

CHAPTER 5

ASSESSMENT

The truth is sought, regardless of whether pleasant or unpleasant.

LTG Leslie J. McNair

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Training assessment is an integral part of the training management cycle. Information obtained as a result of a thoroughly planned evaluation provides the basis for the commander's and leader's assessment of his unit and training program. Throughout, leaders benefit through the leadership assessment and development program that occurs concurrently with the training evaluation and assessment process. Ultimately, adjustments are made in resources, personnel, training methods, and other areas to refine the training program focus.

UNIT ASSESSMENT

Leaders use evaluations and other feedback to assess soldier, leader, and unit proficiency. The analysis of the information provided through evaluations is the key mechanism that commanders use for their assessment. Additionally, commanders can adjust priorities and resources

as necessary to synchronize all unit functions. To assess training proficiency and selected tasks, commanders—

- Select type of evaluation.
- Develop an evaluation plan.

- Conduct evaluation of training.
- Conduct after action reviews.
- Provide feedback to chain of command.

Figure 5-1 lists important sources of information that assist leaders in assessing their units' training status and ability to accomplish wartime missions.

Sources for training assessment

- **Personal observations of training.**
- **Assessment and feedback from higher headquarters.**
- **Staff visit reports.**
- **Unit status reports.**
- **Training briefings.**
- **Local external evaluations.**
- **CTC take home packages.**
- **After action reviews from FTXs, ODTs, gunnery periods, or other major exercises.**
- **AT reports (FORSCOM Form 1-R, *Analysis of Training Performance of Reserve Components of the Army*).**
- **CTT.**
- **UCOFT and MCOFT results.**
- **EDRE reports.**
- **Maintenance and logistical evaluations.**
- **Technical inspection results.**
- **Nuclear weapons technical inspections (such as TVIs and NSIs).**
- **IG special inspections or command readiness inspections.**
- **Commanders' inspection program.**
- **Force integration reports and feedback.**
- **Army Audit Agency reports.**
- **APFT scores.**
- **Weapons qualifications records.**
- **Readiness group assistance input.**
- **Annual service practice results.**

Figure 5-1.

EVALUATION

The evaluation process is continuous. Therefore, evaluations must be planned for all training and considered as a way of life in the unit. Training evaluation is integral to training management and is conducted by leaders at every level.

Evaluation of training measures the demonstrated ability of soldiers, leaders, and units to perform a task against Army standards. It is a snapshot, at a given time, on whether or not

the task was conducted to standard under prescribed conditions.

Each training event is evaluated during training execution. Planning for training must include resources (such as leader time, prerequisite training, evaluators, and equipment) to facilitate evaluation. The use of evaluation data can have a strong positive (or negative) effect on command climate of the unit.

Evaluations are used to—

- Provide feedback on training proficiency to those participating in the training event (using AARs).
- Assess METL task proficiency.
- Develop lessons learned for distribution throughout the command, and the Army, when applicable.
- Shape future training plans.
- Enhance leader development.

TYPES OF EVALUATIONS

Evaluations can be informal or formal and internal or external. Key points for each type of evaluation follow.

Informal evaluations are most commonly used at battalion level and below. They are—

- Conducted by all leaders in chain of command.
- Continuous.
- Used to provide immediate feedback on training proficiency.

Formal evaluations are usually scheduled on the long-range and short-range calendars. These include ARTEP evaluations, EIB, EFMB, and TVIs. They are—

- Sometimes unannounced, such as an EDRE.
- Normally highlighted during QTBs and YTBs.
- Resourced with dedicated evaluators or OCs.

Internal evaluations are planned, resourced, and conducted by the unit undergoing the evaluation. *External evaluations* are also planned and resourced. However, they are normally conducted by the headquarters two levels above the unit being evaluated. For example, division evaluates battalions; brigade evaluates companies; battalion evaluates platoons; and company evaluates sections, squads, teams, or crews.

These evaluations can be combined to meet the particular needs of the units or soldiers being evaluated. Figure 5-2 shows the application of each combination. Regardless of the type of evaluation, leaders must be present at all training—personally supervising and evaluating.

PLANNING FOR EVALUATIONS

The evaluation of collective training is critical to assessing a unit's capability to perform its METL tasks. For evaluation to be effective, it must be thoroughly planned and rigorously executed. Thus, leaders must begin the planning process as early as possible to provide an accurate evaluation.

RC commanders may request assistance from Maneuver Training Commands, partnership or affiliated units, CAPSTONE aligned units, or readiness groups to assist in the planning, preparation, and evaluation of training. However, the RC chain of command remains responsible for the evaluation.

Use of types of evaluations

Informal	
<u>Internal</u>	<u>External</u>
<ul style="list-style-type: none"> • Is a function of unit leadership whenever training is conducted; for example, squad leader checks vehicle PMCS. 	<ul style="list-style-type: none"> • Conducted by leaders during visits to training of subordinate units; CSM spot checks soldiers' range cards.
Formal	
<u>Internal</u>	<u>External</u>
<ul style="list-style-type: none"> • Best suited for squad-sized elements and below to document results; for example, squad leader evaluates his squad's collective tasks using MTP T&EOs. 	<ul style="list-style-type: none"> • Best suited for evaluation of battalion-, company-, and platoon-level tasks; for example, battalion evaluates platoon ARTEPs.

Figure 5-2.

The chain of command needs the following information to facilitate long-range evaluation planning:

- Type of exercise (battalion FTX, company FTX, company STX, TEWT).
- Dates of exercise.
- Type of evaluation (formal, informal, internal, external, or combination).
- Support requirements (internal and external).
- Coordination for external evaluation support.

