



LEADERSHIP AND MANAGEMENT SCHOOL

HOST UNIT CHECKLIST

Use of this checklist by the Host Unit is mandatory. The Lead Instructor and the Host Unit POC shall jointly review the completed checklist prior to the class convening and address any applicable outstanding items. Timely and frequent communication between the Host Unit POC and the Lead Instructor are essential to ensure a successful and productive training event.

Unit: _____ Class Convening Date: _____

Lead Instructor: _____ Telephone: _____

The following items are required to be completed by the Host Unit POC prior to the class convening date or as otherwise specified:

Host unit information provided to Lead Instructor.

- POC Name
- POC Location / Office
- POC Office Telephone Number
- POC Cellular Telephone Number
- Alternate POC Name
- Alternate POC Location / Office
- Alternate POC Office Telephone Number
- Alternate POC Cellular Telephone Number
- Unit OOD/CDO/Security Telephone Number
- Main Classroom Location

Solicitation of prospective students from all local units via official message **NLT 10 weeks** prior to the class convening date. (See page 7 for sample message.)

** Host Unit POCs are encouraged to utilize the CGBI LAMS data report (see page 11 for instructions) to obtain real-time data to assist with identifying prospective students. **

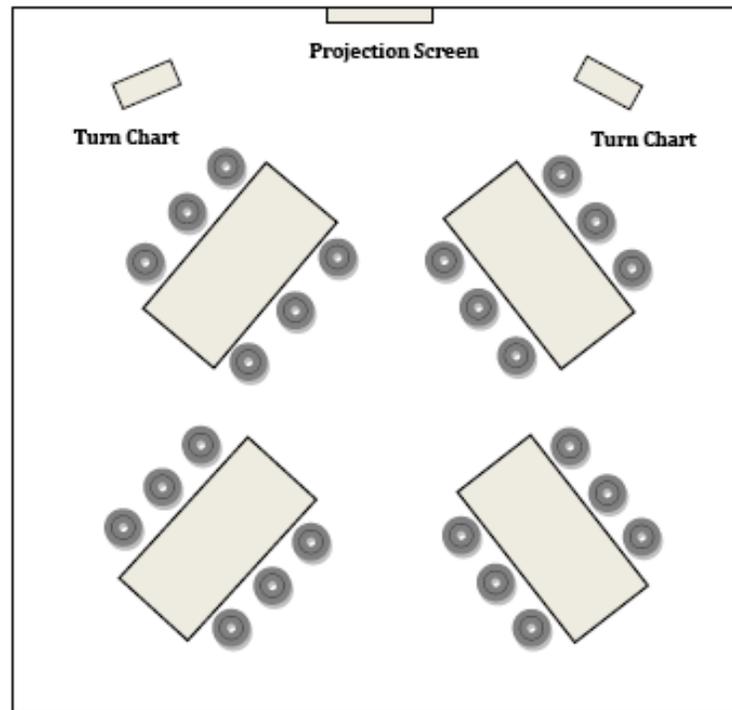
- Prospective students identified / initial class roster completed **NLT six (6) weeks** prior to class convening. Class composition requirements are:
 - **Between 18-24 students** plus four (4) alternates. (Use only template provided by Lead Instructor.)
 - **75% of students from Target Audience.** (See page 4 for attendance criteria.)
- Class roster finalized **NLT five (5) weeks** prior to class convening date.
- Electronic Training Request (ETR) submitted via Direct Access for all students **NLT five (5) weeks** prior to class convening.

ETRs should be entered using the following process. (Each step is a different screen.):

- Access My PortalDirect! (Direct Access)
- From the Main Menu, Select the following options:
 - ***Self Service > Self Service for Commands > Use > Request Training Enrollment***
 - Enter the ***student's EMPLID***, select Search
 - Select ***Search by Course Number***
 - Enter ***340720*** in the Course Number box and select Search
 - Select ***View Available Sessions*** (Leadership & Management School should be the item listed in the description)
 - Locate the applicable Session number based on your class location and convening date and ***select the Session number***
 - Verify you have selected the correct Session, Location, and Start Date and select Submit (No comments are required to be entered)
 - Select OK
- Final** class roster with all required information provided to the LAMS Lead Instructor **NLT five (5) weeks** prior to class convening date. (Use only template provided by Lead Instructor.)
- All Reserve members on class roster contacted to ensure process for obtaining orders to attend the course has been initiated. (All Reserve members must receive orders via their respective District (dxr) to attend the course.)
- Students and parent units notified via official message **NLT 14 days** prior to the class convening of their selection to attend LAMS. (See page 9 for sample message.)
- Active Duty students eligible to receive funding to attend course have received “cost orders” from TQC prior to the class convening date. (See page 5 for amplifying information.)
- Host unit POC arranged to meet with Lead Instructor on Sunday prior to class convening to inspect classroom and review completed checklist.

