

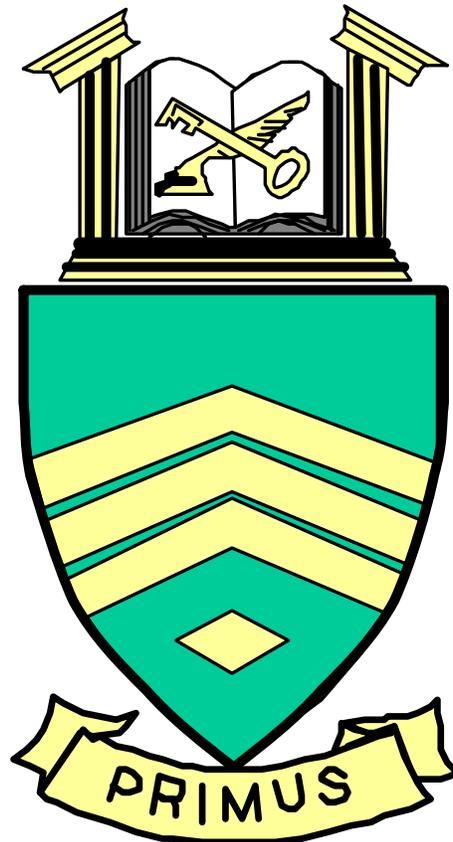
U.S. ARMY SERGEANTS MAJOR ACADEMY (FSC-TATS)

T654

OCT 04

LONG AND SHORT RANGE PLANNING

TRAINING SUPPORT PACKAGE



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TRAINING SUPPORT PACKAGE (TSP)

TSP Number / Title	T654 / LONG AND SHORT-RANGE PLANNING
Effective Date	01 Oct 2004
Supersedes TSP(s) / Lesson(s)	T654, Long-and Short-Range Planning, Oct 03.
TSP Users	521-SQIM, First Sergeant Course
Proponent	The proponent for this document is the Sergeants Major Academy.
Improvement Comments	<p>Users are invited to send comments and suggested improvements on DA Form 2028, <i>Recommended Changes to Publications and Blank Forms</i>. Completed forms, or equivalent response, will be mailed or attached to electronic e-mail and transmitted to:</p> <p>COMDT USASMA ATTN ATSS DCF BLDG 11291 BIGGS FIELD FORT BLISS TX 79918-8002</p> <p>Telephone (Comm) (915) 568-8875 Telephone (DSN) 978-8875</p> <p>E-mail: atss-dcd@bliss.army.mil</p>
Security Clearance / Access	Unclassified
Foreign Disclosure Restrictions	FD5. This product/publication has been reviewed by the product developers in coordination with the USASMA foreign disclosure authority. This product is releasable to students from all requesting foreign countries without restrictions.

PREFACE

Purpose

This Training Support Package provides the instructor with a standardized lesson plan for presenting instruction for:

Task Number

Task Title

800-400-6AAB

Plan Battle Focused Training at the Company Level

This TSP
Contains

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**LONG AND SHORT RANGE PLANNING
T654 / Version 1
01 Oct 2004**

SECTION I. ADMINISTRATIVE DATA

All Courses Including This Lesson	<u>Course Number</u> 521-SQIM	<u>Version</u> 1	<u>Course Title</u> First Sergeant Course
	<hr/>		
Task(s) Taught(*) or Supported	<u>Task Number</u> 800-400-6AAB (*)	<u>Task Title</u> Plan Battle Focused Training at the Company Level	
	<hr/>		
Reinforced Task(s)	<u>Task Number</u> 800-400-AAAP	<u>Task Title</u> Conduct Battle Focused Training	
	878-400-5ABX	Develop a Unit Mission Essential Task List (METL)	
	878-400-7AAQ	Prepare the Battalion (Company) Individual Training Portion of the Quarterly Training Briefing (QTB)	
	878-400-7AAR	Advise the Commander on the Status of Individual and Unit Training	
	878-400-7AAS	Assess Individual Training to Support the Battalion (Company) Mission Essential Task List (METL)	
	878-400-7AAT	Manage Training Distractors	
	878-400-7AAU	Implement the Battalion (Company) Noncommissioned Officer Development Program (NCODP)	
	878-400-AAAQ	Conduct an After Action Review	
Academic Hours	The academic hours required to teach this lesson are as follows:		
		<u>Resident Hours/Methods</u>	
		1 hr	/ Conference / Discussion
		2 hrs	/ Role Playing
Test		0 hrs	
Test Review		0 hrs	
	Total Hours:	3 hrs	
Test Lesson Number		<u>Hours</u>	<u>Lesson No.</u>
	Testing (to include test review)	_____	N/A _____
Prerequisite Lesson(s)	<u>Lesson Number</u> T651	<u>Lesson Title</u> TRAIN A COMPANY, OVERVIEW	
	<hr/>		
Clearance Access	Security Level: Unclassified Requirements: There are no clearance or access requirements for the lesson.		
Foreign Disclosure Restrictions	FD5. This product/publication has been reviewed by the product developers in coordination with the USASMA foreign disclosure authority. This product is releasable to students from all requesting foreign countries without restrictions.		

