



CRM Instructional Model Manager Assist Visit Checklist

CREW RESOURCE MANAGEMENT
*"Supporting Mission Effectiveness Through
Enhanced Aircrew Performance"*

Naval Schools of Aviation Safety
181 Chambers Avenue, Suite A
Pensacola, Florida 32508-5221
<https://www.netc.navy.mil/nascweb/crm/crm.htm>

August 2014 Revision

Curriculum Program Manager _____ Unit _____
IMM Team Member(s) _____ Date _____

(*) Item is considered a critical item, necessary for a command's CRM program to be fully compliant. These items are also bold faced.

Excellent (E) – Item is recognized as a CRM program best practice. **2 pts**
Satisfactory (S) – Item meets the requirements of the CNAF instruction. If discrepancies were discovered, they were noted **and** corrected (if able) during the visit. **1 pt**
Unsatisfactory (U) – Item does not meet requirements of the CNAF instruction. **0 pts**

(#) Item is considered a benefit to the CRM Program.

Excellent (E) – Item is recognized as a CRM program best practice. **2 pts**
Satisfactory (S) – Item was discussed as being beneficial to a CRM program and plans exist to incorporate item into future CRM administration or training. **1 pt**
Not Observed (NOB) – Item is not required by current instruction and it is not currently practiced.

PROGRAM MANAGEMENT

At a minimum, the NATOPS jackets of the CO (or OIC), XO, PM, one CRMI, one CRMF and two students of each designator will be reviewed. NATOPS review of Section II, Part C: Enclosure (3), OPNAV 3710/7, CRMI designation letter, and ground training extension letter; Section III, Part A: CRMF designation letter. Match logbook entries to CRM flight/simulator training documented on Enclosure (3).

Program Manager (PM)

1. *** Does the PM have all current applicable instructions on hand?** E S U

Ref: CNAFINST 1542.7A

Comments: _____

Excellent – The PM not has only the current CNAF instruction, but has developed and disseminated their own model/wing/command instruction that states certain requirements for all CRM matters. Documents are typically in a turnover binder.

Satisfactory – The PM has the current CNAF on hand and has distributed it to other commands under his/her responsibility.

Unsatisfactory – The PM does not have the CNAF instruction.

2. *** Is the PM a graduate of the IMM's CRM Instructor Course?** E S U

Are course certificates on file with the command?

Ref: CNAFINST 1542.7A, para 7.f

Comments: _____

Excellent – The PM has copies of his/her certificate and designation letter on hand and copies of all community CRMIs certificates and designations and are easily referenced. Documents are typically in a turnover binder.

Satisfactory – The PM has his/her certificate on hand, and is easily referenced.

Unsatisfactory – The PM does not have a copy of his/her certificate. No proof of attending the CRMI course exists. IMM will attempt to research attendance and provide replacement certificate if available.

3. * **Is the PM designated in writing by the Curriculum Model Manager?** E S U

Ref: CNAFINST 1542.7A, para 8.f.(1), Encl (1), para 10

Comments: _____

Excellent – PM designation is easily referenced and all designations of assistants (as needed) are easily referenced as well. Documents are typically in a turnover binder.

Satisfactory – PM is able to reference his/her designation letter

Unsatisfactory – PM does not have a designation letter, or cannot find his designation letter.

4. * **Does the PM maintain the required number of designated CRMIs/Fs?** E S U

Ref: CNAFINST 1542.7A, para 7.f.(4); Encl. (2). h.; Encl. (4)

Comments: _____

Excellent – PM has above and beyond the required number of instructors and facilitators and has a plan for their training and relief. All CRMIs and CRMFs are easily referenced. Documents are typically in a turnover binder.

Satisfactory -The PM has required number of CRMIs and CRMFs,.

Unsatisfactory – PM does not have the required number of CRMIs and CRMFs.

5. * **Does the PM maintains a current POC listing of all CRM Unit Level** E S U

Ref: CNAFINST 1542.7A, para 8.f. (10)

Managers (ULM), CRMIs and Fs, which includes: name, command, phone number, email and current billet?

Comments: _____

Excellent – PM establishes contact on a regular basis and maintains an email audit trail of correspondence, (i.e. .pst file). PM has dates on when ULMs, CRMIs/Fs are no longer available (PRD). Documents are typically in a turnover binder.

Satisfactory – The PM has list of points of contact.

Unsatisfactory – PM does not have a POC listing and IMM advised PM to create a POC list.

6. * **Does the CMM/PM conduct required annual assist visits for fleet activity CRM programs every 12 -18 months?** E S U

Ref: CNAFINST 1542.7A, para 7.f. (6).