- Main Classroom reserved.
 - Main Classroom will be utilized the entire week.
- Main Classroom tables and seating arrangement.
 - Main Classroom shall be equipped with four (4) large tables capable of comfortably seating six (6) students per table and six (6) chairs per table, plus an additional table and two chairs for instructor use. A diagram of the Main Classroom layout is included on page 4 of this checklist.
- Additional Break-Out rooms reserved (in addition to Main Classroom).
 - Two (2) break-out rooms are required on Wednesday morning. These rooms shall be furnished with a table and eight (8) chairs each. One (1) breakout room furnished with a table and 12 chairs is required for Thursday morning, Friday morning and Friday afternoon.
- Two (2) Easels (for turn chart paper)
- Four (4) Pads Turn Chart Paper; 27" X 34"; not adhesive backed
- Four (4) Pads White Lined Paper; 8 ½" X 11"
- Four (4) Adhesive-Backed Note Pads; 3" X 3" (e.g. Post-It style)
- PowerPoint Projector
- Computer (SWSIII or Stand-Alone) interfaced with PowerPoint projector
- Administrative assistance to include access to SWSIII computer, printer, copy machine, and telephone for duration of the course.
- Coffee Mess (*optional*) (Host Unit policies regarding coffee messes apply.)
- Command Representative (*if available*) to provide remarks at class convening on Monday and/or graduation on Friday.
- Lead Instructor notified by Host Unit POC upon receipt of course materials.
- All students notified via email of their selection to attend LAMS NLT **one (1) week** prior to class convening. Email should include pertinent information (location, class convening time, uniform, etc.) contained in initial notification message.
- DVD Player (unless computer has DVD capability)
- Suitable Speakers interfaced with computer and DVD player
- Extension Cords for all required electrical equipment
- Pens for all students
- Wall Clock in Main Classroom

Main Classroom Layout



Attendance Criteria:

Target Audience (Active Duty and Reserve):

- E-5 (E-5 personnel shall always receive first priority for available seats.)
- E-6 without prior LAMS completion
- O-1
- O-2
- Civilian Employees (GS 9-11)

Eligible Personnel:

- Civilian Employees (NAF (all), WL (all))
- Coast Guard Auxiliary (FC, VFC, FSO)
- Other federal or state agency employees in positions of leadership

Reserve members have experienced challenges in attending LAMS training to become eligible for advancement to E-6. Many of these challenges are best resolved at the local level. Cooperation between the Lead LAMS Instructor, POC, Senior Reserve Enlisted Advisor and local Silver/Gold Badge at the Host Unit is paramount to support Reserve attendance. Ample notification of Reserve members will provide maximum opportunity for Reservists to attend the course. Reserve members are authorized to utilize IDT, ADT-AT, and ADT-OTD for exportable training. Members should not have attended LAMS training within the past three years.

Solicitation of Prospective Students:

The Host Unit shall solicit prospective students via official message NLT **10 weeks** prior the class convening date. A sample solicitation message is included in this checklist. Target Audience members wishing to attend the class who are not assigned to or collated with the Host Unit who would be required to travel beyond their normal commuting distance may be eligible to receive funding (“cost orders”) to attend the class. These members will be identified on the class roster and may be directed by the LAMS Program Manager to submit a TDY Travel Request Worksheet (CG-2070). The LAMS Program Manager will determine if funding is authorized to permit the member to attend the course. Personnel authorized funding to attend the class will receive orders from TQC.

Notification of Students Selected to Attend LAMS:

The Host Unit POC shall notify all students and their parent units via official message NLT **14 days** prior to the class convening date of their selection to attend LAMS training. A sample notification message is included in this checklist. Information provided to the student should include, at a minimum:

- Inclusive Dates of Training
- Training Location (include building & room number / directions as applicable)
- Reporting Time
- Uniform of the Day (Civilian clothes are no longer authorized for military members)
- Mandatory Homework Requirements
- Expectation that member is TAD for the duration of the course

Commands should recognize that once an individual is selected to attend the course they are considered TAD. Students are exempt from duty-standing requirements for the duration of the course and should not be tasked with additional duties or work assignments. Students that are unable or unwilling to commit their full attention and time to the course should not attend. Students must be present for the entire course in order to graduate. Exceptional circumstances and emergencies that may interrupt a student’s attendance will be handled on a case by case basis. Class hours are 0800-1630 Monday through Friday, unless otherwise noted.