References

<u>Number</u>	<u>Title</u>	<u>Date</u>	<u>Additional Information</u>
FM 7-1	BATTLE FOCUSED TRAINING	15 Sep 2003	

Student Study Assignments

Before class--

- Read FM 7-1, Chapter 4, and App E, F and H.
- Read PE-1, and prepare slides for QTB role.
- Read Advance Sheet.

During class--

- Participate in classroom discussion.
- Complete PE-1.

After class--

- Review classroom notes and materials.
- Return recoverable materials to the instructor.

Instructor Requirements

1:14, MSG, FSC Grad, ITC, SGITC, and VTT-ITC (VTT only) qualified

Additional Support Personnel Requirements

<u>Name</u>	<u>Stu Ratio</u>	<u>Qty</u>	<u>Man Hours</u>
One site coordinator at each VTT site to operate the TNET equipment and coordinate classroom instruction. Must be FSC grad, served as 1SG, ITC, and SGITC qualified. (Enlisted)	1:14	2	6 hrs
Video, audio and audio linkage equipment operator (optional) at each remote site. (Enlisted)	1:14	1	3 hrs
Video, audio, and audio linkage equipment operator at principal VTT site. (Enlisted)	1:14	1	3 hrs

Equipment Required for Instruction

<u>Id Name</u>	<u>Stu Ratio</u>	<u>Instr Ratio</u>	<u>Spt</u>	<u>Qty</u>	<u>Exp</u>
702101T134520 DELL CPU, MONITOR, MOUSE, KEYBOARD	1:14	1:1	No	1	No
FSC-1 TNET COMMUNICATIONS EQUIPMENT SUITE (VTT LESSON ONLY)	1:14	1:1	No	1	No
FSC-10 INFOCUS LCD PROJECTOR	1:14	1:1	No	1	No
FSC-11 PROJECTION SCREEN	1:14	1:1	No	1	No
FSC-2 TNET ROOM EQUIPMENT SUITE (VTT LESSON ONLY)	1:14	1:1	No	1	No
FSC-3 TNET AUDIO/VIDEO LINKAGE EQUIPMENT (VTT LESSON ONLY)	1:14	1:1	No	1	No
FSC-4 TV MONITOR 32 INCH	1:14	1:1	No	1	No

FSC-6 WINDOWS OS, MICROSOFT INTERNET EXPLORER, MSOFFICE, FTP SITE SOFTWARE	1:14	1:1	No	1	No
FSC-7 VIEWGRAPH OVERHEAD PROJECTOR	1:14	1:1	No	1	No
FSC-8 WHITE BOARD	1:14	1:1	No	1	No

* Before Id indicates a TADSS

**Materials
Required**

Instructor Materials:

- VGTs: 12.
- TSP.
- FM 7-1.

Student Materials:

- FM 7-1.
- Pen or pencil and writing paper.

**Classroom,
Training Area,
and Range
Requirements**

CLASSROOM XXI WITH T-NET CAPABILITY (VTT)
CLASSROOM, GENERAL PURPOSE, 600 SF, 16 PN

**Ammunition
Requirements**

<u>Id</u>	<u>Name</u>	<u>Exp</u>	<u>Stu Ratio</u>	<u>Instr Ratio</u>	<u>Spt Qty</u>
None					

**Instructional
Guidance**

NOTE: Before presenting this lesson, instructors must thoroughly prepare by studying this lesson and identified reference material.

Before class--

1 day prior to the start of class.

- Read all TSP material.
- Issue PE-1 and assign individual QTB roles to selected students.
- Class size may require the instructor to adjust the class timeline.
- Conduct this lesson using the small group instruction method.

During class--

- Remind the students about the mission.
- Tell students without QTB roles that they must assist the QTB chain of command (PE 1) with the development of the QTB.
- Conduct class in accordance with the Training Support Package (TSP).
- Ensure students share experiences that relate to the material, if any.
- The DL (VTT) instructor will select an appropriate site prior to asking a student a question.
- Use the questions provided to generate discussion among the students at the different sites.

After class--

- Report any lesson discrepancies to the senior instructor.

**Proponent
Lesson Plan
Approvals**

<u>Name</u>	<u>Rank</u>	<u>Position</u>	<u>Date</u>
Santa Barbara, Robert A.	GS-09	Training Specialist	
Adams, Chris L.	SGM	Chief Instructor, FSC	
Graham, Kevin L.	MSG	Chief, FSC	
Gratton, Steven M.	SGM	Chief, Functional Courses	
Bucher, George V.	GS-11	Chief, CMD	
Lemon, Marion	SGM	Chief, CDD	

SECTION II. INTRODUCTION

Method of Instruction: Conference / Discussion
Technique of Delivery: Small Group Instruction (SGI)
Instructor to Student Ratio is: 1:14
Time of Instruction: 5 mins
Media: VGT-1

Motivator

Camera: Main camera on the instructor. Ask each Site Coordinator at the Distance Learning sites if they are prepared for training.