More detailed evaluation planning occurs as time draws near. To continue effective short-range planning, the commander and key leaders develop and provide the following information:

- Commander's intent and focus for the exercise.
- Pre-execution checklist.
- Level of evaluation; for example, down to platoon level.
- Dates for training the evaluators.
- Plan for conduct of evaluator training.

The commander and key leaders also provide a completed evaluation and control plan. The plan contains—

- Intent of the exercise and the evaluation.
- Evaluation procedures.
- Exercise scenario.
- Training objectives.
- Guidance on conduct of AARs.
- Resource guidance.
- Required coordination.
- Discussion on evaluators' role in safety.
- Rules of engagement.
- References (SMs, FMs, MTPs, and SOPs (including those of slice units)).
- Evaluation checklists (to include T&EOs).

Refinement of the evaluation plan continues up to execution. This accommodates changes made to the events and evaluation plan and to resource allocations.

EVALUATORS

Evaluators must be highly qualified to enhance the training experience for the evaluated unit by providing valid, credible observations. The evaluator should be equal or senior in rank to the leader being evaluated. Ideally, the evaluator should have held the position himself, as it lends credibility to his role.

Leaders and soldiers learn from the evaluator. Likewise, the evaluator learns by observing the unit. Listed below are some basic rules for the evaluator:

- Be trained and rehearsed.
- Know the terrain. (Conduct reconnaissance when possible.)
- Don't be argumentative.
- Identify strengths as well as weaknesses.
- Patiently observe all actions of a unit. (Don't jump to conclusions.)
- Always use the chain of command. (Don't take command of the unit.)
- Be prepared to coach unit leaders.
- Be flexible; base evaluation on unit's reaction to the tactical situation, not on personal knowledge of the preplanned scenario.
- Do what the soldiers do. Experience the same conditions as the evaluated unit.
- Know OPFOR training objectives.

Evaluation planners should use an evaluator worksheet, such as the example in Figure 5-3. This helps determine the best evaluator organization. The task evaluation matrix at Figure 5-4 aids in this determination.

Evaluator group organization worksheet

Type of Exercise: FTX.

Duration of the Exercise: 2 days.

Frequency of Exercise: 2 platoons every 2 days (4 platoons, 1 per company).

Level of Evaluation: platoon and below.

Tasks Selected for Evaluation: (See evaluation matrix, Figure 5-4.)

Types of Evaluation: (See evaluation matrix, Figure 5-4.)

Availability of Evaluator Personnel with Appropriate Skills:

- Platoon level - 2 CPT staff officers (for example, Assistant S3 or S4).
- Squad/crew level - 2 platoon sergeants and or staff NCOs (for example, operations sergeant).
- Soldier level - All the above.

Suggested Organization Based on the Above Information:

- Chief Evaluator(s) - Battalion commander/CSM.
- Platoon Evaluators - 1 officer evaluator per platoon.
- Squad Evaluators - 1 NCO evaluator per platoon.

NOTES:

1. Each platoon will have two evaluators at all times. These evaluators conduct multiechelon evaluations.
2. Evaluations will be conducted during the TF 1-77 FTX.
3. AARs will be conducted at the conclusion of each event.
4. Chemical officer or NCO will evaluate during Cross Contaminated Area task.

Figure 5-3.

Task evaluation matrix

TASKS (in sequence)	EVALUATION LEVELS		
	Platoon	Squad/Crew (# per platoon)	Soldier (# per squad)
Move Tactically	F/E	F/E (1)	I/I (All)
Defend	F/E	F/E (2)	F/E (3) I/E (3)
Movement to Contact	F/E	F/E (1)	I/E (5)
Cross Contaminated Area	F/E	F/E (All)	F/E (All)
Hasty Attack	F/E	F/E (2)	I/E (5)
Legend:			
F/E = Formal external evaluation.			
I/E = Informal external evaluation.			
I/I = Informal internal evaluation.			

Figure 5-4.

Evaluators must be trained prior to conducting evaluations. This ensures they are technically and tactically competent and understand

their responsibilities during evaluations. Training should include the elements listed in Figure 5-5.

Evaluator training

- **Army doctrine.**
- **Safety and environmental considerations (per OPORD).**
- **Conduct of required rehearsals.**
- **Purpose and scope of the exercise.**
- **Training objectives.**
- **Training and evaluation outlines.**
- **Enemy situation (per OPORD).**
- **OPFOR organization.**
- **Participating units' task organization and METL.**
- **Communications plan.**
- **Maneuver rights area (MRA) restrictions.**
- **Rules of engagement (ROE).**
- **Intelligence plans.**
- **Controller duties.**
- **Reconnaissance.**
- **Communications responsibilities and checks (daily back brief to battalion commander).**
- **Required records and reports.**
- **Casualty and damage assessment.**
- **AARs.**

Figure 5-5.

AFTER ACTION REVIEW

The AAR is a structured review process that allows training participants to discover for themselves what happened, why it happened, and how it can be done better. AARs—

- **Focus on the training objectives.** (Was the mission accomplished?)
- **Emphasize meeting Army standards.** (AARs do not determine winners or losers.)
- **Encourage soldiers to discover important lessons from the training event.** (They are not a critique.)
- **Allow a large number of soldiers and leaders (including OPFOR) to participate so that lessons learned can be shared.**

The AAR consists of four parts:

- **Review what was supposed to happen (training plan).**

- **Establish what happened (to include OPFOR point of view).**
- **Determine what was right or wrong with what happened.**
- **Determine how the task should be done differently next time.**

The AAR is often used as a leader development technique to develop leaders throughout the entire chain of command. Leaders may use the AAR for an extended professional discussion with subordinate leaders. At completion of the exercise, a final AAR is conducted. It is a meeting with the evaluators or OCs, OPFOR, and unit leaders to review the training just conducted. Training weaknesses identified during AARs must be included in future planned training. Detailed discussion of AARs is at Appendix G.