Receipt of Course Materials

Course materials are shipped to the attention of the Host Unit POC approximately 3-5 days prior to the class convening date. The Host Unit POC shall ensure the shipping containers are maintained in a secure location until otherwise directed by the Lead Instructor. In most cases, the Lead Instructor will arrange with the Host Unit POC to have the containers delivered to the Main Classroom on the Sunday prior (1 day prior) to class convening. If the containers arrive damaged or it is apparent some of the course materials are missing, notify the Lead Instructor immediately. Two shipping containers will be mailed. The larger container weighs approximately 125 lbs.

Student Cancellations/Substitutions

All students appearing on the final class roster submitted to the LAMS Lead Instructor will be issued orders (either “cost” or “no-cost”) by TQC to attend the course. The determination of “cost” or “no-cost” is made by the LAMS Program Manager. Regardless of the type of orders issued to the member, all requests for student cancellations and substitutions shall be initiated by the student’s parent unit via CGMS message in accordance with TQC policy. Sample cancellation and substitution messages may be found at <http://www.uscg.mil/hq/tqc/message.asp>. The Host Unit POC shall convey this requirement to the member’s parent unit whenever they receive a request for a cancellation or substitution anytime after the final class roster has been submitted to the LAMS Lead Instructor.

Cancellation of Class

Should it become necessary for the Host Unit to cancel the LAMS class, the Host Unit POC shall contact the Lead Instructor as soon as possible to discuss the pending cancellation. Situations where LDC involvement could potentially mitigate the circumstances resulting in the cancellation (e.g. insufficient target audience or enrollment) will be addressed prior to a final determination on the status of the class. In all cases that could result in cancellation of the class, the LDC must first be notified via the Lead Instructor prior to the Host Unit initiating any additional actions. Following concurrence by the LDC, the Host Unit shall notify all applicable units via official message of the cancellation. (See page 10 for sample message.)

Additional Points of Contact:

LT Jaime Bower, LAMS Section Chief – Jaime.L.Bower@uscg.mil

Ms. Juli Petruzzelli, LAMS Scheduler – Juli.R.Petruzzelli@uscg.mil

Sample LAMS Solicitation Message

R {DTG}

FM {HOST UNIT NAME}

TO {LOCAL UNITS}

BT

UNCLAS //N05351//

SUBJ: LEADERSHIP AND MANAGEMENT SCHOOL (LAMS) TRAINING

A. COMDTNOTE 1510

1. {HOST UNIT NAME} WILL BE HOSTING A LEADERSHIP AND MANAGEMENT (LAMS) CLASS THE WEEK OF {DATE}. LAMS IS A UNIQUE 5 DAY EXPERIENCE IN A RISK-FREE ENVIRONMENT FOR FIRST LINE SUPERVISORS THROUGH AN EXPERIENCE-BASED CURRICULUM. ALL SUCCESSFUL LAMS GRADUATES WILL EARN THREE UPPER-LEVEL COLLEGE CREDITS IN ORGANIZATIONAL DEVELOPMENT FROM THE AMERICAN COUNCIL ON EDUCATION (ACE). LESSON TOPICS INCLUDE SELF-AWARENESS AND LEARNING, EFFECTIVE COMMUNICATIONS, MOTIVATION, PERFORMANCE PROBLEM SOLVING, ETHICAL DECISION MAKING, AND HUMAN RESOURCE MANAGEMENT. THIS COURSE ADDRESSES EIGHT OF THE 28 COAST GUARD LEADERSHIP COMPETENCIES:

A. SELF-AWARENESS AND LEARNING

B. EFFECTIVE COMMUNICATIONS

C. INFLUENCING OTHERS

D. MENTORING

E. TEAM BUILDING

F. DECISION MAKING AND PROBLEM SOLVING

G. CONFLICT MANAGEMENT

H. HUMAN RESOURCE MANAGEMENT

2. UNITS SHOULD USE THE CGBI LEADERSHIP AND MANAGEMENT CUBE TO IDENTIFY ALL E-5'S, BOTH ACTIVE AND RESERVE MEMBERS, WHO HAVE YET TO COMPLETE THIS REQUIREMENT FOR ADVANCEMENT. THESE MEMBERS SHALL BE OFFERED AND SEATED IN THE CLASS BEFORE SEATING OTHER TARGET AUDIENCE STUDENTS INCLUDING E-6'S, O-1'S, O-2'S, AND GS 9-11. ELIGIBLE STUDENTS INCLUDE: WL (ALL), NAF EMPLOYEES (ALL), CG AUX PERSONNEL (FC, VFC, AND FSO), AND OTHER FEDERAL OR STATE AGENCY EMPLOYEES IN POSITIONS OF LEADERSHIP.

