



LEADERSHIP DEVELOPMENT CENTER
LEADERSHIP AND MANAGEMENT SCHOOL (LAMS)
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:** _____

Timeline for LAMS Point of Contact (POC)

- In initial communications with the Lead Instructor assigned to your class, provide the following information.

Your contact information:

- POC name
- POC location / office
- POC office telephone number
- POC cellular telephone number

General information

- Unit OOD/CDO/Security telephone number
- Confirmed main classroom location

Alternate POC information (for whenever you are away):

- Alternate POC name
- Alternate POC location / office
- Alternate POC office telephone number
- Alternate POC cellular telephone number

- NLT 10 weeks prior to the class convening date: Send out a solicitation for prospective students via email to local unit's Administrative Official Information Exchange (OIX) command shared mailbox. Mailboxes are named with the following template: CMD-SMB-CG-unit (see page 8 for a sample message).
- NLT 6 weeks prior to class convening date: Prospective students are identified and the class roster is completed. Submit the class roster to the Lead Instructor.
- NLT 14 days prior to class convening date: Notify the parent units of enrolled students via OIX of their selection to attend LAMS (see page 9 for sample message).
- Thursday prior to the class convening date: Receive 2 cases of course materials and place in classroom. Notify the Lead Instructor if the materials were or were not received.
- Sunday prior to class convening date: Meet with Lead Instructor to inspect classroom, deliver course materials, and review completed checklist.

POC guidance for building the class roster

Prospective students can obtain information about the class from the following sources:

- Leadership Development Center (LDC) LAMS website:
<http://www.uscga.edu/subsites/ldccourses.aspx?id=2743>
 - Course description, videos, pictures, student eligibility requirements.
- Training Quota Management Center (TQC) Portal Page:
<https://cg.portal.uscg.mil/units/forcecom/tqc/Pages/Home.aspx>
 - Course description, class convening dates and locations, POC information, student eligibility requirements. See “C” School Schedule and TQC Shared Documents.
- Your unit’s solicitation email: (see page 8)
- From their Chiefs through communications on the Silver Badge Network

Prospective students will be instructed from these sources to contact the POC when they route their Electronic Training Requests (ETRs).

Through this contact with the prospective student, gather the information to build the roster. Use the Excel Spreadsheet provided by the LAMS Scheduler or Lead Instructor.

Roster information needed:

- Member’s name
- Member’s home unit
- Member’s duty status (AD, RES, CIV, AUX, etc)
- Member’s rating
- Member’s pay grade
- Member’s email (home email for RES)
- Is the member commuting outside their normal commuting distance to attend?
An active duty student travelling outside their normal commuting distance is entitled to cost orders (see Good to Know section for more information); only 4 cost orders are allocated to each class.
- Has the member submitted an ETR through their parent unit Training Officer? (A member must have an ETR in Direct Access to receive orders)

When building the roster, keep in mind the class composition requirements:

- **Between 18-24 students.**
- **Goal is 100% of students come from the Target Audience.**
- **Maximum attendance from local AOR, minimize need for cost orders.**
- **No priority should be given to Active Duty or Reserve over the other.**
- **LAMS School Chief has final approval of all attendance requests.**

Target Audience by Precedence (Active Duty and Reserve):

- E-5 that requires class for advancement
- E-4 above the cut for advancement

Other Eligible Personnel as Approved by School Chief on Case by Case Basis:

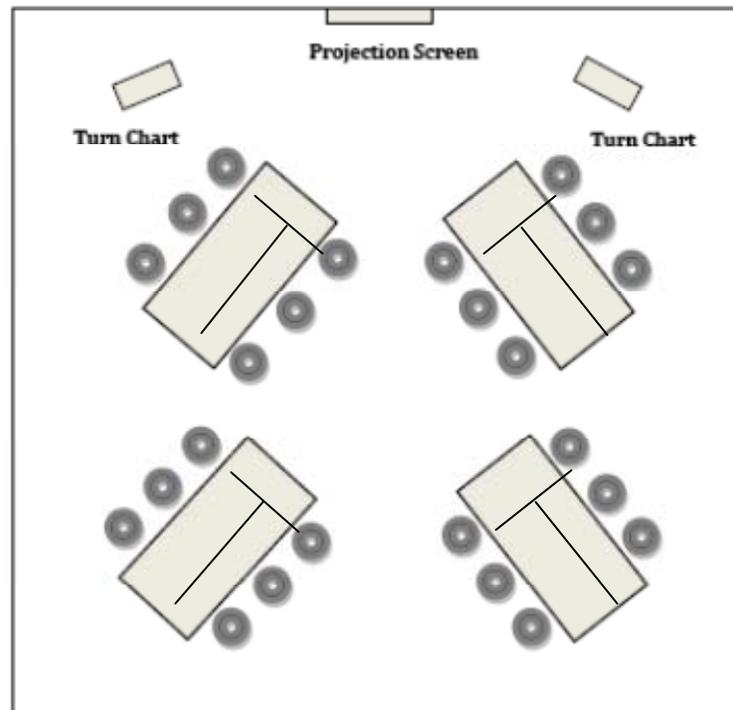
- E-5 & E-6 that have not attended in the last three years
- Coast Guard Civilian Employees (GS 9-11) (continued on next page)

- O-1 & O-2 (regardless of accession training; if they have attended they will have a course code 340720 in TMT. ROCI officers should take priority over other Junior Officers because they have not received LAMS training.)