TRAINING ASSESSMENT

After the conduct of the final AAR, the commander reviews the evaluation and AAR results to assess his unit's training proficiency. The commander's assessment of training proficiency on mission essential task list tasks is rated as either "T" (trained), "P" (needs practice), or "U" (untrained). (See page 3-13.) As discussed in Chapter 3, those battlefield operating systems that do not apply to the task are left blank on the commander's assessment worksheet.

NCOs may use a leader book in assessing squad, crew, and soldier proficiency (see Appendix B). The commander uses the assessment worksheet to record training weaknesses. This information helps to identify a strategy to improve or sustain training proficiency. Other worksheet formats which identify subunits instead of BOS may be used for the commander's assessment (see Figure 3-15, page 3-18). Regardless of its format, the worksheet is only a tool for the commander to plan training.

EXAMPLE TRAINING ASSESSMENTS

To illustrate the concept of training evaluations and assessments, the following examples from the Task Force 1-77 FTX, 52d Engineer Battalion CFX, and 1st FSB FTX (EXEVAL) are provided.

TF 1-77 FTX

Evaluations

At the completion of TF 1-77's FTX, evaluators provided written evaluations on the tasks performed. Evaluation results were recorded on the T&EOs from the applicable MTP. T&EO extracts from the TF, Team A, and 1st Platoon, Team A, are at Figures 5-6 through 5-8, pages 5-8 through 5-10. An extract from the squad leader's evaluation of his soldiers' proficiency in the task Prepare a Fighting Position is at Figure 5-9, page 5-11.

After Action Reviews

The leaders used the AARs as their final piece of information focusing on what happened, why it happened, and how to do it better. Through the AAR process, the chief OC was able to have unit members describe what happened in their own words and from their own points of view. This helped evaluators and unit leaders to focus on whether or not the mission was accomplished so that leaders could link lessons learned to subsequent training.

As a result of the AARs, the TF 1-77 commander discovered the unit had improved considerably on the tasks Movement by Road/Rail and Defend. However, the unit still had problems with the task Assault during the company STXs. The AAR revealed that coordination and adjustment of artillery and mortar fire slowed the assault, making the indirect fire ineffective. It also revealed that the slow commitment of engineer assets resulted in the companies spending too much time exposed to enemy fire at enemy obstacles. Much better coordination and integration of the slice units were needed during planning and preparation.

This type of feedback from the AARs, coupled with an after action report, provided information the TF 1-77 commander needed—

- To determine his assessment of each mission essential task.
- To develop a training strategy for future training.
- To plan and conduct additional training.

Commander's Training Assessment

Based on the training evaluation results, AARs, and their own personal observations, the TF and Team A commanders assessed their units on each METL task trained. Extracts of those assessment are at Figures 5-10 and 5-11, page 5-12.

TF 1-77 training evaluation extract

ELEMENT: BATTALION TASK FORCE (TF 1-77)

TASK: DEFEND (7-1-3009) (FM 71-2)

ITERATION

12345 (circle)

TRAINING STATUS

GO

NO-GO (circle)

CONDITION: The TF defends in the forward portion of the MBA. A covering force forward of the TF gives the TF early warning. The covering force withdraws. The enemy performs reconnaissance, breaching, and infiltration to prepare for the attack. The enemy attacks with an MRB(+).

NOTE: This task may be a battle position defense or defense in sector, depending upon METT-T factors.

TASK STANDARD:

a. The TF is prepared to defend at the time prescribed.

b. The enemy MRR is defeated forward of the battalion rear boundary.

c. The TF performs the defense IAW the brigade commander's intent for coordination with adjacent TFs.

d. There is no penetration of rear boundary by an MRC(+) or more.

SUBTASKS AND STANDARDS:

GO

NO-GO

<div>*1. TF commander and staff plan the defense and issue an OPORD that -<div><div>a. Identifies engagement areas along each approach where the enemy is most vulnerable. It provides for positions, weapons, and obstacles to destroy the enemy in those areas.</div><div>b. Breaks up the enemy formation to expose him to flanking fires from multiple directions and to not allow him to fight a linear battle. OBSTACLE PLAN DID NOT CANALIZE ENEMY INTO ENGAGEMENT AREA.</div><div>c. Uses full depth of the sector consistent with the brigade commander's concept for synchronization with adjacent TF.</div><div>d. Uses displacement for subsequent positions, which are planned and coordinated with obstacles and covering fire. SUBSEQUENT POSITIONS NOT PLANNED ALONG PRIMARY AVENUES OF APPROACH.</div><div>e. Blocks or slows the enemy on all likely mounted and dismounted approaches with enough defending forces and obstacles to allow maneuver forces to mass on the approaches being used. OBSTACLES WERE PLANNED BUT NOT IMPLACED.</div><div>f. Provides for flexibility by having depth and contingency plans for shifting fires or counterattacks to mass forces on approaches the enemy actually uses. Identifies decision points to allow initiation of maneuver. Gives the engagement criteria, firing priorities, or engagement priorities. DID NOT HAVE TRIGGER LINES, ENGAGEMENT CRITERIA, OR ENGAGEMENT PRIORITIES.</div></div></div> <div><div><div>✓</div><div>✓</div><div>✓</div><div>✓</div><div>✓</div><div>✓</div></div><div><div></div><div>✓</div><div></div><div>✓</div><div>✓</div><div>✓</div></div></div>

*Leader task

+ Critical task

Figure 5-6.

