

Can I Set Up A Training Course for My Organization? (Dick Dooley, Training Team Leader)

Believe it or not.....Yes! And oddly enough, it gets easier as time goes on.....how? Read on!

With regionalization (back in 1997) came a HQ USARPAC memo-- commonly referred to as *Delegated Training Authority* to all its organizations which essentially let local directorates approve both Government and nonGovernment civilian training...a practice that before had to go thru the local CPOs. The Pacific Region web site has extensive information on Delegated Training Authority at <http://pacific-cpoc.ak.pac.army.mil/220600/index.html> .



However, as we all know, with broader freedom to use a credit card and approve training independently, comes accountability. It's not rocket science stuff, but nonetheless, important information for anyone who happens to wear a hat which authorizes him/her to use a credit card and/or approve civilian training.

A very critical component of that delegation of training authority (meaning when you decide to select a training vendor for training) is the following:

- For training under **\$2,500**, no competitive process is required (IMPAC credit cards are encouraged) and a DD Form 1556 should still be completed to establish record keeping.
- For training **between \$2,500 and \$25,000** (whether an individual instance or class), organizations **must** document a competitive process and records must be maintained (selection criteria, vendors considered, rationale for selection, etc.). The credit card will still be used as a purchasing instrument and the 1556 utilized to establish history.
- For training **over \$25,000**, you must go through your servicing Contracting Office in accordance with Federal acquisition regulations.

DA has put together 2 nifty checklists to help you out in your record keeping: one, that lays out specifically what logistically should be done when putting a training course together; and, two, a simple and short matrix that will help the training manager ensure all information and source selection information has been considered.

You can customize the list in any way to meet the needs of your directorate. Plus, it is an excellent tool to use & maintain, and nice to have handy when auditors and examiners want to take a look at how you spent your money.....and believe me.....that day will come.

SAMPLE COURSE MANAGEMENT CHECKLIST

TASK	COURSE MANAGER	REGISTRAR	AUTO TRNG SYSTEM	INITIAL & DATE
1. Create course file.	X			
2. Identify: - Course Objectives - Trainees - Prerequisites - Vendor - POC	X			
- Instructor Information - Training Method - Course Materials & Provider - Classroom Equipment				
3. Establish cost and follow appropriate procurement procedures.	X			
4. Establish date, hours & size of class.	X			
5. Reserve classroom.	X			
6. Determine course nomination procedure.	X			
7. Determine evaluation processes and levels. Prepare evaluation tools.	X			
8. List special requirements.	X			
9. Issue announcement - Course title - Course/DCPDS number - Date, hours & location - Cut-off date for nominations - Target audience	X	X		
- Course description - Max class size - Nomination procedure - Payment instructions - Course manager name, Phone number & e-mail				
10. Ensure announcement is included in automated training system/region web page.		X	X	
11. Oversee/coordinate course funding.	X			
12. Assist with instructor TDY (if applicable).	X			
13. Maintain dialog with instructor.	X			
14. Resolve conflicts involving nominations & scheduling.	X			
15. Accept nominations through automated training system or other authorized methods.		X		
16. Prepare course roster/sign-in sheet.	X			
17. Issue training course confirmation notice and/or reporting instructions to students.		X		
18. Receive & organize course materials.	X			
19. Prepare reproduction work order for course materials (if applicable).		X		
20. Make final preparations with Instructor no later than two weeks before course start date.	X			
21. Prepare Administrative Materials		X		
22. Provide/test classroom equipment (if applicable).	X	X		
23. Set up classroom (if applicable).	X	X		
24. Provide administrative remarks/conduct Course.	X			
25. Support class and instructor.	X			
26. Prepare final course roster & certificates.	X			
27. Conduct evaluation processes.	X			
28. Provide closing remarks & ensure room returned to original state (if applicable).	X			
29. Prepare after action report & summary of evaluation.	X			
30. Prepare & file permanent course record.		X		

COMPETITIVE TRAINING DOCUMENTATION MATRIX

Used to document competitive process for training occurrences between \$2,500 and \$25,000.

PART I: COURSE INFORMATION:

<u>Course Title/Subject</u>	
Target audience	
Proposed date	
Point of contact	
Phone number	
E-mail address	
Number of participants	
Proposed course location	
Maximum budget	
Course objectives (attach additional sheet if necessary)	_____ _____ _____
Special requirements (attach additional sheet if necessary)	_____ _____ _____

PART II: IDENTIFICATION OF TRAINING SOURCES:

The following training sources were reviewed against the above requirement (attach supporting documentation provided by vendor).

Vendor	Course Length	Max. Attendees	Materials Included	Travel Included	Total Cost	Cost Per Person

PART III: SELECTION OF TRAINING SOURCE:

The following training source was selected to meet this training need:

This vendor was selected because (check all that apply):Quality of training.

- Unique capability of training.
- Not available in Government.
- Timeliness.
- Most cost effective.
- Location.
- Sole Source.
- Other _____

Signature of selecting official Date Course Manager