additional terminology relevant to Formal Training.

1. Is produced and delivered by either a Coast Guard Training Center (TRACEN), a government agency or, or a commercial contractor.

2. Occurs within one of more of the following training environments: residential, exportable, remote, online, facilitated online, structured-on-the-job, or blended-learning.

3. Has a Coast Guard course number.

General Detail: The difference between authorized billets (the number of billets authorized by Congress, i.e., operating strength) and the combination of assigned (issued to the field – i.e., program manning) and pending billets consisting of two subsets: training allowance and support allowance.

Guest Instructor: Formal part of curriculum delivery, not required to be a qualified instructor, but supports delivery of specific instruction based on external mandate/requirement for subject matter expertise.

Guest Speaker: Not a formal part of the curriculum, available at a program's request and with program resourcing. These engagements cannot interfere with the delivery of the approved curriculum basis. The use of Guest Speakers must be approved by PM.

Informal Training: Learning that occurs outside a structured program, plan, or class. This type of learning occurs naturally through observations, trial, and error, and talking and collaborating with others.

Job Aid: A storage place for information, other than the brain, that is accessed on –the-job, in real time and puts the user under stimulus control. A guide that supports on-the-job performance by helping personnel execute tasks otherwise done infrequently, are too complex to memorize, or are comprised of critical steps. Job aids may supplement or replace training.

Job Qualifications Requirements (JQR): JQR is a locally produced, unit level, requirement used whenever there is no existing PQS to cover a specific watch station function or maintenance requirement. JQR is not part of the enlisted advancement system.

Kirkpatrick Levels of Evaluation: A training evaluation process developed by Dr. Donald Kirkpatrick for determining the effectiveness of training, consisting of four levels: reaction, learning, behavior, and results.

> **Level One - Reaction**: The first level of Kirkpatrick's Four Levels of Evaluation. It measures participants' reaction to and satisfaction with a training program.

> **Level Two - Learning**: The second level of Kirkpatrick's Four Levels of Evaluation. It measures the participant's acquisition of cognitive knowledge or behavioral skills.

> **Level Three - Behavior**: The third level of Kirkpatrick's Four Levels of Evaluation. It measures the degree to which training participants can transfer what they have learned to workplace behaviors.

> **Level Four - Results**: The fourth level of Kirkpatrick's Four Levels of Evaluation. It measures the effect of the learning on organizational performance.

Mandated Training (MT): Training conducted throughout the Coast Guard on common military subjects for military and civilian personnel. Examples include first aid, drug education, Sexual Harassment Prevention, etc.

Non-Resident Training: Training that does not require travel to a specific training location.

On-the-Job Training (OJT): Training normally conducted at the duty station by unit personnel. OJT provides unit specific knowledge and skills to improve an individual's job performance.

Occupational Analysis (OA):   A process that measures an occupation's job performance requirements and world of work at a particular point in time. OA, as an integral part of the Rating Performance Qualifications (RPQ) process.

Performance: The process of accomplishing an action, task, or function. It is repeatable, measurable, and observable, with a distinct beginning and end.

Performance Based Training: An outcome-based method of instruction that measures the member's ability to perform the task using the prerequisite knowledge.

Personnel Qualification Standard (PQS): PQS is a compilation of the minimum knowledge, skills, and ability that an individual must demonstrate in order to qualify to stand watches or perform duties necessary for the safe, secure, and proper operation of a mission or specific job. PQS is not part of the enlisted advancement system.

Pre-arrival Training: Training that is essential for a member to have completed prior to arriving at their new unit. This training is normally conducted on a TDY basis before members PCS but may be conducted in route.

Prerequisites: Requirements and/or conditions that are required to enter a course or program of instruction.

Professional Education: Course of instruction at one of the War Colleges, Armed Forces Staff College, or Industrial College of the Armed Forces.

Program Manager (PM): The Staff Officer at Headquarters designated by the Program Director for the detailed management of a Coast Guard program.

Quota: A reserved space for a student in a course.

Rating Competency: A competency earned by enlisted members and assigned at unit level upon completion of the RPQ/EPQ standard and earning of any required Core Competencies.

Rating Performance Qualification (RPQ): Rate specific performance requirements that members must complete to be eligible for advancement.

Rating Task List: A list of rating specific tasks validated by a team of Accomplished Performers (APs) selected by the Rating Force Master Chief (RFMC).

Recruit Training: An instructional program designed to introduce members to the Coast Guard and provide enlistees with fundamental skills and knowledge necessary to work in a military environment.

Reference: Guides for completing the performance. References come in many forms such as Commandant Instruction, manufacturer's technical publications, videos, audio files, or commercial textbooks.

Relevant Text: The section or chapter that must be read and understood to perform the task.

Remote Training: Interactive training delivered in a remote environment. Students attend course with live video conference instruction that is often followed by self-paced study. Students demonstrate their knowledge of each competency through full-class activities, self-paced work/exercises, and a cumulative capstone. This term is often used interchangeably with *Virtual Training* or *Facilitated Online Training (FOT)*.

Resident Training: A course that involves students traveling (either local or TDY) to a physical training space, usually a training center; can include exportable training.

Required Training: Training deemed essential to a specific billet. It does not require completion before reporting.

Self-Paced eLearning (SPeL): Instruction that provides learning solutions to support Coast Guard mission requirements; is accessible on demand via a computer using technology appropriate to the user's environment; focuses on supporting a measurable change in behavior or attitude that provides tangible benefits to the mission; and whose solutions are deliverable over a network to ease maintenance updates and tracked to provide decision support and accountability.

Senior Service Schools (SSS): Schools that prepare senior military and civilian personnel for executive positions to broaden an officer's professional base.

Short Term: Duration of instruction less than 20 weeks for military personnel or 120 calendar days or less for civilian personnel that does not require a permanent change of station.

Specialized Training: Training that provides the member with the skills and knowledge to perform specific career-oriented requirements.

Standard: The instructions for measurement of trainee performance. It may consist of time requirements, error tolerance rates or ratios or law and policy that are critical for task completion.

Standard Operating Procedures (SOP): A Policy document identifying the performance steps in the performance of a specific function. SOPs establish clear processes, define terminology, and enable consistent, quality outputs.

Steps: A list of actions or enabling objectives that lead to overall task performance.

Supplemental Guidance: Additional instruction provided to the Professional Development Coach (PDC) and trainee to assist in task completion. Supplemental guidance includes the cross walking of previous RPQ's, best practices, common errors, etc.

Terminal Performance Objective (TPO): A statement that describes the task students will be required to do upon completion of the instruction and to graduate from the course.

Training Manager: The staff at FORCECOM responsible for managing curricula development and approval and furthering the Coast Guard's performance-based training in all aspects of the assigned program area.

Training Director: The Training Director leads the TRACEN and is responsible for all the training executed under the auspices of the TRACEN Commanding Officer.

Training Allowance Billets (TAB): The identification of training allowance billets by type of training and pay grade. Part of the General Detail identified in the PAL with a PCN and BCN.

Training System (TRASYS): The collective of training centers, training units and training support units in the FORCECOM enterprise.

Unit Training: Training intended to mold and coordinate actions and activities of individuals and teams into a single effective force.

Virtual Training: Remote electronic learning (e-Learning), either synchronous or asynchronous, that is either instructor led or self-paced.

Voluntary Education: Programs or courses taken during off-duty hours that are educational in nature and may, or may not, lead to a degree.

Work Process Schedule: A WPS is specific to USMAP and is a breakdown of the work experience an apprentice must complete. Competency-based apprenticeships also use a WPS for defining job functions with specific competencies for mastery.