

INSCOM G-3 Training Intelligence Training and Readiness Support Services Instructor Certification Program

This document codifies the Training and Readiness Support Services (TRSS) Instructor Certification Program (ICP) in response to an initiative of the Undersecretary of Defense for Intelligence (USD(I)). It contains the certification requirements for each level of instructor certification; identifies the roles and responsibilities for implementing the program; and contains the forms necessary to apply for certification. This certification program is part of the larger TRSS Instructor Development Program (IDP) which is designed to advance the skills of all TRSS instructors.

1. References:
 - a. DoD Intelligence Community Instructor Certification Standard, issued by the USD(I) November 2, 2010
 - b. DIA Instruction Certification Concept of Operations
 - c. NGA Instructor Training Course
2. Purpose: To ensure that all TRSS training is conducted by fully competent, capable, and knowledgeable learning facilitators, the TRSS Program Management Office (PMO) has implemented an ICP. This program provides a framework for all instructors to maximize their potential by achieving progressively higher levels of certification. This Concept of Operations (CONOPS) establishes the purpose, process, procedures, and specific responsibilities associated with the program.
3. Applicability/Scope: This CONOPS applies to all TRSS task orders and their respective instructors, to include full-time, part-time, and adjunct instructors. All instructors must be certified or in the active process of becoming certified.
4. Definitions: Terms are generally defined as they are used throughout the CONOPS.
5. Organizational Roles and Responsibilities:
 - a. The Quality Assurance Manager (QAM) will:
 - 1) In coordination with the Training Manager (TM) revise, as necessary:
 - a) The criteria for Instructor, Senior Instructor (SI), and Master Instructor (MI) certifications.
 - b) The standards and methods for assessing instructor performance in facilitating learning.
 - 2) Ensure that training courses and development activities required for certification are developed and that sessions are scheduled to meet requirements.

- 3) Review and validate certification packages and grant TRSS instructor certification.
 - 4) Respond to the USD(I) Chief Learning Officer data calls for information concerning instructor certification, course offerings, curriculum development, and schoolhouse accreditation.
 - 5) Align TRSS instructor certification efforts with applicable DoD and/or Office of the Director of National Intelligence (ODNI) National Intelligence University (NIU) standards.
- b. The TRSS Task Order Leads (TOLs) will:
- 1) Institute a schedule for assessing instructor classroom performance.
 - 2) Assess instructors using criteria established by the TRSS QAM.
 - 3) Institute instructor mentoring procedures.
 - 4) Establish procedures for tracking hours facilitating learning, instructor development activities, and instructor assessments.
 - 5) Establish procedures for the Supervisors/Course Managers (CMs) and to validate their instructor's' applications for certification, waivers, equivalencies, and grandfathering.
 - 6) Submit to the TRSS QAM the names of candidates who have met the criteria for instructor certification, along with documentation showing completion of the certification requirements.
 - 7) Ensure that TRSS-certified instructors meet ongoing program requirements for maintaining certification.
- c. The TRSS Training Administrator (TA) will create a repository and establish procedures for recording the certification levels of the TRSS instructors.
- d. The TRSS Faculty Development Board (FDB) consists of the TRSS Program Manager (PM), TM, and QAM. The FDB will:
- 1) Arbitrate appeals submitted by instructors whose application for certification, grandfathering, or equivalency is disapproved.
 - 2) Approve proposed changes to:
 - a) The criteria for Instructor, SI, and MI certifications.
 - b) The standards and methods for assessing instructor performance in facilitating learning.

6. Instructor Certification Requirements: The TRSS Instructor Certification Program (ICP) has three certification levels, Instructor, SI, and MI. The requirements for each are as follows:

a. The first level, called "Instructor," is required under the referenced document (see paragraph 1), and the following meets the basic requirements:

- 1) Subject Matter Expertise – Instructor candidates must possess knowledge and expertise sufficient to instruct the course content. The CM will have the responsibility for verifying the candidate's subject matter expertise.
- 2) Content proficiency – The instructor candidates must demonstrate content proficiency, as verified by the CM and TOL. It is recommended that an instructor candidate seek an instructor mentor.
- 3) Instructor qualifications – Instructors must demonstrate, at a minimum, the basic instructor competencies (knowledge, skills, and attitudes) stipulated by the USD(I):
 - (a) Knowledge of adult learning principles.
 - (b) Knowledge of the Instructional Systems Design (ISD) process.
 - (c) Knowledge of basic course/curriculum evaluation.
 - (d) Face-to-face presentation skills to include integration with appropriate teaching methods.
 - (e) Basic facilitation skills.
 - (f) Basic classroom management skills.
 - (g) Basic assessment of student learning skills and skills in the delivery of adequate feedback.
 - (h) Awareness of learning transfer.
 - (i) Knowledge of distance learning and delivery mechanisms.

These requirements can be met through successful completion of the TRSS Instructor Training Course (ITC). Candidates who have taken equivalent courses or have extensive hands-on experience may apply to the TRSS FDB for a waiver from the TRSS ITC using the form in Appendix A.

- 4) Professional Conduct – Instructors must read and agree to abide by the Professional Code of Conduct for TRSS Instructors (Appendix B).