Comments: _____

Excellent – Regular assist visits evaluating instructional technique with CRMIs and Fs while advising the Unit Level Manager (ULM) on unit program management are performed on a 12 to18 month cycle. Previous assist visit results are easily referenced. Documents are typically in a turnover binder.

Satisfactory – PM conducts assist visits IAW CNAF with standardized checklist. Non-Collocated PM utilizes documented ULM self-assessments.

Unsatisfactory – One or more of the CNAF requirements are not met.

7. * **Does the PM coordinate with the NATOPS model manager to attend NATOPS conferences and promote CRM integration into T/M/S procedures?** E S U

Ref: CNAFINST 1542.7A, para 7.f. (5); Encl. (4): “CMM shall be the NATOPS MM.”

Comments: _____

Excellent – Thorough and current CRM integration exists in community CRM/NATOPS procedures. PM attends NATOPS conference, provided inputs and maintains notes of previous NATOPS conferences as it relates to community CRM issues addressed. Notes of previous NATOPS conferences are easily referenced. Documents are typically in a turnover binder.

Satisfactory – PM attended/provided inputs for the NATOPS conference and/that address(ed) CRM issues.

Unsatisfactory – PM does not attend/provide inputs for the NATOPS conference.

8. # Does CMM/PM maintain copies of previous IMM assist visits? E S NOB

Comments: _____

Excellent – Copies of previous assist visits are easily referenced. Documents are typically in a turnover binder.

Recommendations from previous assist visits have been fully incorporated into program.

Satisfactory – Previous assist visits are on file.

NOB – PM does not have previous assist visits on file and IMM advised PM to start maintaining a record of assist visits.

CRM Instructor (CRMI)

9. * Are all CRMIs NATOPS qualified 0-3/E-5 or above and have successfully completed the IMM's CRM Instructor Course, T/M/S CRMF Course, and are designated by the CMM in T/M/S? E S U

Ref: CNAFINST 1542.7A, Encl. (1), para 6.

Comments: _____

Excellent – Local CRM SOP addresses minimum requirements for qualification. PM maintains copies of all CRMI designations and are easily referenced. Documents are typically in a turnover binder.

Satisfactory – Requirements set forth by CNAF are followed.

Unsatisfactory – One or more of CNAF requirements are not met.

CRM Facilitator (CRMF)

10. * Are all CRMFs T/M/S designated by the unit level commanding officer to conduct CRM recurrent ground training, and flight evaluations? E S U

Ref: CNAFINST 1542.7A, para 7.g. (3), Encl. (1), para 11.

Comments: _____

Excellent – Local CRM SOP addresses minimum requirements for qualification. PM maintains copies of all CRMF designations and are easily referenced. Documents are typically in a turnover binder.

Satisfactory – Requirements set forth by CNAF are followed.

Unsatisfactory – One or more of CNAF requirements are not met.

CRM Unit Level Manager (ULM)

11. * Are all CRM ULMs NATOPS qualified 0-3 or above, designated as a CRMF and have been designated as ULM by the unit level commanding officer in T/M/S? E S U

Ref: CNAFINST 1542.7A, para 8.g.(1); Encl. (1), para 12.

Comments: _____

Excellent – Local CRM SOP addresses minimum requirements for qualification. PM maintains copies of all ULM designations and are easily referenced. Documents are typically in a turnover binder.

Good – Requirements set forth by CNAF are followed.

Unsatisfactory – One or more of CNAF requirements are not met.

Civilian Aircrew Members/Instructors

12. * Are all civilian staff conducting CRM ground/simulator/flight training qualified as a CRMI or F? E S U

Ref: CNAFINST 1542.7A, 7.i.

Comments: _____

Excellent – PM has copies of all of civilian CRMI or F designation letters and are easily referenced. Documents are typically in a turnover binder.

Satisfactory – Civilians that are conducting initial ground training are designated as CRMI. Civilians that are conducting annual re-currency ground training are designated as CRM-I or F. Civilians are maintaining the same CRM qualifications as uniformed aviators as applicable.

Unsatisfactory – One or more of CNAF requirements are not met.

13. * Are all civilians conducting flight training maintaining CRM qualifications as applicable? E S U

Ref: CNAFINST 1542.7A, 7.i.

Comments: _____

Excellent – PM has documentation of civilians attending CRM initial and annual training. Documents are typically in a NATOPS jacket or turnover binder.

Satisfactory – Civilians are maintaining the same CRM qualifications as uniformed aviators as applicable.

Unsatisfactory – One or more of CNAF requirements are not met.

Program Management/Records

14. # Does the Program Manager forward detailed copies of contractor-developed CRM material to the IMM for review and concurrence. E S NOB

Ref: CNAFINST 1542.7A, 8. (8).

Comments: _____

Excellent – PM has assisted in the design or contributed significantly to the contractor developed CRM training material.