Team A training evaluation extract

ELEMENT: TANK AND MECHANIZED INFANTRY COMPANY TEAM (TMA)

TASK: DEFEND (17-2-1021) (FMs 7-10 and 7-71)

ITERATION
TNG STATUS1 2 3 4 5 (circle)
GO NO-GO (circle)

CONDITION: The enemy is expected to attack mounted or dismounted with forces up to battalion-level strength supported by attack helicopters, indirect fire, and close air support. The enemy can be reinforced with up to company-sized units. The company team is defending battle positions as part of a battalion sector defense or is assigned a separate sector.

TASK STANDARD: The company team completes all preparations directed by the commander not later than the time specified in the order. The company main body is not surprised by the enemy. The company team decisively engages the enemy. The company team destroys, blocks, delays for the specified time, and canalizes the enemy into the designated area. The company team denies and prevents penetration of specified boundary or terrain.

SUBTASKS AND STANDARDS:

	GO	NO-GO
* + 1. The commander develops a defense plan. (See T&EO 17-2-0101, Prepare for Combat, this MTP.)	✓	
a. The commander identifies enemy avenues of approach and areas of weakness along each (exposure, canalization, slow movement).	✓	
b. Platoons and obstacles are positioned to defeat enemy along all approaches at locations of weakness. DID NOT CONSIDER AN AVE OF APP ALONG LINK TRAIL		✓
c. Contingencies are made to shift fires and forces to any route being used by enemy (supplementary positions and secondary sectors of fire). HAD NO BACKUP SIGNALS OR CRITERIA TO SHIFT FIRES		✓
d. Fire control measures are developed to allow fires to be shifted and masses (engagement areas, sectors of fire, TRPs). LACKED CLEAR CRITERIA FOR USE OF TRPs, AND THEIR USE IN SHIFTING FIRES.		✓
e. Tank/TOW positions are selected to provide flanking fires on enemy approaches, provide cover, and allows covered entry/exit.	✓	
f. Infantry positions are selected to block enemy mounted/dismounted approaches where infantry is not exposed to standoff fires and protected by obstacles from mounted assault.	✓	

*Leader task

+ Critical task

Figure 5-7.

1st Platoon, Team A, training evaluation extract

ARTEP 17-237-10-MTP

ELEMENT: TANK PLATOON 1ST PLT, TMA

TASK: OCCUPY A PLATOON BATTLE POSITION (17-3-0222) (FM 17-15) (FM 71-1)

ITERATION 1 2 3 4 5 (circle)
TRAINING STATUS GO NO-GO (circle)

CONDITION: The platoon is operating as part of a company team defensive operation and has been given an OPORD to move to and occupy a battle position (BP). The terrain can vary from rolling hills to parched, flat desert, but must offer definable avenues of approach and permit a concentration of fires; soil must be trafficable. Engineer assets are available. Sufficient time is available to conduct a deliberate occupation. The commander specified the time and location for coordination between adjacent platoons. Threat contact is not likely prior to the NLT-time specified in the OPORD or OPLAN.

TASK STANDARD: The platoon moves to the assigned BP, completes the deliberate occupation, and reports established at or before the "defend NLT" time given in the OPORD. Coordination with adjacent platoons is conducted, conflicts are resolved, and any changes to the platoon's plan resulting from the coordination are disseminated.

SUBTASKS AND STANDARDS:

	GO	NO-GO
1. The platoon moves to the rear or flanks of the assigned BP.	✓	
a. Moves into a hide position behind the BP, forms a coil or herringbone, and conducts a simultaneous shutdown.	✓	
b. The PSG, TCs, and security personnel dismount their vehicles, move to the BP, and report to the plt ldr.	✓	
c. The plt ldr establishes local security by emplacing the OP(s).	✓	
2. The platoon leader leads the platoon in a reconnaissance of the BP. The plt ldr points out terrain that corresponds to the platoon's and company's graphic control measures and briefs the scheme of maneuver.	✓	
a. Plt ldr shows location of company BP, company target reference points (TRPs), and engagement areas.	✓	

*Leader task
+Critical task

NEEDS PRACTICE, PLOTTING ON MAP.
FIRE SPT PLANNING

Figure 5-8.

Squad training evaluation extract

ELEMENT: SQUAD 1ST S&P, 1ST PLT, 1MA

TASK: DEFEND (7-3/4-1021) (FM 7-7) (FM 7-8) (FM 7-70)

ITERATION

TRAINING STATUS

1 2
GO

3

4 5 (circle
NO-GO (circle)

CONDITION:

The platoon is ordered to occupy, prepare, and defend a battle position or sector as a separate unit or as part of a larger force. The enemy can attack in company-size strength, either mounted or dismounted. Both friendly and enemy elements are supported by indirect fire and CAS.

TASK STANDARD:

1. The platoon completes all designated preparations NLT the time specified in the order.
2. The platoon main body is not surprised by the enemy.
3. The platoon accomplishes its assigned task. Destroys, blocks, delays for the specified time, and canalizes the enemy into the designated area.
4. The platoon sustains no more than two vehicles losses.

SUBTASKS AND STANDARDS:

24. The platoon prepares defensive positions.

- a. A two-man fighting position is constructed to provide-

-Front, side, and rear protection

-Overhead cover (18 inches of dirt and or logs). DID NOT HAVE LOGS OR SUITABLE MATERIAL ON 75% OF POSNS.

-Concealment from all angles. POOR CAMOUFLAGE, TWO VEHICLES AND ONE FIGHTING POS NOT CAMOUFLAGED

-Observation of sectors of fire.

-Overlapping fields of fire with the positions to the right and left. NEEDS APD WORK, TWO NEIGHBORING POSNS DID NOT OVERLAP FIELD OF FIRE.