3. RESERVE MEMBERS HAVE EXPERIENCED CHALLENGES IN ATTENDING LAMS TRAINING TO BECOME ELIGIBLE FOR ADVANCEMENT TO E-6. MANY OF THESE CHALLENGES ARE BEST RESOLVED AT THE LOCAL LEVEL. COOPERATION BETWEEN THE LEAD LAMS INSTRUCTOR, POC, SENIOR RESERVE ENLISTED ADVISOR AND LOCAL SILVER/GOLD BADGE AT THE HOST UNIT IS PARAMOUNT TO SUPPORT RESERVE ATTENDANCE. AMPLE NOTIFICATION OF RESERVE MEMBERS WILL PROVIDE MAXIMUM OPPORTUNITY FOR RESERVISTS TO ATTEND THE COURSE. RESERVE MEMBERS ARE AUTHORIZED TO UTILIZE IDT, ADT-AT, AND ADT-OTD TO ATTEND THIS TRAINING.

4. MEMBERS INTERESTED IN ATTENDING MUST MEET ALL OF THE FOLLOWING CRITERIA:

A. THE MEMBER MUST BE PRESENT FOR THE ENTIRE COURSE. STUDENTS WHO CANNOT COMMIT TO THE ENTIRE COURSE SHOULD NOT SUBMIT TRAINING

REQUESTS. A STUDENT WHO DOES NOT COMPLETE THE ENTIRE COURSE WILL NOT GRADUATE.

B. STUDENTS ATTENDING LAMS SHALL BE CONSIDERED TAD (NO COST ORDERS) DURING THE TRAINING WEEK. MEMBERS MUST BE COMMITTED TO THIS TRAINING AND SHOULD NOT BE INVOLVED IN OTHER UNIT ACTIVITIES. HOMEWORK AND READING ASSIGNMENTS WILL BE GIVEN EACH NIGHT.

C. MEMBERS SHOULD NOT HAVE ATTENDED LAMS TRAINING WITHIN THE PAST 3 YEARS.

D. ENSURE ATTENDEES ARE WITHIN THEIR MAXIMUM ALLOWABLE WEIGHT STANDARDS (MAWS) IAW COMDTINST M1020.8D (SERIES).

5. CLASS WILL CONVENE MONDAY **{DATE}** PROMPTLY AT 0800. THE TRAINING WILL BE HELD AT **{HOST UNIT NAME AND TRAINING LOCATION}**. GRADUATION WILL BE APPROX 1400, **{DATE}**.

6. UNIFORM WILL BE **{TROPICAL LONG OR ODU}**.

7. SUBMISSION DEADLINE IS **{DATE}**, OR UNTIL SEATS ARE FILLED.

A. SIGNIFICANT EFFORT SHOULD BE MADE TO ENSURE AS MANY MEMBERS WITHIN THE TARGET AUDIENCE POPULATE THE CLASS ROSTER.

B. TRAINING OFFICERS SHALL E-MAIL NAME, PAYGRADE, EMPLID, AND UNIT OF STUDENT(S) DESIRING A SEAT IN THIS CLASS TO THE POC LISTED BELOW. CLASS SIZE IS LIMITED TO 24 STUDENTS.

8. SUBSTITUTIONS MAY NOT BE MADE WITHOUT AUTHORIZATION FROM THE POC.

9. POC: **{HOST UNIT POC NAME}**, **(###) ###-####** OR E-MAIL AT **FFFF.M.LLLL** (AT) USCG.MIL.

10. INTERNET RELEASE AUTHORIZED.

BT

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Sample LAMS Student Notification Message