- 5) Supervised Instruction – The instructor candidates must facilitate a course, block, or module in accordance with the course documentation to meet the learning objectives, and be observed facilitating learning by the course manager or an experienced instructor. See Section 7g for the definition of "facilitating learning." It is recommended that the observer use the Instructor Assessment Form (Appendix C).
 - 6) Certification Assessment – Having met all the criteria listed above, an instructor candidate will receive a summative (formal) assessment by a Supervisor/CM, TOL or designated authority (hereafter referred to as "the assessor") as the final step for Instructor certification. The assessment will be conducted for a minimum of two modules or blocks of instruction using the Instructor Assessment Form (Summative) (Appendix C) or similar form. The instructor must receive at least an overall "satisfactory" rating in each module in order to be certified.
 - (a) In preparation for the observation, instructors should review the feedback forms to ensure that lessons include opportunities to demonstrate as many skills as possible. The assessor will meet with the instructor to discuss any questions on the criteria by which he/she will be assessed.
 - (b) If the instructor does not achieve an overall satisfactory rating, the assessor and instructor will jointly develop an improvement plan.
 - (c) After completing the improvement plan, the instructor will be assessed again.
 - 7) Submission of Certification Package – Instructor candidates must submit to their supervisor/Course Manager proof of successful completion of TRSS ITC (in the form of a copy of the TRSS ITC certificate, or an approved waiver), a copy of the summative assessment demonstrating an overall rating of satisfactory or higher in each of the modules assessed, together with the Instructor Record Tracking Log (Appendix D).
 - 8) Time Frame – A new instructor is expected to achieve Instructor Certification within six months of filling an instructor billet, with extensions permitted by the supervisor/Course Manager for extenuating circumstances.
- b. The second level in the TRSS ICP is called "Senior Instructor." Any certified Instructor is eligible to pursue SI certification. However, it is not required that a TRSS instructor achieve certification beyond the first level.
- 1) Additional Training – Instructors pursuing senior level certification must complete the TRSS ISD course and should seek additional professional development in online facilitation, online learning technologies, and other non-traditional training techniques. Candidates who have completed an equivalent ISD course, possess an education degree, or have extensive professional experience designing and developing learning may submit a request for waiver from the ISD course to the TRSS FDB (Appendix A).

- 2) Maintain Subject Matter Expertise – SI candidates must demonstrate current technical expertise relevant to the course(s) as set by the PM or CM, to ensure that the instructor can serve as a credible technical facilitator, authority, and resource.

- 3) Professional Development – SI candidates must complete 40 hours of relevant professional development annually. Completion of the ISD course counts toward this requirement. Professional development hours should be obtained in different topic areas (per the below list), with no more than 20 percent allotted to the Other Professional Development area. Supervisors/CMs, in collaboration with individual instructors, should select activities in all three topic areas to meet the development needs of each instructor.
 - (a) Subject Matter Expertise/Technical Expertise
 - (b) Training, Instruction, Facilitation
 - (1) Knowledge of adult learning principles.
 - (2) Knowledge of the ISD process.
 - (3) Knowledge of basic course/curriculum evaluation.
 - (4) Face-to-face presentation skills to include integration with appropriate teaching methods.
 - (5) Basic facilitation skills.
 - (6) Basic classroom management skills.
 - (7) Basic assessment of student learning skills and skills in the delivery of adequate feedback.
 - (8) Awareness of learning transfer.
 - (9) Knowledge of distance learning and delivery mechanisms.
 - (c) Other Professional Development in areas such as acquisition, financial management, and management/leadership development

The requirement for professional development may be fulfilled through different activities - formal education, professional activities, and self-directed learning. It is recommended that not more than 20 percent of annual professional development be gained from self directed learning, subject to change at the discretion of Supervisors/CMs.

- (a) Formal Education – Participation as an attendee in seminars, courses, or TRSS-sponsored or external conferences, symposia, workshops or other learning events.

- (b) Professional Activities – Participation as speaker or co-speaker at a conference, seminar, course, or TRSS-sponsored or external conferences, symposia, workshops; site visits to other agencies or organizations applying the concepts taught by the instructor; and authoring professional articles, papers, and texts.

- (c) Self-Directed Learning – Reading articles, books; watching videos, using interactive CD-ROMs; formal discussion with colleagues; receiving mentoring and coaching from colleagues.
- 4). Formative Assessments – SI candidates must have two formative (informal) assessments by an SI or MI. Instructors will be assessed using the Instructor Assessment Form (Formative) (Appendix C).
- 5) Summative Assessments – SI candidates must have a minimum of one summative (formal) assessment to demonstrate their technical and instructional skills in a minimum of two modules or blocks of instruction. Instructors must receive at least an overall "satisfactory" rating in each module/block. Instructors will be assessed against the Instructor Assessment Form (Summative) (Appendix C).
 - (a) In preparation for the assessment, instructors should review the feedback forms to ensure that the modules selected include opportunities to demonstrate as many skills as possible. The assessor will meet with the instructor to discuss any questions regarding the criteria by which he/she will be assessed.
 - (b) If the instructor does not achieve an overall satisfactory rating, the assessor and instructor will jointly develop an improvement plan.
 - (c) After completing the improvement plan, the instructor will be assessed again.
- 6) Peer Assessment – Instructors who seek higher levels of certification are expected to help other instructors advance their skills. Therefore, the SI candidate must perform a formative (informal) assessment of at least one instructor, any level, using the Instructor Feedback (formative) form. The instructor should share the findings with the observed instructor using the feedback form. The instructor candidate should retain a copy of the feedback form for inclusion in the tracking log.
- 7) Experience Facilitating Learning – Instructors must facilitate learning for a minimum of 600 hours at TRSS or as a TRSS representative at another IC member organization before they can qualify for SI. Note that up to 20 percent (120 hours) of this time can be accumulated through design and development of learning content.
 - (a) The following activities qualify toward the facilitating learning requirement:
 - (1) Delivery of lessons in the classroom or online, or facilitation of group exercise(s), classroom discussions, role-plays, case studies, simulation or gaming exercises, and field exercises.
 - (2) Interacting with students online to reinforce and advance learning.
 - (3) Observing exercises to reinforce and advance learning.
 - (4) Floor support, desk side support, and "after training" support that reinforces and advances learning.
 - (5) Design and development of learning content.
 - (b) The following activities cannot be counted toward this requirement:

- (1) Time spent initially observing a class to learn to teach it.
 - (2) Passive time spent in a classroom (e.g. while another instructor/guest speaker is presenting).
 - (3) Administrative time, such as handling course logistics, production of course materials, etc.
 - (4) Interacting with students on purely administrative matters.
- (c) Instructors are responsible for tracking the hours they spend facilitating learning, using the Senior Instructor Record Tracking Log (Appendix E).
- 8) Mentoring – As instructors seek higher levels of certification, they must contribute to the profession by mentoring at least one colleague. To fulfill this requirement, an SI candidate may mentor an instructor at any level and in any division or an instructional systems designer who needs to learn a course/subject area in which the candidate is knowledgeable.
- (a) The types of activities that can fulfill the mentoring requirement include the following (note that this list is not meant to be all inclusive):
- (1) Helping a new instructor qualify to teach a course.
 - (2) Observing an instructor or guest speaker facilitating learning and providing constructive feedback using the Instructor Feedback (Formative) form.
 - (3) Helping a new instructor or instructional designer acculturate to TRSS or understand the technical content area.
 - (4) Coaching a peer instructor to expand his/her repertoire of facilitation skills.
 - (5) Participating in the formal TRSS Mentoring Program, when the mentee is another learning/human capital professional.
 - (6) Participating in an after action review or course review that includes providing constructive feedback for the purposes of improving the instruction.
- (b) The mentoring relationship should be sustained and include formal meetings (including observation sessions). "Formal" means that the meeting is scheduled in advance, and topics for discussion agreed, at least at a general level. Informal conversations may also be considered mentoring but the requirement of formal meetings is to ensure that short, ad hoc conversations are not construed to mean that mentoring or coaching has taken place.
- 9) Submission of Certification Package – SI candidates must submit to their Supervisors/CMs the Senior Instructor Record Tracking Log (Appendix E), along with a copy of successful completion of the ISD course, or a waiver (Appendix A).
- 10) Time Frame – There is no time limit for an instructor to advance from Instructor to SI status.

- c. The third level in the TRSS Certification Program is called "Master Instructor." Any certified SI is eligible to pursue an MI certification. However, it is not required that a TRSS instructor achieve certification beyond the Instructor level.
- 1) Maintain Subject Matter Expertise – MI candidates must demonstrate current technical expertise relevant to the course(s) as set by the CM or TOL to ensure that the instructor can serve as a credible technical facilitator, authority, and resource.
 - 2) Professional Development – MI candidates must complete 40 hours of relevant professional development annually. See Section 6.b.3 for the activities and topic areas that can fulfill the professional development requirement.
 - 3) Formative Assessment – MI candidates must have two formative (informal) assessments by a Supervisor, CM, or designated authority. Instructors will be assessed using the Instructor Feedback (Formative) form (Appendix C) or similar form.
 - 4) Summative Assessment – MI candidates must have a minimum of one summative (formal) assessment to demonstrate their technical and instructional skills in a minimum of two modules or blocks of instruction. Instructors must receive at least a "satisfactory" rating in each module/block. Instructors will be assessed against the Instructor Assessment Form (Summative) (Appendix C) or similar form. In preparation for the observation, the assessor will meet with the instructor to discuss any questions regarding the criteria by which he/she will be assessed. If, in the opinion of the assessor, the instructor needs to demonstrate a better grasp and effective application of the skills required, an improvement plan will be developed jointly. After completing the plan, the instructor will be assessed again.
 - 5) Peer Assessment – Instructors who seek higher levels of certification are expected to help other instructors advance their skills. Therefore, the MI candidate must perform at least one formative (informal) assessment of an SI or MI. The instructor candidate should share the findings with the observed instructor, using the feedback form. The instructor candidate should retain a copy of the feedback form for inclusion in the tracking log. The assessment may occur in different TRSS training organizations.
 - 6) Experience Facilitating Learning – SIs must complete a minimum of 1200 additional hours facilitating learning at TRSS or as a TRSS representative at another IC member organization before they can qualify for MI. Note that up to 20 percent (240 hours) of this time can be accumulated through design and development of learning content. Refer to the SI Section 6.8 for a list of activities that count toward this requirement.

- 7) Mentoring – MI candidates must mentor one instructor, any level, at a minimum. Refer to the SI Section 7h for a list of activities that can fulfill this requirement.
 - 8) Submission of Certification Package – MI candidates must submit to their supervisor/Course Manager the Master Instructor Record Tracking Log (Appendix F).
 - 9) Time Frame – There is no time limit for an instructor to advance from an SI to an MI status.
7. Certification Process: The following outlines the approval process for certification:
- a. The instructor submits his/her certification package in the form of the Record Tracking Log, to the Supervisor/CM.
 - b. The Supervisor/CM reviews the package for thoroughness and soundness.
 - 1) If the Supervisor/CM and TOL agree that the instructor has met the requirements for the certification level sought, he/she signs the Record Tracking log and submits it to the TRSS FDB.
 - 2) If the Supervisor/CM concludes that the instructor has not met the requirement, they must identify for the instructor what corrections or additional work is needed.
 - c. The TRSS FDB conducts a final check for completion, grants the TRSS certification, records the names of certified instructors, and submits the names of certified instructors to the USD(I) as required to satisfy annual data calls.
8. Appeals Process: If an instructor’s application for certification, grandfathering, or equivalency is disapproved, the entity responsible for the disapproval will provide a justification in writing. The instructor may submit a written appeal to the TRSS FDB, along with the full documentation required for the certification. *The QAM will present all appeals, along with the full packages, to the FDB for final decision.* The FDB will use a simple majority vote to decide on the appeals.
9. Recertification:
- a. TRSS instructors must recertify annually at their current level by completing the following requirements:
 - 1) Complete at least 40 hours of relevant professional development. Instructors should document these hours using a record tracking log and retain a copy of the log.
 - 2) Continually be assessed using the formative and summative assessment forms, with at least one summative assessment per year. Instructors should retain copies of these assessments.