SHOW VGT-1, PLANNING

PLANNING

- Long-range planning.
- Short-range planning.
- Near-term planning (discussed in T655).

T654 OCT 04/VGT-1

Ref: FM 7-1, p 4-46, Fig 4-23

Planning is a centralized process that aligns training priorities with wartime requirements and links the unit METL to the execution of battle focused training. The planning process consists of defined long-range, short-range, and near-term planning to discipline the process and ensure that the unit meets resource windows. In the next three hours, we will examine how leaders plan training based on the unit METL.

REMOVE VGT-1

Terminal Learning Objective

NOTE: Inform the students of the following Terminal Learning Objective requirements. At the completion of this lesson, you [the student] will:

Action:	Explain the requirements for long-and short-range planning.
Conditions:	As a first sergeant, in a classroom environment, given FM 7-1.
Standards:	Explained the requirements for long-and short-range planning IAW FM 7-1.

**Safety
Requirements**

None

**Risk
Assessment
Level**

Low

**Environmental
Considerations**

NOTE: It is the responsibility of all soldiers and DA civilians to protect the environment from damage.

None

Evaluation

At the end of this module you will receive a written, objective examination. It will test your learning of the objectives from this and other lessons. You must correctly answer at least 70 percent (28 out of 40) of the questions to receive a GO.

**Instructional
Lead-In**

During the next three hours we will discuss how the planning process begins with the commanders assessment of the proficiency of his unit on each METL task. The planning process incorporates strategies, specific dates, and resources to fit required training events and activities to improve or sustain the unit's proficiency on each METL task.

SECTION III. PRESENTATION

NOTE: Inform the students of the Enabling Learning Objective requirements.

A. ENABLING LEARNING OBJECTIVE

ACTION:	Explain the long-range planning process.
CONDITIONS:	As a first sergeant, in a classroom environment, given FM 7-1.
STANDARDS:	Explained the long-range planning process IAW FM 7-1.

1. Learning Step / Activity 1. Long-Range Planning

Method of Instruction: Conference / Discussion
 Technique of Delivery: Small Group Instruction (SGI)
 Instructor to Student Ratio: 1:14
 Time of Instruction: 20 mins
 Media: VGT-2 and VGT-3

NOTE: Divide the class into three groups and assign them one of the three ELOs. For VTT training, designate each site as a group. The briefing must be in their own words, no reading, and examples must be a part of the briefing. Ensure the discussion covers the main idea of each paragraph.

At this time, I will divide you into groups. Each VTT training site will represent a single group. You are to prepare and discuss a briefing on one of the three ELOs. Record the key points and prepare a briefing to present to the other training groups. You will have ten minutes to discuss your assigned topic. During that time, you are to elect a group spokesperson to present your discussion points. Each group will have ten minutes to present their material to the rest of the class. The briefing must be in your own words, no reading, and you must give examples of how your unit or you engage at this level of war.

NOTE: Briefing responsibility

<u>Prep for Briefing</u>		<u>Instructor</u>	
ELO A	Explain the long-range planning process	Group 1	10 min
ELO B	Explain the short-range planning process	Group 2	10 min
ELO C	Explain the quarterly training briefing process	Group 3	10 min

The planning process incorporates strategies, specific dates, and resources to fit required training. The first topic we will discuss is the long-range planning process.

QUESTION: What are the elements of long-range planning?

ANSWER: See VGT-2.

SHOW VGT-2, LONG-RANGE PLANNING



Ref: FM 7-1, p 4-3, para 4-7; p 4-45, para 4-95; p 4-47, para 4-100; and p 4-49, para 4-108

NOTE: Limit student discussion to the following points:

- *Unit Assessment.* This is the commander's reference for long-range plans. This assessment identifies unit strengths and weaknesses.
- *Commander's Training Guidance.* This guidance and long-range planning calendars give battalion and subordinate commanders time to plan training.

NOTE: Ensure students discuss the difference between active component (Table 4-18) and reserve component (Table 4-19) long-range planning cycles on pp 4-54 and 4-55.

- *Time Management.* Commanders organize training time during long-range planning using the time management system.
- *Planning Calendars.* These are graphic depictions of upcoming training.

REMOVE VGT-2

QUESTION: How long is the long-range future planning horizon for an active component battalion/squadron/separate company?

ANSWER: At least one year.

Ref: FM 7-1, p 4-54, Table 4-18

During long-range planning, commanders organize training time using time management systems.

QUESTION: What is the purpose of a time management system?

ANSWER: The purpose of a time management system is to protect training for subordinate units.