R {DTG}
FM {HOST UNIT NAME}
TO {STUDENT'S PARENT UNIT}
BT
UNCLAS //N05351//
SUBJ: LEADERSHIP AND MANAGEMENT SCHOOL (LAMS) TRAINING
A. MY {DTG OF SOLICITATION MSG}
1. PER REF (A), THE FOLLOWING STUDENTS HAVE BEEN SELECTED TO ATTEND LEADERSHIP AND MANAGEMENT SCHOOL HOSTED BY {HOST UNIT NAME} FROM {INCLUSIVE COURSE DATES}:
A. NAME RATE/RANK EMPLID UNIT
{MEMBER INFORMATION}
{ADDITIONAL LINES AS NEEDED}
2. THE FOLLOWING ALTERNATES SHOULD BE PREPARED TO ATTEND IN THE EVENT OF A QUOTA CANCELLATION OR VACANCY:
A. NAME RATE/RANK EMPLID UNIT
{MEMBER INFORMATION}
{ADDITIONAL LINES AS NEEDED}
3. TRAINING WILL BE HELD AT {HOST UNIT LOCATION INCLUDING TRAINING SITE, BUILDING, ROOM, ETC.} {PROVIDE DIRECTIONS AS NEEDED} CLASS WILL BEGIN AT 0800 AND END AT 1630 EACH DAY. UNIFORM WILL BE {ODU OR TROPICAL LONG}.
4. STUDENTS ARE CONSIDERED TAD WHILE ATTENDING THIS TRAINING. STUDENTS WILL RECEIVE HOMEWORK AND READING ASSIGNMENTS EACH NIGHT. INDIVIDUALS MUST BE COMMITTED TO THIS TRAINING AND SHALL NOT BE STANDING DUTY OR BE INVOLVED IN OTHER UNIT ACTIVITIES DURING THE TRAINING WEEK. STUDENTS MUST ATTEND THE ENTIRE COURSE TO GRADUATE.
5. POC: {HOST UNIT POC NAME}, (###) ###-#### OR E-MAIL AT FFFF.M.LLLL(AT)USCG.MIL
6. INTERNET RELEASE AUTHORIZED.
BT
NNNN

Sample LAMS Class Cancellation Message

R {DTG}
FM {HOST UNIT NAME}
TO COGARD ACADEMY NEW LONDON CT//LDC//
INFO COGARD TQC CHESAPEAKE VA
COMDT COGARD WASHINGTON DC//CG-132/CG-133//
CCGD {HOST UNIT DISTRICT}//CMC//
BT
UNCLAS //N05351//
SUBJ: CANX LEADERSHIP AND MANAGEMENT SCHOOL EXPORTABLE TRAINING
CLASS CLCVN {CLASS CONVENING DATE AND LOCATION}
A. {REFERENCE APPLICABLE CORRESPONDENCE BETWEEN HOST UNIT POC
AND LAMS LEAD INSTRUCTOR AND/OR LDC POC}
1. REQ TO CANX SCHEDULED LAMS COURSE DUE TO {LIST REASON(S) FOR
CANCELLATION}
2. POC: {HOST UNIT POC NAME}, (###) ###-#### OR E-MAIL AT
FFFF.M.LLLL(AT)USCG.MIL.
BT
NNNN

CGBI LAMS Data Report

This report is refreshed daily and provides current data on LAMS course attendance.

To access the data, follow the steps listed below:

1. Access the Coast Guard Business Intelligence (CGBI) program.
2. Select “Cubes/Reports” at the top of the screen.
3. Select “Leadership & Management School (LAMS)”.
4. Select “launch this report” on the right side of the screen. (A new screen will open.)
5. From the list of available units, select “Commandant”.
6. Ensure the “include subordinate departments” block is checked and select “Finish”.
7. Select “Active”, “Civilian”, or “Reserve”. (To select two or more, press the Control key while making your selection or use the “Select/Deselect all” link to select all categories.)
8. Select “Next”.
9. Select “Excel (without summary)”.
10. Select “Run Report”. (A new screen will open.)
11. Select the “Employee Grade” you wish to search. (To select two or more, press the Control key while making your selection or use the “Select all” link to select all categories.)
12. Select “Finish”.
13. You will be prompted to Open or Save the file. It is recommended you select “Save” to prevent loss of data. If you select Save, chose a location (e.g. Documents) where you want to store the file. (You may also rename the file.)
14. Open the file and highlight all data in Row 6 (column names) by clicking on the number “6” on the far left of the document.
15. Select the “Data” tab at the top of the screen.
16. Select “Filter”. (Drop down arrows should appear for each column name in Row 6.)
17. Use the drop down arrows to select the column(s) you wish to sort (e.g. Department, State, City).
18. Before you can select a particular item from the drop down menu, you must first un-check all the boxes. To do so, click on the checked box next to “(Select All)”, then select the applicable boxes by clicking on each and finally selecting “OK”.
19. This report also lists personnel who have completed the LAMS course. To obtain a list of personnel who have not completed the LAMS course, select the drop down arrow in Column K; “Completed”.
20. Click on the checked box next to “(Select All)” to un-check all the boxes, then select “0” and select “OK”. (This will sort the names of personnel who have not completed LAMS.)
21. Once the data has been sorted, save the file to your local drive and log off of CGBI.

If you encounter difficulty retrieving this data, contact the LAMS Lead Instructor.