- b. Fighting positions contain the following construction features:

-Armpit depth.

-Shoulder width.

-Grenade sump. NEEDS EMPHASIS. 50% OF POSITIONS DID NOT HAVE GRENADE SUMPS.

-Aiming and limiting stakes.

-Elbow, bipod or tripod space, or holes.

-Water drainage. 50% OF POSITIONS DID NOT HAVE WATER DRAINAGE.

GO

NO-GO

✓	
	✓
	✓
✓	
✓	
✓	✓
✓	
	✓

*Leader task

+ Critical task

Figure 5-9.

TF 1-77 commander's training assessment extract

MISSION ESSENTIAL TASK	CURRENT TRAINING STATUS							OVERALL	STRATEGY TO IMPROVE OR SUSTAIN TRAINING PROFICIENCY TO WARFIGHTING
	I N T	M A N	F S	M / CM /S	A D	C S S	C 2		
MOVE BY ROAD/RAIL	T	T				T	T	T	<ul style="list-style-type: none"> SUSTAINMENT TRAINING ONLY
PERFORM TACTICAL ROAD MARCH	P	P	T	P	T	P	P	P	<ul style="list-style-type: none"> SCHEDULE LEADER DEVELOPMENT SEMINAR ROAD MARCH TO ALL TRAINING
DEFEND	T	T	T	P	T	T	T	T	<ul style="list-style-type: none"> SCHEDULE LEADER DEVELOPMENT CLASS ON MOBILITY, COUNTERMOBILITY, SURVIVABILITY CONDUCT A CFX NEXT QUARTER
ASSAULT	P	P	P	U	P	T	P	P	<ul style="list-style-type: none"> ADD THIS TASK TO CO/PLT ARTEP, INTEGRATE ENGR PLT LDR IN LEADER DEVELOPMENT AND ALL TRAINING EXERCISES

*Figure 5-10.**Team A commander's training assessment extract*

MISSION ESSENTIAL TASK	CURRENT TRAINING STATUS							OVERALL	STRATEGY TO IMPROVE OR SUSTAIN TRAINING PROFICIENCY TO WARFIGHTING
	I N T	M A N	F S	M / CM /S	A D	C S S	C 2		
MOVE BY ROAD/RAIL	T	T				P	T	T	<ul style="list-style-type: none"> SUSTAINMENT TRAINING FOR COMPANY
PERFORM TACTICAL ROAD MARCH	P	T	P	P	P	P	T	P	<ul style="list-style-type: none"> CONDUCT AS MULTIECHELON EVENT DURING ALL FIELD EXERCISES
OCCUPY ASSEMBLY AREA	P	P	P	P	T	P	P	P	<ul style="list-style-type: none"> CONDUCT AS OPPORTUNITY TRAINING DURING GUNNERY
DEFEND	P	P	P	P	T	P	P	P	<ul style="list-style-type: none"> CONDUCT LEADER DEVELOPMENT SEMINAR, TEWT, AND CFX DURING GUARD AND DETAIL

Figure 5-11.

52D ENGINEER BATTALION CFX

Evaluations

The 52D Engineer Battalion CFX provided valuable training feedback to the battalion leaders. The exercise did not involve a higher headquarter's directed external evaluation; however, the battalion commander wanted help in evaluating the battalion CP operation. He requested and received evaluators from the 25th Engineer Battalion. To evaluate selected operations conducted by A Company, the battalion S3 planned and conducted evaluator training and assisted the OCs from the 25th Engineer Battalion in preparing evaluation packets.

The evaluators prepared evaluation packets using ARTEP 5-145-MTP, ARTEP 5-145-31-MTP, ARTEP 5-145-11-MTP, and ARTEP 5-145-Drills. The battalion CP evaluators focused on the battalion staff tasks which had been designated as battle tasks. A Company was evaluated on its ability to construct hasty obstacles and conduct obstacle breaching operations. Figures 5-12 through 5-14, pages 5-14 through 5-16, are examples of the completed T&EOs that the evaluators provided.

After Action Reviews

Discussions during the offensive planning AAR revealed that the battalion's logistical planning was inadequate; it did not allow for full support of the battalion's mobility operations.

The battalion S4 pointed out that the companies had submitted their logistical requirements too late. The S4 section could not obtain the supplies prior to the offensive. The evaluator from the 25th Engineer Battalion suggested the S4 could reduce the impact of late requests by anticipating the increased requirements for Class III and breaching materials needed to support battalion operations.

Obstacle reporting was a weakness discovered during the AAR conducted after the division's offensive operations. Companies and platoons moving forward in the offense had not reported some existing enemy and friendly obstacles. This caused severe problems for two division CSS units as they moved forward to their next position. They had to detour to avoid the obstacles and reached their new position several hours late. The loss of the CSS units' support for the additional time could have been avoided had the engineer units reported the obstacles.

Commander's Training Assessment

From the evaluators' comments, discussions during the AARs, and his own observations, the battalion commander assessed the training status of the unit. The results of the offensive phase of the exercise caused him to assess the battalion as "P" on two METL tasks, Conduct Logistical Operations and Report Obstacle Information.

52d Engineer Battalion training evaluation extract

PHASE B

ELEMENT: BATTALION STAFF 52d EN BN

TASK: PREPARE an operation plan/order (05-1-0007) (FM 5-30, FM 5-34, FM 5-100, FM 5-101, FM 5-103, FM 101-5, STANAG 2014)

ITERATION
TNG STATUS

① 2 3 4 5 (circle)
GO NO-GO (circle)

CONDITION: The battalion is performing continuous tactical operations in darkness and daylight under all weather conditions. The battalion receives a new mission requiring preparation of an operation plan/operation order (OPLAN/OPORD).