- 3) Provide evidence of certification maintenance to the Supervisor/CM, upon request.
 - b. If an instructor fails to meet these requirements, or receives a summative assessment with an overall rating less than satisfactory, their certification will become inactive. In order to reactivate a certification, the instructor must complete the above-mentioned requirements.
 - c. The TRSS FDB will issue quarterly data calls to the CMs requesting the names of all instructors who have been recertified within a specific time frame (likely within the previous quarter).
 - d. If an instructor's certification lapses for a period of more than two years (regardless of cause), the instructor will be required to take an advanced presentation skills course or, at the discretion of the Supervisor/CM, the TRSS ITC in addition to the other certification requirements.
10. Waiver of requirements. Instructor certification candidates may request waivers for the TRSS ITC and the ISD Courses if they have completed an education degree within five years of entry into the TRSS instructor cadre or if they have taken an equivalent training course elsewhere within the last five years. In order to do so, they must complete the waiver request (Appendix A) and submit it to their Supervisor/CM.
11. Grandfathering. TRSS instructors who were certified under another IC or Service Training and Education program may seek to be granted the equivalent certification level under this TRSS instructor certification program. TRSS instructors who seek grandfathering into the new certification program must complete the process outlined below.
 - a. Application Process for Grandfathering. In order to be considered for certification under the grandfathering provision, an applicant must:
 - 1) Read and agree to abide by the Professional Code of Conduct for TRSS Instructors (Appendix B).
 - 2) Complete and sign the Application for Grandfathering Certification (Appendix G).
 - 3) Provide a copy of the instructor certification (or applicable documentation) under a previous program or, if that is not available, submit a current resume. When providing a resume, include the following information:
 - a) Contact information: name, address, telephonic number, e-mail address
 - b) Education (school, degree(s), if obtained, years attended)
 - c) Special training/courses/certificates (where obtained and dates obtained)
 - d) Teaching employment history with dates of employment
 - (1) List in chronological order
 - (2) Include most important courses taught

- (3) Include estimated hours spent teaching each course
 - (4) Include training/courses designed and taught by the candidate
 - e) Professional affiliations, including any officer positions held
 - f) Names and dates of publications authored/co-authored by the candidate
 - g) Presentations given within the last 10 years at conferences, conventions, and/or other agencies
 - h) Special skills or qualifications
 - i) Awards or special recognitions received
- b. The instructor should submit his/her application for grandfathering and resume (if needed) to the Supervisor/CM for submission to the TRSS FDB.
 - c. Instructors who are granted certification through the grandfathering provision will be required to meet ongoing TRSS recertification requirements to maintain certification as outlined in Section 9. These ongoing requirements include professional development, mentoring, and receiving formative and summative assessments.

12. Equivalency:

- a. Equivalency is intended for instructors who were certified by another member of the IC or one of the military services. Instructors who held, or currently hold, an active certification from one of these organizations prior to coming to TRSS can apply for equivalency. "Active certification" refers to certifications granted, recertified, or otherwise maintained within two years prior to coming to TRSS. Instructors must submit to their Supervisor/CM proof of their certification, such as a copy of an actual certificate or a printout of a personnel record that includes the certification, along with the request for equivalency (Appendix H). They must read and agree to abide by the Professional Code of Conduct for TRSS Instructors (Appendix B).
- b. Equivalency will be granted on a case-by-case basis. The Supervisor/CM will review the request for equivalency and make one of the following recommendations:
 - 1) Grant the applicant a TRSS instructor certification at the equivalent level, or
 - 2) Grant the applicant a TRSS instructor certification at a lower level, or
 - 3) Not grant the applicant a TRSS instructor certification.
- c. The TOL will submit their recommendation to the TRSS FDB for final validation. If the TRSS FDB disagrees with the recommendation, the QAM will discuss with the TOL before making a final recommendation.
- d. TRSS will recognize the Basic DoD Instructor Certification achieved at another DoD IC member organization. A DoD certified Basic Instructor who has accumulated hours toward higher certification levels at another member organization may apply to have those hours counted, if supporting documentation can be provided. These requests will be handled on a case-by-case basis as part of the equivalency process.

APPENDIX A: WAIVER REQUEST

MEMORANDUM

TO: TRAINING READINESS SUPPORT SERVICES FACULTY DEVELOPMENT BOARD

SUBJECT: Recommendation for Waiver from the Training Readiness Support Services Training

DATE: [Click here to enter a date.](#)

1. I, [Click here to enter text.](#), recommend that the following individual(s) be waived from the courses(s) selected in Section 2 below.
 - a. [Click here to enter text.](#)
 - b. [Click here to enter text.](#)

2. I, [Click here to enter text.](#), recommend that the above individual(s) be waived form the following course(s). Check all that apply:
 - a. Training Readiness Support Services Training Course
 - b. Training Readiness Support Services Instructional Systems Design Course

3. The justification for this waiver is based on the following:
 - a. [Click here to enter text.](#)
 - b. [Click here to enter text.](#)

4. Please find attached/enclosed the documentation supporting this waiver justification.

5. If there are any questions concerning this matter, please direct them to the undersigned.

[Click here to enter text.](#)

[Click here to enter text.](#) Task Order Lead

ENDORSEMENT:

In accordance with the Training Readiness Support Services Certification CONOPS, this waiver is : Approved or Disapproved

[Click here to enter text.](#)

Quality Assurance Manager
Training Readiness Support Services

**APPENDIX B: PROFESSIONAL CODE OF CONDUCT FOR
TRSS INSTRUCTORS**

PROFESSIONAL CODE OF CONDUCT FOR TRAINING READINESS SUPPORT SERVICES INSTRUCTORS

This document is an appendix to the TRSS Instructor Certification Program dated 4 April 2012.