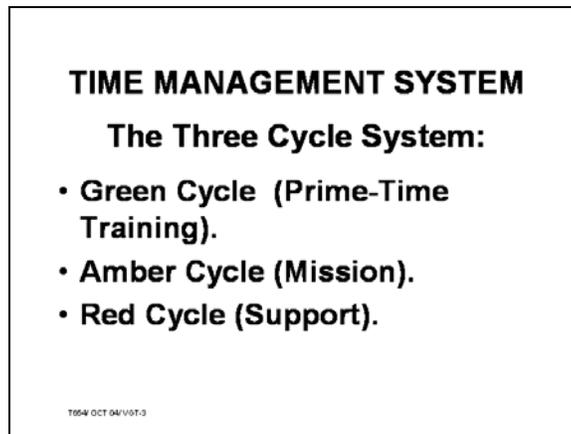
Ref: FM 7-1, p 4-49, para 4-108

We use various types of time management systems throughout the Army.

QUESTION: What are the color-coded time periods for the three-cycle time management system?

ANSWER: See VGT-3.

SHOW VGT-3, TIME MANAGEMENT SYSTEM



Ref: FM 7-1, p 4-50, Fig 4-24

NOTE: Ensure students discuss the Green-Amber-Red time management system on p 4-50, Fig. 4-24. Briefly discuss the two cycle system and time management for slice units on pp 4-50 and 4-51, para 4-112.

REMOVE VGT-3

CHECK ON LEARNING: PE-1 serves as the check on learning for this lesson.

B. ENABLING LEARNING OBJECTIVE

ACTION:	Explain the short-range planning process.
CONDITIONS:	As a first sergeant, in a classroom environment, given FM 7-1.
STANDARDS:	Explained the short-range planning process IAW FM 7-1.

1. Learning Step / Activity 1. Short-Range Planning Process

Method of Instruction: Conference / Discussion
Technique of Delivery: Small Group Instruction (SGI)
Instructor to Student Ratio: 1:14
Time of Instruction: 10 mins
Media: VGT-4 thru VGT-7

During the short-range planning process, the commander defines the long-range plan in greater detail.

QUESTION: What is the focus of short-range planning?

ANSWER: Short-range planning refines the long-range calendar and defines in greater detail the broad guidance on training events and other activities outlined in the senior commander's CTG and depicted on the long-range calendar.

Ref: FM 7-1, p 4-56, para 4-122

QUESTION: What are the elements of short-range planning?

ANSWER: See VGT-4.

NOTE: Show VGT-4 as students respond. Limit discussion to the key points of each element. Discuss Tables 4-20 and 4-21, explaining the difference between the active and reserve components planning and training assessments.

SHOW VGT-4, SHORT-RANGE PLANNING



Ref: FM 7-1, p 4-57, Fig 4-28

REMOVE VGT-4

The short-range planning process begins with a detailed training assessment of the unit's current proficiency on each METL task.

QUESTION: What is the short-range planning horizon for an Active Component battalion?

ANSWER: Three months.

Ref: FM 7-1, p 4-57, Table 4-20

The risk management process is a key element of the short-range planning process.

QUESTION: What is risk management?

ANSWER: Risk management identifies, assesses, and controls risks arising from operational factors and makes decisions to balance risk cost with mission benefits.

Ref: FM 7-1, p H-1, para H-3

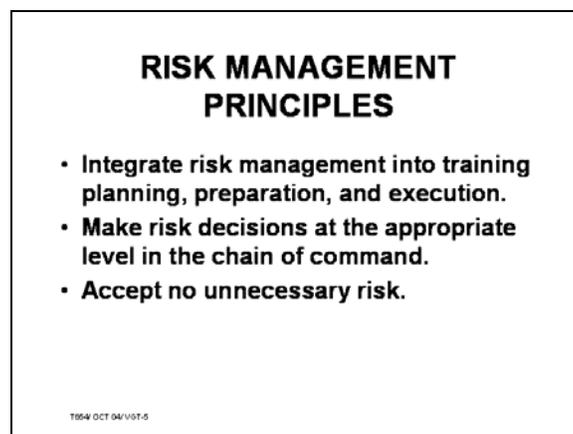
NOTE: This topic was covered in a previous lesson. Keep student discussion brief.

- During short-range planning, leaders identify any significant environmental constraints to training (example: endangered species habitats that may be off-limits). Leaders also identify any potential impacts on the environment (example: damage to forest areas or contamination of water sources). Then the unit and installation environmental coordinators meet to identify problem areas and develop mitigation plans.
- All soldiers and leaders share responsibility for safe training.

QUESTION: What are the risk management principles?

ANSWER: See VGT-5.

SHOW VGT-5, RISK MANAGEMENT



Ref: FM 7-1, pp H-2 and H-3, para H-8 thru H-10

REMOVE VGT-5

NOTE: Ensure students emphasize that the risk assessment process is not a one-time function. During any operation, leaders reassess risks whenever conditions change.