TASK STANDARD: The order follows the commander's intent, contains all information necessary to accomplish the mission and it is understood and can be executed by subordinate units.

SUBTASKS AND STANDARDS:

	GO	NO-GO
1. The battalion staff receives the mission from higher headquarters or the battalion commander.	✓	
2. The battalion staff receives and understands the commander's guidance.	✓	
+ 3. The battalion staff completes an engineer estimate. See T&EO 05-1-0002, Prepare an Engineer Estimate (Bn).	✓	
* + 4. Staff members prepare a written OPLAN/OPORD for their areas of responsibility.		
a. The XO supervises the staff during the preparation of the order and resolves any disagreements. Presents the order to the commander for final approval.	✓	
b. The S-3 coordinates the preparation of the order. Prepares the task organization; paragraph 1, situation, minus subparagraph 1b; paragraph 2, mission; paragraph 3, execution, with emphasis on the concept of operation and subordinate unit instructions; and paragraph 5, command and signal. Prepares any operations overlays or annexes.	✓	
c. The S-2 prepares paragraph 1b, enemy situation, and the intelligence annex when required. Provides the S-3 with any coordinating instructions.	✓	
d. The S-4 prepares paragraph 4, service support, and the service support annex when required. Provides the S-3 with any coordinating instructions.	✓	
e. The S-1 provides the S-4 with information on personnel and administrative services to be included in paragraph 4, service support, or the service support annex. Provides the S-3 with any coordinating instructions.	✓	
f. The maintenance officer provides the S-4 with information on maintenance services to be included in paragraph 4, service support, or the service support annex. Provides the S-3 with any coordinating instructions.	✓	

*Leader task

+Critical task

Figure 5-12.

A company, 52d Engineer Battalion, training evaluation extract

PHASE E

ELEMENT: COMPANY A, 52d ENGR BN

TASK: REPORT obstacle information (Co) (05-2-0025) (FM 5-30, FM 5-34, FM 5-36, FM 5-100, FM 5-101, FM 20-32, FM 101-5)

ITERATION
TNG STATUS

1	2	3	4	5 (circle)
GO				NO-GO (circle)

CONDITION: The engineer company receives obstacle and family of scatterable mines (FASCAM) information from subordinate elements and the battalion.

TASK STANDARD: Higher headquarters and subordinate units have accurate and timely information on obstacles in the area of operations.

SUBTASKS AND STANDARDS:

* 1. The company operation NCO receives the following obstacle information from the platoons, Battalion S-3, and/or the commander:

- | | GO | NO-GO |
|---|----|-------|
| a. Obstacle status report. Reports obstacles by serial number. | ✓ | |
| b. Scatterable mine record and report or scatterable mine warning report. See FM 20-32 (Mine/Countermining Operations). DID NOT RECEIVE NOR REQUESTED | | ✓ |
| c. Map sheet(s). | ✓ | |
| d. Date and time of report. | ✓ | |
| e. Location (eight digit grid coordinate). | ✓ | |
| f. Type. | ✓ | |
| g. Enemy situation. FAILED TO POST ENEMY SITUATION ON MAP | | ✓ |
| h. Progress and completion. | ✓ | |
| i. Additional assets or equipment required. Notifies the supply section and platoons of the type, quantity, and personnel. | | |
| j. Execution of the obstacle (time, name, platoon, type, location, and serial number). | ✓ | |
| k. Obstacle hand-off (time, name, platoon, type, location, and serial number). | ✓ | |

* + 2. The company operations NCO reports obstacle information to the commander, battalion S-3, and platoons.

- | | | |
|--|---|--|
| a. Reports to the commander the type of obstacle, who emplaced the obstacle, the status of progress, completion, hand-off, execution, enemy situation, scatterable mine execution, and plotting. See FM 20-32. | ✓ | |
| b. Reports to the battalion S-3 the status of progress, completion, execution, hand-off, scatterable mines, plotting, and request-intent. See FM 20-32. | ✓ | |
| c. Reports to the platoons possible hand-off, execution, type obstacle, location, serial number, emplacement, relocation of material, status of progress, scatterable mine emplacement, execution, and if assistance is required, the unit/location of tasked element. | ✓ | |

*Leader task

+ Critical task

Figure 5-13.