Professional Code of Conduct for TRSS Instructors

- The following list is the Professional Code of Conduct set for by Training Readiness Support Services:
- Truthfully and appropriately represent subject matter, curriculum, organization, and self at all times.
- Instruct subjects consistent with the lesson plans and published objectives. Enhance the formal instruction with relevant personal and professional experiences.
- Objectively evaluate students' performance and provide feedback respectfully.
- Foster a learning environment conducive to the free exchange of ideas.
- Demonstrate respect for diverse backgrounds and viewpoints.
- Avoid allowing personal bias (your own or another student's) to limit the free exchange of ideas.
- Acknowledge that differences of opinion are a natural part of the learning environment. If conflict occurs, work to reduce it in a way that maintains the dignity of all participants.
- Comply with all applicable laws, policies, and regulations.

APPENDIX C: INSTRUCTOR EVALUATION FORM

TRSS INSTRUCTOR ASSESSMENT FORM		Date	Feedback provided by:	Instructor Name: Current Rating: <input type="checkbox"/> Instructor <input type="checkbox"/> Senior <input type="checkbox"/> Master															
Start Time	Stop Time	Type of Assessment: <input type="checkbox"/> Informal Lecture <input type="checkbox"/> Demonstration/Performance (DP) <input type="checkbox"/> Guided Discussion (GD/Case Study (CS)) <input type="checkbox"/> Mixed Method																	
Course Title:		Lesson Title:																	
Instructor's Supervisor/ Task Order Lead	Lesson Objectives:																		
Strengths																			
Areas for Improvement																			
Summative Rating																			
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	Excellent																		
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	Needs Improvement																		
	Unacceptable																		
Signature of Instructor		Signature of Assessor		Signature of Supervisor/Task Order Lead/QAM															

INTRODUCTION				
Unacceptable	Needs Improvement	Successful	Excellent	Outstanding
Attention				
<p>Omitted; vague; inappropriate; little or no attempt to focus on topic</p>	<p>Gained attention of students; focused on topic</p>		<p>Compelling; moving; creative. Strongly aroused student attention to topic</p>	
Motivation				
<p>Omitted; did not establish need; inappropriate; negative; unclear; read; mechanical</p>	<p>Established a need for students to listen</p>		<p>Stimulating; enhanced desire to listen; personalized to the students needs</p>	
Overview				
<p>Omitted; vague; confusing; difficult to determine what/how material would be covered; students not aware of expectations; mechanical; failed to explain topics/terms; little effort to establish permissive atmosphere</p>	<p>Identified main points; clear organization; explained students role and how lesson will be conducted; defined terms and established permissive atmosphere as required</p>		<p>Thematically introduced main points and select sub-points; referenced relationship to lesson objectives; clear roadmap provided that explained the logic and sequence of the lesson and its relationship with the overall block/course</p>	
BODY				
Unacceptable	Needs Improvement	Successful	Excellent	Outstanding
Organization				
<p>Organization pattern chosen fails to adequately frame the lesson; little to no logic between points and objectives; lesson taught in a manner inconsistent with the POI</p>	<p>Logical relationship between lesson objective and main points; between main points and sub-points; instruction paralleled logic, teaching method, and sequencing reflected in the structured outline of objectives and/or the POI</p>		<p>Organizational pattern mirrors the structured outline of objectives and/or the POI; ideally frames the lesson and facilitates learning; sub-points, main-points, and objectives superbly aligned</p>	
Support				
<p>Omitted; insufficient or misleading proof/clarification support; assumptions stated as fact; did not define terms when needed; material did not or was inadequate to support the lesson objective; support inconsistent with the POI</p>	<p>Provided proof support by citing sources/ experience/statistics/testimony; provided clarification support by using relevant examples/explanations/definitions/ comparisons; support aligned with the structured outline of objectives and/or the POI</p>		<p>Excellent variety of proof and clarification; clearly explained ideas and supported sub-points, main-points and lesson objectives; used personal examples and student examples to augment that available in the structured outline of objectives and/or the POI greatly reinforcing comprehension and retention</p>	
Question/Response				
<p>Too few/many questions used; most questions phrased as dead end or knowledge level; ignored or responded superficially/negatively to student responses; failed to act upon verbal/non-verbal signs provided by students in efforts to understand lesson</p>	<p>Asked planned questions that supported the main and sub-points; most phrased as a level consistent with the lesson objective; responded effectively to most student's questions/inputs</p>		<p>Strongly reinforced understanding with planned and spontaneous questions; always phrased consistent with the level of learning; solicited in-depth responses; effectively addressed areas of confusion; anticipated student questions; used a positive manner to ensure all students understood before moving on</p>	
Transitions				
<p>Missing; stilted; most external transitions failed to relate main ideas to previous point/idea and/or lesson objective; internal transitions failed to show a connection between ideas</p>	<p>Most external transition related main ideas to previous point/idea and lesson objective; internal transitions showed a connection between ideas</p>		<p>All external transitions related main ideas to previous point/idea and lesson objective; a; transitions showed an exceptionally smooth flow between ideas; interim summaries used to facilitate learning</p>	
CONCLUSION				
Unacceptable	Needs Improvement	Successful	Excellent	Outstanding
Summary				
<p>Incomplete; too brief; unclear what students should remember</p>	<p>Reviewed main points; developed relationships between main points; drew conclusions between main points and lesson objective</p>		<p>Fully integrated major ideas into holistic generalization; synthesized ideas into statements capturing essence of lesson while reinforcing all lesson objectives</p>	
Remotivation				
<p>Lacking; read or presented in a rigid/formal manner; too brief; little or no attempt to show how students can use information</p>	<p>Reminded students how they could use the information presented</p>		<p>Stimulating; identified a variety of potential uses of the material; enthusiastic; encouraging; activated student desire to use information</p>	