NOTE: Risk analysis for training includes risks to the environment, personnel, and equipment. Good leaders conduct training with concern for conservation and future availability of training areas.

The commander's guidance, his written training strategy, conveys the higher commander's training objectives, priorities, and training event highlights. This guidance provides the details for training schedule development.

QUESTION: What topics does the quarterly training guidance (QTG) address?

ANSWER: See VGT-6 and VGT-7.

SHOW VGT-6, QTG TOPICS

QTG TOPICS

- **Commander's assessment of METL.**
- **Training priorities.**
- **Combined arms training.**
- **Organizational inspection program.**
- **JIIM training (as applicable).**
- **Cross reference training events and METL training objectives.**
- **Individual training.**

T1654 OCT 04/VGT-6

Ref: FM 7-1, p E-1, para E-2

REMOVE VGT-6

SHOW VGT-7, QTG TOPICS (CONT)

QTG TOPICS (CONT)

- **Leader development and training.**
- **Self development.**
- **Trainer and evaluator training.**
- **Training evaluation and feedback.**
- **Force integration.**
- **Resource guidance.**
- **Training management.**
- **Risk management.**

T1654 OCT 04/VGT-7

Ref: FM 7-1, p E-1, para E-2

REMOVE VGT-7

NOTE: Ensure students emphasize that normally commanders at separate company level and above publish training guidance. Ensure students refer to Appendix E for an example of QTG.

CHECK ON LEARNING: PE-1 serves as the check on learning for this lesson.

C. ENABLING LEARNING OBJECTIVE

ACTION:	Explain the quarterly training briefing process.
CONDITIONS:	As a first sergeant, in a classroom environment, given FM 7-1.
STANDARDS:	Explained the quarterly training briefing process IAW FM 7-1.

1. Learning Step / Activity 1. Identify the Training Briefing Process

Method of Instruction: Conference / Discussion
 Technique of Delivery: Small Group Instruction (SGI)
 Instructor to Student Ratio: 1:14
 Time of Instruction: 10 mins
 Media: VGT-8 thru VGT-11

The quarterly training briefing provides the next higher commander with the subordinate commander's training assessment and training strategy. The higher commander then reconciles scheduling or resource conflicts and approves the plan.

QUESTION: As a minimum, what topics should the quarterly training briefing cover?

ANSWER: See VGT-8 and VGT-9.

SHOW VGT-8, QTB TOPICS

QTB TOPICS

- Training that was planned and briefed at a previous QTB, but not conducted, and why.
- Organization's METL and assessment of proficiency levels.
- Unit's training focus and objectives for the upcoming training period.
- Organization's short range training calendar.
- Upcoming training events.
- Officer leader development programs with emphasis on warfighting skill development

T164 OCT 04/VGT-8

Ref: FM 7-1, p 4-69, Fig 4-40

REMOVE VGT-8

SHOW VGT-9, QTB TOPICS (CONT)

QTB TOPICS (CONT)

- Self development.
- Risk management.
- Plans for training trainers and evaluators.
- Force integration plans for the upcoming period.
- Resource allocation.

T1654 OCT 04/VGT-9

Ref: FM 7-1, p 4-69, Fig 4-40

NOTE: Ensure students briefly discuss each topic and the group discussion expands on the comparisons between active and reserve component briefings.

REMOVE VGT-9

The CSM and 1SG normally brief after their commanders. They provide an analysis of the unit's soldier training proficiency, proposed training and education plans.

QUESTION: What are the specific areas that CSMs and 1SGs normally brief?

ANSWER: See VGT-10 and VGT-11.

SHOW VGT-10, CSM/1SG AREAS

CSM/1SG AREAS

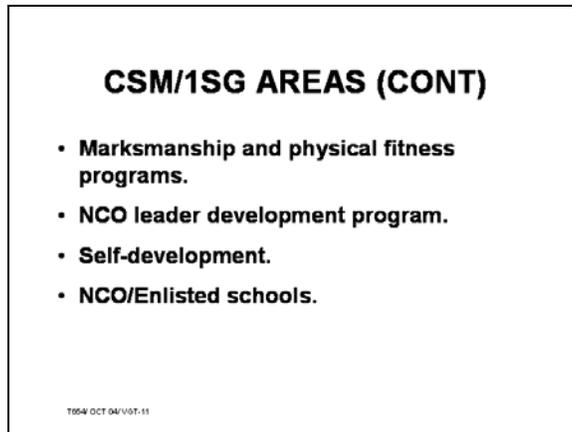
- **Individual training proficiency feedback received for previous short-range planning period.**
- **Assessment of individual training proficiency.**
- **Planned individual training events.**
- **METL-derived soldier tasks for next quarter to be integrated with collective mission essential tasks.**

T1654 OCT 04/VGT-10

Ref: FM 7-1, p 4-70, Fig 4-41

REMOVE VGT-10

SHOW VGT-11, CSM/1SG AREAS, CONT



Ref: FM 7-1, p 4-70, Fig 4-41

NOTE: Ensure students explain the scope of each area. Have them suggest possible sources for the information necessary to brief the area.