1st Squad, 1st Platoon, A Company, training evaluation extract

WITHDRAWAL PHASE		ITERATION #1 = ✓ ITERATION #2 = 2	
ELEMENT: ^{1ST} SQUAD, 1ST PLATOON, ALPHA COMPANY, 52d ENGR BN			
TASK: CREATE a crater obstacle with explosives (05-4-0201) (FM 5-25, FM 5-34)			
DRILL STANDARD = 25 MINUTES		ITERATION	
ITERATION #1 = 61 MINUTES		TNG STATUS	
ITERATION #2 = 27 MINUTES		<div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; border-radius: 50%; padding: 2px 5px;">1</div> <div style="border: 1px solid black; border-radius: 50%; padding: 2px 5px;">2</div> <div>3</div> <div>4</div> <div>5 (circle)</div> </div> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid black; border-radius: 50%; padding: 2px 5px;">GO</div> <div>NO-GO (circle)</div> </div>	
CONDITION: The squad is ordered to create a crater obstacle. A target reconnaissance has been conducted and the reconnaissance report is available.			
TASK STANDARD: The squad creates a crater obstacle within plus 25 percent of the time estimated in the reconnaissance report. The crater is a minimum of 1.8 meters (6 feet) deep, 6 meters (20 feet) wide, and the side slopes are a minimum of 25 degrees. Locations are accurate within 10 meters (33 feet). The crater is tied to existing or reinforced obstacles and stops or delays an enemy main battle tank (MBT).			
SUBTASKS AND STANDARDS:		GO	NO-GO
* 1. The squad leader obtains technical information from the reconnaissance report to include:		✓2	
a. A plan and side view sketch showing overall dimensions and lines of cut.		✓2	
b. For each row of craters, the location, depth, and quantity of explosives for each borehole, as well as the method of ignition.		✓2	
c. A sketch showing the firing circuits and firing point.		✓2	
d. A bill of explosives showing the quantity and types required, a list of required equipment, and an estimate of time and labor required to prepare and fire the demolition.		✓2	
+ 2. The squad picks up all materials and equipment needed for the demolition. Prepares demolitions in the rear to minimize time on site (e.g., cutting branch lines, priming blocks of explosives with detonating cord, etc.).		12	
* + 3. The squad leader issues orders to the squad using the five-paragraph field order format. Briefs each man on site security, noise and light discipline, and each member's specific tasks. (051-193-3055)		✓2	
4. The squad moves to the obstacle location.		✓2	
a. Personnel do not ride in the rear of the vehicle along with explosives.		✓2	
b. Carries blasting caps in a separate vehicle.		✓2	
NOTE: If this is not possible, place the caps in a closed metal can and carry in the front of the vehicle and carry the explosives in the rear.			
+ 5. The squad places shaped charges in the locations identified by the squad leader.		✓2	
NOTE: The platoon leader coordinates with the maneuver commander to ensure the final obstacle location is covered by direct and/or indirect fire and tied to existing or reinforced obstacles.			
6. The squad primes the shaped charges and connects branch lines to the ring main and primes the shaped charges.		2	✓
a. Does not dual prime shaped charges.		✓2	
*Leader task			
+Critical task			

Figure 5-14.

52d Engineer Battalion commander's training assessment

MISSION ESSENTIAL TASK	CURRENT TRAINING STATUS							OVERALL	STRATEGY TO IMPROVE OR SUSTAIN TRAINING PROFICIENCY TO WARFIGHTING
	I N T	M A N	F S	M / C M / S	A D	C S S	C 2		
PERFORM ENGINEER RECON	T	T		T		T	T	T	<ul style="list-style-type: none"> • BN/CO MAPEX EACH MONTH • BN CFX/CPX NEXT QUARTER • BDE/TF SPT CYCLE
PREPARE AN OBSTACLE PLAN	T		T		T	T	T	T	<ul style="list-style-type: none"> • BN/CO MAPEX EACH MONTH • BDE/TF SPT CYCLE
PREPARE AN OPLAN/OPORD	T	T	T	T	T	T	T	T	<ul style="list-style-type: none"> • BN CFX/CPX NEXT QUARTER • BDE/TF SPT CYCLE
REORGANIZE AS INFANTRY	P	P	P	T	P	P	P	P	<ul style="list-style-type: none"> • BN/CO MAPEX EACH MONTH • SQD STX MONTHLY • PLT FTX QUARTERLY

Figure 5-15.

Figure 5-15 shows the battalion commander's revised assessment of the four METL tasks rated "P" prior to the CFX. It also shows his strategy for correcting weaknesses and sustaining strengths.

1ST FSB FTX (EXEVAL)**Evaluations**

At the completion of 1st FSB's FTX (EXEVAL), evaluators provided written evaluations on the tasks performed. Extracts from evaluations of the battalion task Direct Response Against BSA Threat and the related company task Defend Company Sector are at Figures 5-16 and 5-17, pages 5-18 and 5-19.

After Action Reviews

The FSB commander used the AAR as the final piece of information. He focused on how well the tasks were performed and what the unit needed to do for future training. Through the AAR process, the chief OC heard soldiers describe what happened in their own words and from their own points of view. Following are comments made by unit members.

PVT Romero, legal clerk, HHD, 1ST FSB, stated that he had learned the importance of using the SALUTE format (size, activity, location, uniform, time, and equipment) to send a spot report and of properly camouflaging himself, his equipment, and position. He and another soldier were assigned LP and OP duty prior to one of the attacks. The enemy detected PVT Romero and was able to get very close to the perimeter of the BSA. When he did see the enemy, he was unable to send a clear and concise warning to the BSA.

Immediately afterward, PVT Romero received retraining on sending a report and camouflaging properly. He recommended that the unit conduct refresher training on basic combat survival skills for all soldiers prior to field training.

PFC Schmitt, supply specialist, A Company, 1st FSB, stated that his training with the reaction force had increased his tactical competence. He felt that the movement techniques he had learned were key to driving off the OPFOR during the FTX. He recommended that MILES be used more on the next FTX to enhance the training.

1st FSB training evaluation extract

ARTEP 63-005-MTP

1st FSB**ELEMENT: BASE CLUSTER OPERATIONS CENTER****TASK: DIRECT RESPONSE TO BSA THREATS (63-1-0027) (FM 63-2-2, FM 63-20, FM 90-14, STP 21-II-MQS, STP 21-24-SMCT).**

ITERATION	1	2	3	4	5 (circle)
TRAINING STATUS		GO		NO-GO	(circle)

CONDITIONS: OPFOR has been spotted in the BSA. Reports indicate the OPFOR is a Level II or Level III threat. BCOC is operational. Rear operations annex and SOP are available. Some base(s) in the cluster have reported initial attacks. Subordinate units/elements are providing current situation reports.

TASK STANDARD: OPFOR threat is repelled and/or delayed until relieved by MP elements or TCF. The BSA is defended with no unanticipated degradation of logistic support to the brigade.