CONCLUSION (cont'd)				
Unacceptable	Needs Improvement	Successful	Excellent	Outstanding
Closure				
Omitted or abrupt; students left hanging; unsure lesson was over	Left students with a sense of completion		Dynamic; creative; left students with a positive sense of completion	
Attainment of Lesson Objective				
Lesson objectives not taught or not taught to the proper level; proficiency and/or attainment uncertain at best	Lesson objectives taught to the proper level and students generally judges to have attained the objective within the context taught		Objective properly taught and consistently reinforced throughout the lesson; students clearly learned what was required to a level consistent w/the structured outline of objectives and/or the POI	
SUPPORT ACTIVITIES				
Unacceptable	Needs Improvement	Successful	Excellent	Outstanding
Classroom Management				
Ignored or overcontrolled; inappropriate student participation (too little or too much); failed to manage time effectively (too fast or too slow); inadequate to fully develop all elements of the lesson	Maintained permissive atmosphere while remaining focused on objective; lesson adequately paced for time available and aligned to the structured outline of objectives and/or the POI		Great flexibility in controlling the lesson; ideal use of time available; maximum learning experience; all lesson elements developed in-depth	
Audio Visual and Instructional Materials				
Detracted from lesson; did nothing to help clarify or reinforce ideas; inappropriate; cluttered; difficult to read; poor integration into lessons; failed to integrate critical instructional materials noted in the POI	Clarified/support ideas as required; easy to read; integrated into lesson as appropriate; used all materials available in the POI		Visually stimulating; engaging; great variety and quality; extremely creative; well integrated throughout lesson to maximize retention and learning	
DELIVERY SKILLS				
Unacceptable	Needs Improvement	Successful	Excellent	Outstanding
Eye Contact				
Looked down or ignored students; not evenly distributed; partial to one section of the audience; read too much; dazed; impersonal	Generally direct, impartial and evenly distributed; created a "connection" with all students		Strong "eye to eye" connection with all students; varied; sincere; used eyes to reinforce, maintain attention and affirm student inputs; stayed "in touch" throughout	
Movement				
Too rigid; restricted; awkward; unnatural; excessive; distracting; mechanical	Primarily natural, smooth and coordinated with dialogue		Powerful; reinforcing; very smooth; integrated with content; facilitated flow of lesson and ideas	
Gestures				
Nonexistent or inappropriate; poorly timed; unnatural; excessive; restricted; distracting; mechanical	Typically natural and well-timed, smooth and purposeful		Powerful; emphatic; natural; very smooth; facilitated attention and control; strongly reinforcing; expressive	
Poise, Facial Expressions, and Appearance				
Deadpan; grim or inappropriately serious; non-expressive, rigid, or dull; insincere; lacked variety of expression; frightened or nervous; tolerated or encouraged inappropriate comments or behaviors; appearance detracted from lesson	Usually varied with mood and content; sincere; showed concern and/or interest; reinforced and expressed pleasure; appropriately animated to support ideas; dress and appearance consistent with school standards; professional atmosphere maintained		Strongly facilitated purpose and intent; well integrated into total delivery scheme to create a dynamic presentation; dress and appearance set the example; used poise to enhance learning	
Use of Voice				
Monotone; forced; quivering; too soft or too loud; too fast or too slow; poor word choice/pronunciation of words; poor grammar; lacked variety in expression; extensive verbal pauses; distracting and repetitive pauses; excessive use of acronyms; spoke too quickly or slowly	Primarily natural and appropriately varied in volume, rate, pitch and emphasis; indicated sincerity and enthusiasm; expressive; used proper grammar with no distracting verbalizations		Captivating; inspirational; extremely expressive and moving; varied perfectly to the occasion; fluent; dynamic; enthusiastic	

APPENDIX D: INSTRUCTOR RECORD TRACKING LOG

INSTRUCTIONS:

Instructor(s): Please complete and submit this form as part of your application package to your Supervisor/Course Manager.

Supervisor/Course Manager: Upon validation, please provide the package to your Task Order Lead.

Task Order Lead: Upon validation, please provide the package to the Quality Assurance Manager.

INSTRUCTOR INFORMATION

Please complete the following:

Name:

Date:

Task Order/Functional Area Name:

Office Mailing Address:

Mentor (optional):

City, State and Zip:

Office Phone No.:

Secure Phone No.:

INSTRUCTOR QUALIFICATIONS

Document the completion date for Instructor Training Course (ITC) or waiver for an equivalent course (required). If desired, document courses taken to develop the minimum instructor qualifications. Continue adding rows to the table or on another page if needed.

Course Name	Date(s) Completed	No. of Hours

SUPERVISED INSTRUCTION

Instructor candidates must facilitate a course, block, or module in accordance with the course documentation to meet the learning objectives, and be observed facilitating learning by the course manager or an experienced instructor. List the specific dates, course/modules/blocks of instructions, and name(s) of the senior/master instructor or Course Manager who observed you facilitating. *Completed feedback forms must be attached.*

Date	Course/Module/Block of Instruction	Observer/Assessor

CODE OF CONDUCT

I have reviewed the Training Readiness Support Services Instructor Code of Conduct.

I agree to abide by the Code of Conduct

REQUIRED SIGNATURES:

Instructor

I have completed the necessary requirements for TRSS Instructor certification.

Date:

Printed Name:

Signature: _____

Supervisor/Course Manager

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Task Order Lead

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Attached Documentation Checklist:

- Waiver for TRSS Instructor Training Course (SGICC)
- Completed feedback forms

For Quality Assurance Manager Use Only

Date: [Click here to enter a date.](#)

Documentation attached:

- Yes
- No

Application signed:

- Yes
- No

In accordance with the Training Readiness Support Services Instructor Certification Plan, this application is:

- Approved
- Disapproved

Quality Assurance Manager Signature and Date:

[Click here to enter text.](#)

Quality Assurance Manager
Training Readiness Support Services

**APPENDIX E: SENIOR INSTRUCTOR RECORD TRACKING
LOG**

INSTRUCTIONS:

Instructor(s): Please complete and submit this form as part of your application package to your Supervisor/Course Manager.