REMOVE VGT-11

BREAK: TIME: 00:50 to 01:00

01:00 to 02:50 continue LS/A 2, ELO C.

2. Learning Step / Activity 2. Conduct a Quarterly Training Briefing

Method of Instruction: Role Playing
Technique of Delivery: Small Group Instruction (SGI)
Instructor to Student Ratio: 1:14
Time of Instruction: 2 hrs
Media: PE-1

NOTE: Refer students to PE-1 (SH-4) and SH-3. Instruct the students that they will have 40 minutes to prepare to conduct a quarterly training brief and to use the information from T651, Train a Company Overview, to prepare their slides. **The facilitator will play the role of the BDE CDR and CSM.** Working together each team, (BN CDR, and CSM, CO CDR and 1SG), will use the data from the training meeting to complete SH-3. Students with the roles of BN S1 thru S3 will provide input for each team. Teams will have 10 minutes to transpose all gathered information on SH-3 (VGTs). Teams will conduct a 10-minute brief on their portion of the QTB (staff elements will not brief). This is also an opportunity to evaluate briefing techniques and discuss your observations with the group. Allow students a 10-minute break between the preparation and presentation of the briefing.

CHECK ON LEARNING: PE-1 serves as the check on learning for this lesson.

SECTION IV. SUMMARY

Method of Instruction: <u>Conference / Discussion</u>
Technique of Delivery: <u>Small Group Instruction (SGI)</u>
Instructor to Student Ratio is: <u>1:14</u>
Time of Instruction: <u>5 mins</u>
Media: <u>None</u>

Check on Learning

Practical Exercise 1 and the questions throughout the lesson serve as the check on learning for this lesson.

Review / Summarize Lesson

During the last three hours, we discussed Chapter 4 of FM 7-1, Planning. To conduct effective and meaningful training, you must first begin by thoughtfully and carefully executing the planning process.

Transition to Next Lesson

None

SECTION V. STUDENT EVALUATION

**Testing
Requirements**

NOTE: Describe how the student must demonstrate accomplishment of the TLO. Refer student to the Student Evaluation Plan.

You will receive a 40 question written examination that may include questions from this lesson. To receive a GO, you must answer at least 28 or more questions correctly.

**Feedback
Requirements**

NOTE: Feedback is essential to effective learning. Schedule and provide feedback on the evaluation and any information to help answer students' questions about the test. Provide remedial training as needed.

You will participate in an after action review (AAR) immediately following the examination for this particular lesson.

Terminal Learning Objective

VGT-1, Planning

PLANNING

- **Long-range planning.**
- **Short-range planning.**
- **Near-term planning (discussed in T655).**

T654/ OCT 04/ VGT-1

LONG-RANGE PLANNING

- **Training assessment.**
- **Commander's guidance.**
- **Time management.**
- **Planning calendars.**

T654/ OCT 04/VGT-2

TIME MANAGEMENT SYSTEM

The Three Cycle System:

- **Green Cycle (Prime-Time Training).**
- **Amber Cycle (Mission).**
- **Red Cycle (Support).**

T654/ OCT 04/ VGT-3

SHORT-RANGE PLANNING

- **Training Assessment.**
- **Training Strategy.**
- **Commander's Guidance.**
- **Training Plans.**

T654/ OCT 04/ VGT-4

RISK MANAGEMENT PRINCIPLES

- **Integrate risk management into training planning, preparation, and execution.**
- **Make risk decisions at the appropriate level in the chain of command.**
- **Accept no unnecessary risk.**

T654/ OCT 04/ VGT-5

QTG TOPICS

- **Commander's assessment of METL.**
- **Training priorities.**
- **Combined arms training.**
- **Organizational inspection program.**
- **JIIM training (as applicable).**
- **Cross reference training events and METL training objectives.**
- **Individual training.**

T654/ OCT 04/ VGT-6

QTG TOPICS (CONT)

- **Leader development and training.**
- **Self development.**
- **Trainer and evaluator training.**
- **Training evaluation and feedback.**
- **Force integration.**
- **Resource guidance.**
- **Training management.**
- **Risk management.**

T654/ OCT 04/ VGT-7

QTB TOPICS

- Training that was planned and briefed at a previous QTB, but not conducted, and why.
- Organization's METL and assessment of proficiency levels.
- Unit's training focus and objectives for the upcoming training period.
- Organization's short range training calendar.
- Upcoming training events.
- Officer leader development programs with emphasis on warfighting skill development

T654/ OCT 04/VGT-8

QTB TOPICS (CONT)

- **Self development.**
- **Risk management.**
- **Plans for training trainers and evaluators.**
- **Force integration plans for the upcoming period.**
- **Resource allocation.**