SUBTASKS AND STANDARDS:

+ 1. BCOC makes appropriate response determination.

a. Verify threat level(s).

b. Identify capability of base(s) being threatened. **REPORTING WAS VERY POOR. SOLDIERS DID NOT USE SALUTE TO REPORT WHICH CAUSED CONFUSION AT ALL LEVELS.**

c. Identify base(s) priority. **NO PRIORITIES ESTABLISHED.**

+ 2. BCOC reports OPFOR location and size (071-332-5022).

a. Maintain map surveillance of OPFOR.

GO NO-GO

GO	NO-GO
✓	
	✓
	✓
✓	

*Leader task

+Critical task

Figure 5-16.

A Company, 1st FSB training evaluation extract

ARTEP 42-004-30-MTP

A CO, 1ST FSB
 ELEMENT: COMPANY

TASK: DEFEND AGAINST A LEVEL I ATTACK (63-2-0030) (FM 7-10, FM 90-14, STP 21-1-SMCT, STP 21-1-SMCT, STP 21-II-MQS, STP 21-24-SMCT)

ITERATION 1 2 3 4 5 (circle)
 TRAINING STATUS GO NO-GO (circle)

CONDITIONS: Automatic weapons fire is heard in the area. Company CP relays the perimeter guards report that three to five individuals with automatic weapons and satchels were attempting to infiltrate the perimeter. The company is currently supporting tactical operations. The company is at a moderate perimeter manning level. The Level I attack causes casualties and damage to company facilities.

TASK STANDARD: Attack is repelled using techniques outlined in the tactical SOP or OPORD.

SUBTASKS AND STANDARDS:

	GO	NO-GO
* + 1. Company commander or leaders direct response against a Level I attack (03-3164.00-0005, 071-326-5510, 071-326-5780).		
a. Forward incident report to the battalion S2/3. <i>VERY SLOW REPORTING. REPORTING WAS INCOMPLETE.</i>		✓
b. Verify threat size and location. <i>REPORT NOT SENT IN SALUTE FORMAT.</i>		✓
c. Direct perimeter manning level increase, as appropriate.	✓	
d. Direct company fire and maneuver to drive intruders from unit area. <i>DID NOT ATTEMPT TO CONDUCT FLANK ATTACK. SOLDIERS IND.</i>	✓	✓
e. Report current situation to battalion S2/3. <i>MYT. TECHS POOR.</i>	✓	
f. Provide coordination and assistance to supporting reaction forces.	✓	
g. Initiate all clear signal as soon as attack is over.	✓	

*Leader task

+ Critical task

Figure 5-17.

SFC Mills, platoon sergeant, B Company, said that the predeployment training the battalion had accomplished prior to the FTX was key to the successful deployment to the field. He felt that his soldiers had performed extremely well on uploading supplies and equipment and had gained confidence in their ability to deploy. SFC Mills also noted that the route to the BSA had only two artillery targets. He thought more targets were needed for the length of route. The S3 noted this weakness for future planning.

PVT Johnson, medic, C Company, 1st FSB, stated that his land navigation training had helped him in accomplishing his mission. He had received a “real world” mission to evacuate a soldier with a broken leg and had only grid coordinates of the location. His training allowed him to quickly navigate to the location, render aid, and evacuate the patient back to the BSA.

From the AAR feedback, the FSB commander found that the unit had improved considerably on the following tasks:

- Deploy to a combat area of operations.
- Conduct logistical operations.

- Casualty evacuation.

However, the unit still had problems responding to a threat to the BSA. The AAR revealed that many soldiers needed refresher training on basic combat tasks. The unit performed extremely well on these tasks during last year’s FTX but had conducted little sustainment training since. Many new soldiers were assigned to the battalion since that FTX and needed initial training. The FSB commander had considered the unit trained on basic combat skills and therefore had not emphasized sustainment training to subordinate leaders.

Commander’s Training Assessment

Feedback (such as above) from the AAR, coupled with the evaluation result, provided information the FSB commander needed to complete his training assessment and develop a plan for corrective actions. After assessing the unit’s level of proficiency on METL tasks, he developed a training plan to emphasize the following:

- Basic combat skills—refresher training.
- Casualty evacuation—sustainment training.

1st FSB commander’s training assessment extract

MISSION ESSENTIAL TASK	CURRENT TRAINING STATUS							OVERALL	STRATEGY TO IMPROVE OR SUSTAIN TRAINING PROFICIENCY TO WARFIGHTING
	I N T	M A N	F S	M / C M /S	A D	C S S	C 2		
DEPLOY TO COMBAT AREA OF OPERATIONS	T	T	P		T	T	T	T	<ul style="list-style-type: none"> • SUSTAINMENT TRAINING BN CFX NEXT QTR • EMPHASIZE FIRE SUPPORT PLANNING
CONDUCT LOGISTICAL OPERATION	T	T	P	P	P	P	T	P	<ul style="list-style-type: none"> • BN CFX NEXT QTR
CASUALTY EVACUATION		T	P	T	T	T	T	T	<ul style="list-style-type: none"> • SUSTAINMENT TRAINING BN CFX NEXT QTR • COORDINATE WITH 1ST BDE ON TRIAGE SIGNALS
DIRECT RESPONSE TO BSA THREAT	P	P	P	P	P	P	P	P	<ul style="list-style-type: none"> • BN CFX NEXT QTR • CONDUCT MORE SOLDIER TRAINING

Figure 5-18.

- Direct response to BSA threat-refresher training.
- Deploy to combat area of operations—sustainment training.

From the training evaluation results, AARs, and his own personal observations, the FSB

commander assessed his unit on each METL task as it related to the BOS (Figure 5-18).

The commander's assessment is not the end of training. It is the link that ties the evaluation of training to the planning of future training.