Supervisor/Course Manager: Upon validation, please provide the package to your Task Order Lead.

Task Order Lead: Upon validation, please provide the package to the Quality Assurance Manager.

INSTRUCTOR INFORMATION

Please complete the following:

Name:

Date of Submission:

Task Order/Functional Area Name:

Office Mailing Address:

Mentor (optional):

City, State and Zip:

Office Phone No.:

Secure Phone No.:

PROFESSIONAL DEVELOPMENT

Senior Instructor candidates must complete 40 hours of relevant professional development annually. With your initial application for Senior, you must show completion of an Instructional Systems Design (ISD) course or a waiver for a similar course. The ISD course counts toward this requirement. See the TRSS Instructor Certification Plan for a list of additional activities that can fulfill the Professional Development requirement.

Topic Area (Technical Facilitation, Other)	Activity (Formal Education, Professional Development, Self Directed)	Description	Date(s) Completed	# of Hours
Total # of Hours				

ASSESSMENTS

To qualify for Senior-level certification, you must show two formative assessments and one summative assessment. List the specific dates, course/modules/blocks of instructions, and name(s) of the Senior/Master instructor or supervisor/Task Order Lead who observed you facilitating. Completed feedback forms must be attached.

Date	Course/Module/Block of Instruction	Observer/Assessor

EXPERIENCE FACILITATING LEARNING

To qualify for Senior-level certification, you must document the activities that account for 600 classroom hours facilitating learning. Refer to the TRSS Instructor Certification CONOPS for a list of the activities that are considered "facilitating learning."

Facilitating Learning Activity	Date(s) & Location Completed	# of Hours
Total # of Hours		

MENTORING:

To qualify for Senior-level certification, you must mentor one instructor, any level at a minimum. Provide a brief narrative of the mentoring activities you conducted and include the names of the people you mentored. See the TRSS Instructor Certification CONOPS for a list of activities that can fulfill the mentoring requirement.

PEER OBSERVATION/FORMATIVE ASSESSMENTS CONDUCTED:

To qualify for Senior-level certification, you must perform at least one formative (informal) assessment of a Senior/Master instructor. List the dates, course names, and names of instructors for whom you conducted a formative assessment.

Date	Course Name	Instructor

CODE OF CONDUCT

I have reviewed the Training Readiness Support Services Instructor Code of Conduct.

I agree to abide by the Code of Conduct

REQUIRED SIGNATURES:

Instructor

I have completed the necessary requirements for TRSS Instructor certification.

Date:

Printed Name:

Signature: _____

Supervisor/Course Manager

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Task Order Lead

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Attached Documentation Checklist:

- Waiver for TRSS Instructor Training Course (SGICC)
- Completed feedback forms

For Quality Assurance Manager Use Only

Date: [Click here to enter a date.](#)

Documentation attached:

- Yes
- No

Application signed:

- Yes
- No

In accordance with the Training Readiness Support Services Instructor Certification Plan, this application is:

- Approved
- Disapproved

Quality Assurance Manager Signature and Date:

[Click here to enter text.](#)

Quality Assurance Manager
Training Readiness Support Services

**APPENDIX F: MASTER INSTRUCTOR RECORD TRACKING
LOG**

INSTRUCTIONS:

Instructor(s): Please complete and submit this form as part of your application package to your Supervisor/Course Manager.

Supervisor/Course Manager: Upon validation, please provide the package to your Task Order Lead.

Task Order Lead: Upon validation, please provide the package to the Quality Assurance Manager.

INSTRUCTOR INFORMATION

Please complete the following:

Name: Date of Submission:

Task Order/Functional Area Name:

Office Mailing Address: Mentor (optional):

City, State and Zip:

Office Phone No.: Secure Phone No.:

PROFESSIONAL DEVELOPMENT

Master Instructor candidates must complete 40 hours of relevant professional development annually. See the TRSS Instructor Certification Plan for a list of additional activities that can fulfill the Professional Development requirement.

Topic Area (Technical Facilitation, Other)	Activity (Formal Education, Professional Development, Self Directed)	Description	Date(s) Completed	# of Hours
Total # of Hours				

ASSESSMENTS:

To qualify for Master-level certification, you must show two formative assessments and one summative assessment. List the specific dates, course/modules/blocks of instructions, and name(s) of the Senior/Master instructor or Supervisor/Course Manager who observed you facilitating. Completed feedback forms must be attached.

Date	Course/Module/Block of Instruction	Observer/Assessor

EXPERIENCE FACILITATING LEARNING:

To qualify for Master -level certification, you must document the activities that account for 1200 classroom hours facilitating learning. Refer to the TRSS Instructor Certification Plan for a list of the activities that are considered "facilitating learning."

Facilitating Learning Activity	Date(s) & Location Completed	# of Hours
Total # of Hours		

MENTORING:

To qualify for Master -level certification, you must mentor at least one colleague, any level. Provide a brief narrative of the mentoring activities you conducted and include the names of the people you mentored. See the TRSS Instructor Certification Plan for a list of activities that can fulfill the mentoring requirement.

PEER OBSERVATION/FORMATIVE ASSESSMENTS CONDUCTED:

To qualify for Master-level certification, you must perform at least one formative (informal) assessment of a Senior/Master instructor. List the dates, course names, and names of instructors for whom you conducted a formative assessment.

Date	Course Name	Instructor

CODE OF CONDUCT

I have reviewed the Training Readiness Support Services Instructor Code of Conduct.

I agree to abide by the Code of Conduct

REQUIRED SIGNATURES:

Instructor

I have completed the necessary requirements for TRSS Instructor certification.