T654/ OCT 04/ VGT-9

CSM/1SG AREAS

- **Individual training proficiency feedback received for previous short-range planning period.**
- **Assessment of individual training proficiency.**
- **Planned individual training events.**
- **METL-derived soldier tasks for next quarter to be integrated with collective mission essential tasks.**

T654/ OCT 04/ VGT-10

CSM/1SG AREAS (CONT)

- **Marksmanship and physical fitness programs.**
- **NCO leader development program.**
- **Self-development.**
- **NCO/Enlisted schools.**

T654/ OCT 04/ VGT-11

Appendix B - Test(s) and Test Solution(s) (N/A)

PRACTICAL EXERCISE 1

Title	Conduct a Quarterly Training Briefing		
Lesson Number / Title	T654 version 1 / LONG-AND SHORT-RANGE PLANNING		
Introduction	This practical exercise will provide you the opportunity to develop and conduct a quarterly training briefing.		
Motivator	This practical exercise will provide insight on conducting a quarterly training briefing and the coordination it requires.		
Learning Step/Activity	<p>NOTE: The instructor should inform the students of the following Learning Step/Activity requirements. (ELO C. 2)</p> <p>At the completion of this lesson, you [the student] will:</p> <table border="1" data-bbox="391 753 1395 821"><tr><td>Action:</td><td>Conduct a quarterly training briefing.</td></tr></table>	Action:	Conduct a quarterly training briefing.
Action:	Conduct a quarterly training briefing.		
Safety Requirements	None		
Risk Assessment	Low		
Environmental Considerations	None		
Evaluation	You will determine how well the PE went during the post-PE discussion with the instructor.		
Instructional Lead-In	Completing this PE will provide you the opportunity to develop and participate in a quarterly training briefing.		
Resource Requirements	<p>Instructor Materials:</p> <p>None</p> <p>Student Materials:</p> <ul style="list-style-type: none">• PE-1.• SH-3 and SH-4.• Pen or pencil and writing paper.		
Special Instructions	The focus of this exercise is on <i>PROCESS, not content</i> . The presentation must illustrate the proper conduct of a quarterly training briefing. Initiative by participants will enhance the effectiveness of the presentation.		

Procedures**Requirement:**

1. Prepare for QTB (40 minutes, teams).
2. Conduct QTB (50 minutes, group).
3. Conduct discussion (10 minutes, facilitator-led).

Specific Instructions:

- a. The facilitator will assign one of the following roles for the QTB by the facilitator. You must familiarize yourself with FM 7-1, Appendix F, pages F-2 thru F-12 for the types of information usually briefed. Use this data and the VGTs in Student Handout 3 to prepare for your assigned role.
 1. BN CDR (REF: FM 7-1, pages F-2 thru F-12 and complete VGT-1 on page SH-3-2 and VGT-2 on page SH-3-3)
 2. BN CSM (Complete VGT-12 on page SH-3-13)
 3. Commander Co A (Complete VGT-3 on page SH-3-4 and VGT-4 on page SH-3-5)
 4. Commander Co B (Complete VGT-5 on page SH-3-6)
 5. Commander Co C (Complete VGT-6 on page SH-3-7)
 6. Commander Co D (Complete VGT-7 on page SH-3-8)
 7. 1SG Co A (Complete VGT-8 on page SH-3-9)
 8. 1SG Co B (Complete VGT-9 on page SH-3-10)
 9. 1SG Co C (Complete VGT-10 on page SH-3-11)
 10. 1SG Co D (Complete VGT-11 on page SH-3-12)
 11. BN S1
 12. BN S3
 13. BN S4
- b. You must generate any data you need to present your portion of the QTB. You may use any applicable information from T653, METL Development; T655, Company Training Meeting; and SH-3.
- c. Work on your role slides prior to the start of class.

**Feedback
Requirements**

Discussion with the instructor will serve as feedback for this PE.

**SOLUTION FOR
PRACTICAL EXERCISE 1**

There is no school solution for this PE. Discussion will be instructor led.

HANDOUTS FOR LESSON: T654 version 1

This appendix contains the items listed in this table--

Title/Synopsis	Pages
SH-1, Advance Sheet	SH-1-1
SH-2, Student Notes	SH-2-1 thru SH-2-5
SH-3, QTB Slides	SH-3-1 thru SH-3-13
SH-4, Practical Exercise 1	SH-4-1 thru SH-4-3

Student Handout 1

Advance Sheet

Lesson Hours

This lesson consists of three hours of small group instruction.

Overview

Planning links the unit METL and the execution of battle focused training. It is a centralized process that aligns training priorities with wartime requirements at all levels within the unit. Although there are other training requirements, battle focus allows the leader to narrow his scope of planning to wartime mission essential tasks. As a first sergeant, you assist the commander in conducting long- and short-range planning and participate in the quarterly training briefing (QTB).