POC guidance for the classroom

Main Classroom:

- Needs to be reserved for the entire week.
- Equipped with sufficient tables and chairs to accommodate a pod orientation for students (comfortably seating 6 students per pod), plus an additional table and two chairs for instructors. A diagram depicting a recommended layout is shown below.
- A functioning wall clock.



Break-Out rooms:

Two (2) break-out rooms are required on Wednesday morning, Thursday morning, Friday morning and Friday afternoon. These rooms shall be furnished with a table and 8-12 chairs each.

Host-unit provided materials:

- Two (2) Easels (for turn chart paper)
- Four (4) Pads Turn Chart Paper; 27" X 34"
- 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
- Suitable speakers interfaced with computer
- Extension cords for all required electrical equipment
- Pens for all students
- 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 and/or closing. Days and times to be arranged with Lead Instructor.

Good-to-know information

Reservists

At times, 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. It is an advancement requirement for both Active Duty and Reserves; no priority should be given to one group over the other. 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.

Cost orders for travel exceeding commuting distance within the local area

Those attending training within the local area (50 mile radius of member's PDS) are entitled to reimbursement for travel exceeding their normal commuting distance. They are not entitled to lodging or M&IE, but count as cost TDY orders. Reference: DHS Travel policy, Chapter 7.5 Local Travel. <http://dhsconnect.dhs.gov/org/comp/cfo/travel/Pages/default.aspx>

Cost orders are limited per class. In order to make the most efficient use of cost orders, a member travelling locally is encouraged to use an assigned GV for travel to and from class.

Notification of Students Selected to Attend LAMS:

The Host Unit POC shall notify all students and their parent units via email (see page 9) NLT **14 days** prior to the class convening date of their selection to attend LAMS training. Please forward a copy to the Lead Instructor for visibility. 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
- Mandatory Homework Requirements
- Expectation that member is TDY for the duration of the course

Commands should recognize that once an individual is selected to attend the course they are considered TDY. 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.

Having Difficulty Filling the Roster?

Use the CGBI Leadership and Management cube to identify candidates for the class. Follow the instructions on page 11 to generate a list of E-5's in your local area who have not taken LAMS. You can then contact these individuals directly or contact their CMC to generate interest.

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 placed in the Main Classroom on the Sunday morning prior to class start unless otherwise directed by the Lead Instructor. 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 TQC and the LAMS School Chief. 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 Admin OIX email to CMD-SMB-CG-TQC. Sample cancellation and substitution messages may be found at:

<https://cg.portal.uscg.mil/units/forcecom/tqc/Pages/Message-Templates.aspx> .

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 email of the cancellation. (See page 10 for sample message.)

Additional Points of Contact:

LTJG Chris Reimer, LAMS School Chief – Christopher.P.Reimer@uscg.mil

CWO3 Russell Tippets, LAMS Scheduler – Russell.C.Tippets@uscg.mil

Sample LAMS Solicitation Email

From: CMD-SMB-XXX
To: CMD-SMB-XXX; CMD-SMB-XXX; CMD-SMB-XXX
Subject: Leadership and Management School Student Solicitation

1. {Host unit name} will be hosting a Leadership and Management School (LAMS) class the week of {date}. LAMS is a unique five day experience for first line supervisors and mid-level managers through an experience- based curriculum. All successful LAMS graduates will earn three upper-level college credits in leadership from the American Council on Education (ACE).
2. Units should use the CGBI Leadership and Management cube to identify candidates for the class. The target audience (Active Duty and Reserve) and hierarchy for issuance of quotas is as follows:
 - a. E-5 that require class for advancement
 - b. E-4 above the cut for advancement
 - c. E-5 & E-6 that have not attended in the last three years
 - d. Coast Guard Civilian Employees (GS 9-11)
 - e. O-1 & O-2 (regardless of accession training)
3. 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. A student who does not complete the entire course will not graduate.
 - b. Students attending LAMS shall be considered TDY during the training week and shall not be assigned duty. 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 M1020.8 (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 ODU.
7. Submission deadline is {6 weeks prior to class convening 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 submit an ETR for students requesting enrollment AND e-mail name, emplid, paygrade, and unit of student(s) desiring a seat in this class to the POC listed below. Also make note if student (s) will be travelling beyond their normal commuting distance to attend the class.
8. Substitutions may not be made without authorization from the POC.
9. POC: {host unit POC name, phone number and email}

Sample LAMS Student Notification Email

From: CMD-SMB-XXX
To: CMD-SMB-XXX; CMD-SMB-XXX; CMD-SMB-XXX
Subject: Leadership and Management School Student Notification

Ref: My email {date} Leadership and Management School Student Solicitation.

1. 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.

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, phone number and email}

Sample LAMS Class Cancellation Email

From: CMD-SMB-XXX
To: CMD-SMB-CG-TQC
Cc: CMD-SMB-CG-LDC; CMD-SMB-COMDT-CG1
Subject: Leadership and Management School Class Cancellation

Good morning,

- 1 . Request to cancel LAMS course scheduled for {inclusive dates} due to {list reason (s) for cancellation}
- 2 . POC: {host unit POC name, phone number and email}

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.