Date:

Printed Name:

Signature: _____

Supervisor/Course Manager

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Task Order Lead

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Attached Documentation Checklist:

- Waiver for TRSS Instructor Training Course (SGICC)
- Completed feedback forms

For Quality Assurance Manager Use Only

Date: [Click here to enter a date.](#)

Documentation attached:

- Yes
- No

Application signed:

- Yes
- No

In accordance with the Training Readiness Support Services Instructor Certification Plan, this application is:

- Approved
- Disapproved

Quality Assurance Manager Signature and Date:

[Click here to enter text.](#)

Quality Assurance Manager
Training Readiness Support Services

APPENDIX G: APPLICATION FOR GRANDFATHERING

INSTRUCTIONS:

Instructor(s): Please complete and submit this form as part of your application package to your Supervisor/Course Manager.

Supervisor/Course Manager: Upon validation, please provide the package to your Task Order Lead.

Task Order Lead: Upon validation, please provide the package to the Quality Assurance Manager.

INSTRUCTOR INFORMATION:

Please complete the following:

Date of Application:

First Name:

MI:

Last Name:

Work Phone:

Task Order/Functional Area and Course:

PROGRAM INFORMATION

Provide a copy of the instructor certification (or applicable documentation) under a previous TRSS program or, if that is not available, submit a current resume. When providing a resume, include the following information:

- Contact Information: name, address, telephone number, e-mail address
- Education: school, degree(s) (if obtained), years attended
- Special training, Courses, and Certificates: where obtained and dates obtained
- Teaching employment history with dates of employment
 - List in chronological order
 - Include most important courses taught
 - Include estimated hours spent teaching each course
 - Include training and course designed and taught by the candidate
- Professional affiliations, including any officer positions held
- Names and dates of publications authored or co-authored by the candidate
- Presentations given within the last 10 years at conferences, conventions, or other agencies
- Special skills or qualifications
- Awards or special recognition received

Name of program under which you were previously certified: [Click here to enter text.](#)

Certification Level Previously Achieved	Date Achieved
<input type="checkbox"/> Instructor	
<input type="checkbox"/> Senior Instructor	
<input type="checkbox"/> Master Instructor	

Required Courses	Completion Date
<input type="checkbox"/> TRSS Instructor Training Course (ITC)	
<input type="checkbox"/> Instructional Systems Design (ISD) Course (if applying for Senior/Master Instructor_	

Additional Comments/Information:

CODE OF CONDUCT:

I have reviewed the Training Readiness Support Services Instructor Code of Conduct.

I agree to abide by the Code of Conduct

REQUIRED SIGNATURES

Instructor

As the applicant for the above Instructor Certification requested, I attest that all of the information on this application and the accompanying documentation is accurate and true and that I have completed all requirements for this grandfathering.

Date:

Printed Name:

Signature: _____

Supervisor/Course Manager

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Task Order Lead

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Attached Documentation Checklist

- Previous Certificate
- Resume (required, if certificate is unavailable)

For Quality Assurance Manager Use Only

Date: [Click here to enter a date.](#)

Documentation attached:

- Yes
- No

Application signed:

- Yes
- No

In accordance with the Training Readiness Support Services Instructor Certification Plan, this application is:

- Approved
- Disapproved

Quality Assurance Manager Signature and Date:

[Click here to enter text.](#)

Quality Assurance Manager
Training Readiness Support Services

APPENDIX H: APPLICATION FOR EQUIVALENCY

INSTRUCTIONS:

Instructor(s): Please complete and submit this form as part of your application package to your Supervisor/Course Manager.

Supervisor/Course Manager: Upon validation, please provide the package to your Task Order Lead.

Task Order Lead: Upon validation, please provide the package to the Quality Assurance Manager.

INSTRUCTOR INFORMATION:

Please complete the following:

Date of Application:

First Name:

MI:

Last Name:

Work Phone:

Task Order/Functional Area and Course:

PROGRAM INFORMATION

Provide a copy of the instructor certification (or applicable documentation) under a previous TRSS program or, if that is not available, submit a current resume. When providing a resume, include the following information:

- Contact Information: name, address, telephone number, e-mail address
- Education: school, degree(s) (if obtained), years attended
- Special training, Courses, and Certificates: where obtained and dates obtained
- Teaching employment history with dates of employment
 - List in chronological order
 - Include most important courses taught
 - Include estimated hours spent teaching each course
 - Include training and course designed and taught by the candidate
- Professional affiliations, including any officer positions held
- Names and dates of publications authored or co-authored by the candidate
- Presentations given within the last 10 years at conferences, conventions, or other agencies
- Special skills or qualifications
- Awards or special recognition received

Certification Level Previously Achieved	Date Achieved
<input type="checkbox"/> Instructor	
<input type="checkbox"/> Senior Instructor	
<input type="checkbox"/> Master Instructor	

Certifying agency/Service:

Please provide a description of the program requirements, such as formal training, mentoring, number of hours facilitating learning, assessment requirements, etc., for the level of certification achieved.

CODE OF CONDUCT

I have reviewed the Training Readiness Support Services Instructor Code of Conduct.

I agree to abide by the Code of Conduct

REQUIRED SIGNATURES:

Instructor

I have completed the necessary requirements for TRSS Instructor certification.

Date:

Printed Name:

Signature: _____

Supervisor/Course Manager

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Task Order Lead

I have reviewed the documentation and validate that the necessary requirements have been met.

Date:

Printed Name:

Signature: _____

Attached Documentation Checklist:

- Instructor Certificate (required)
- Personnel Record that shows certification (required when certificate is not available)
- Resume (required, if certificate and/or personnel record are unavailable)
- Documentation describing certification program (optional, but helpful)

For Quality Assurance Manager Use Only

Date: [Click here to enter a date.](#)

Documentation attached:

- Yes
- No

Application signed:

- Yes
- No

In accordance with the Training Readiness Support Services Instructor Certification Plan, this application is:

- Approved
- Disapproved

Quality Assurance Manager Signature and Date:

[Click here to enter text.](#)

Quality Assurance Manager
Training Readiness Support Services