Learning Objective

Terminal Learning Objective (TLO)

Action:	Explain the requirements for long-and short-range planning.
Condition:	As a first sergeant in a classroom environment, given FM 7-1.
Standard:	Explained the requirements for long-and short-range planning IAW FM 7-1.

- ELO 1** Explain the long-range planning process.
ELO 2 Explain the short-range planning process.
ELO 3 Explain the Quarterly Training Briefing process.
-

Assignment

The student assignments for this lesson are:

- Read FM 7-1, Chapter 4, and App E, F and H.
 - Read PE-1 and prepare slides for QTB role.
-

Additional Subject Area Resources

FM 7-0, Training the Force.

Bring to Class

You must bring the following materials to class:

- FM 7-1.
 - SH-2 thru SH-4.
 - PE-1 and homework slides for QTB role.
 - All reference material you have received.
 - Pen or pencil and writing paper.
-

Student Handout 2

Student Notes

This student handout contains four pages of **slides with student note space**.

PLANNING

- Long-range planning.
- Short-range planning.
- Near-term planning (discussed in T655).

T654 OCT 04/V07.1

LONG-RANGE PLANNING

- Training assessment.
- Commander's guidance.
- Time management.
- Planning calendars.

T654 OCT 04/V07.2

TIME MANAGEMENT SYSTEM

The Three Cycle System:

- Green Cycle (Prime-Time Training).
- Amber Cycle (Mission).
- Red Cycle (Support).

T654 OCT 04/V07.3

SHORT-RANGE PLANNING

- **Training Assessment.**
- **Training Strategy.**
- **Commander's Guidance.**
- **Training Plans.**

T854 OCT 04/V07.4

RISK MANAGEMENT PRINCIPLES

- **Integrate risk management into training planning, preparation, and execution.**
- **Make risk decisions at the appropriate level in the chain of command.**
- **Accept no unnecessary risk.**

T854 OCT 04/V07.5

QTG TOPICS

- **Commander's assessment of METL.**
- **Training priorities.**
- **Combined arms training.**
- **Organizational inspection program.**
- **JIIM training (as applicable).**
- **Cross reference training events and METL training objectives.**
- **Individual training.**

T854 OCT 04/V07.6

QTG TOPICS (CONT)

- **Leader development and training.**
- **Self development.**
- **Trainer and evaluator training.**
- **Training evaluation and feedback.**
- **Force integration.**
- **Resource guidance.**
- **Training management.**
- **Risk management.**

1954 OCT 04/V07.7

QTB TOPICS

- Training that was planned and briefed at a previous QTB, but not conducted, and why.
- Organization's METL and assessment of proficiency levels.
- Unit's training focus and objectives for the upcoming training period.
- Organization's short range training calendar.
- Upcoming training events.
- Officer leader development programs with emphasis on warfighting skill development

1954 OCT 04/V07.8

QTB TOPICS (CONT)

- **Self development.**
- **Risk management.**
- **Plans for training trainers and evaluators.**
- **Force integration plans for the upcoming period.**
- **Resource allocation.**

1954 OCT 04/V07.9

CSM/1SG AREAS

- Individual training proficiency feedback received for previous short-range planning period.
- Assessment of individual training proficiency.
- Planned individual training events.
- METL-derived soldier tasks for next quarter to be integrated with collective mission essential tasks.

T854 OCT 04/V07-10

CSM/1SG AREAS (CONT)

- Marksmanship and physical fitness programs.
- NCO leader development program.
- Self-development.
- NCO/Enlisted schools.

T854 OCT 04/V07-11

Student Handout 3

QTB Slides

This student handout contains 12 pages of slides for QTB presentation.

Student Handout 4

Practical Exercise-1

This student handout contains two pages of **Practical Exercise 1**.

Title Conduct a Quarterly Training Briefing

Introduction This practical exercise will provide you the opportunity to develop and conduct a quarterly training briefing.

Motivator This practical exercise will provide insight on conducting a quarterly training briefing and the coordination it requires.

Safety Requirements None

Risk Assessment Level Low

Environmental Consideration None

Evaluation You will determine how well the PE went during the post-PE discussion with the instructor.

Instructional Lead-in Completing this PE will provide you an opportunity to develop and participate in a quarterly training briefing.

Resource Requirements None

Special Instructions None

**General
Instructions**

The focus of this exercise is on *PROCESS, not content*. The presentation must illustrate the proper conduct of a quarterly training briefing. Initiative by participants will enhance the effectiveness of the presentation.

Requirement

1. Prepare for QTB (40 minutes, teams).
 2. Conduct QTB (50 minutes, group).
 3. Conduct discussion (10 minutes, facilitator-led).
-

**Specific
Instructions**

- a. The facilitator will assign each student one of the following roles for the QTB by the facilitator. You must familiarize yourself with FM 7-1, Appendix F, pages F-2 thru F-12 for the types of information usually briefed. Use this data and the VGTs in Student Handout 3 to prepare for your assigned role.
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