Satisfactory – PM has forwarded T/M/S specific contractor developed CRM training material to IMM for review and concurrence..

NOB – PM does not forward or posses contractor developed material.

15. # Does the Program Manager maintain a turnover binder? E S NOB

Comments: _____

Excellent – PM maintains a thorough turnover binder with all applicable information and provides for seamless turnover.

Satisfactory – PM maintains a turnover binder with some applicable information.

NOB – No turnover binder exists. IMM advised PM on the creation and maintenance of a binder.

TRAINING

Review all media and training materials used for initial and refresher training.

1. * **Is CRM ground and flight training documented correctly?** E S U

Ref: CNAFINST 1542.7A, para 7.m, 9, 10, Encl. (3)

Comments: _____

Excellent – All documentation is done correctly with specific tracking and training gates. Tracking is typically accomplished using SHARP.

Satisfactory – Training is documented correctly.

Unsatisfactory – Training is not documented correctly.

2. * **Are extensions (when applicable) documented properly?** E S U

Ref: CNAFINST 1542.7A, para 7.k, 7.m, and Encl. (3)

Comments: _____

Excellent – Documentation is accurate with specific training plan for expired aviators upon return from det/deployment.

Satisfactory – Documentation is done correctly.

Unsatisfactory – No extension exists for expired aviators.

3. * **Have personnel who perform duties as aircrew in more than one T/M aircraft received initial CRM in each T/M aircraft? Has full annual recurrency training been conducted in at least one T/M aircraft and modified re-currency training been conducted for all other T/M aircraft?** E S U NOB

Ref: CNAFINST 1542.7A, para 7.e., Encl. (2) para 1.d

Comments: _____

Excellent – A specific training plan for multiple T/M/S exists.

Satisfactory – Training is done IAW CNAF.

Unsatisfactory – Training is not conducted IAW CNAF. PM ensures training will be revamped to be compliant with CNAF requirements.

NOB – Unit maintains only one T/M/S.

4. * **Does the PM ensure CRMF training is conducted by a CRM-I?** E S U

Ref: CNAFINST 1542.7A, 7.g., 7.g. (1), and Encl. (2) g.

Comments: _____

Excellent – PM has a list of all current CRMFs, with a record of facilitator training attendance and the CRMI who validated their training and is easily referenced. Documents are typically in a turnover binder.

Satisfactory – Facilitator training is conducted by CRMI.

Unsatisfactory – Facilitator training is not conducted by a CRMI or no training record exists.

5. * **Does the PM maintain and disseminate a standardized CRM training program for their T/M/S units?** E S U

Ref: CNAFINST 1542.7A, para 8.f. (2).

Comments: _____

Excellent – PM disseminates regularly updated and customized T/M/S specific materials.

Satisfactory – PM has standardized briefs that are disseminated to the units.

Unsatisfactory – PM does not provide or disseminate training materials to T/M units.

6. * **Is the CRM Facilitator Course T/M/S specific and include: CRM history, seven critical skills, CNAFINST 1542.7A, program administration, CRM instruction and evaluation techniques?** E S U

Ref: CNAFINST 1542.7A, para 7.g (1), 8.f.(3)

Comments: _____

Excellent –CRMF course is IAW CNAF guidance and is based on IMM curriculum.

Satisfactory – Course meets requirements set forth by CNAF.

Unsatisfactory – PM course does not meet requirements set forth by CNAF.

7. * **Do the prospective CRMFs conduct and grade a CRM flight evaluation under the instruction of a CRM?** E S U

Ref: CNAFINST 1542.7A, para 7.g (1)

Comments: _____

Excellent –Prospective CRMFs conduct and grade a CRM flight/simulator evaluation under instruction and has proper documentation in the NATOPS jackets.

Satisfactory – Prospective CRMFs conduct and grade a CRM simulator event evaluation under instruction.

Unsatisfactory – Prospective CRMFs do not conduct and grade a CRM flight or simulator event evaluation under instruction

8. * **Does the PM review and update the CRM curriculum to reflect current missions, aircraft configuration, and integration of CRM behavioral skills?** E S U

Ref: CNAFINST 1542.7A, para 8.f. (7)

Comments: _____

Excellent – Scheduled updates occur based on elapsed time period (at least annually), new equipment, new procedure, HAZREPs, or mishaps with respect to currency, relevancy, and credibility.

Satisfactory – Course is updated as needed.

Unsatisfactory – Course is out of date or nonexistent and requires a review.

9. * **Is CRM initial and annual ground training tailored toward various experience levels?** E S U

Ref: CNAFINST 1542.7A, para 7.c, 7.d., and 7 h.

Comments: _____

Excellent – Curriculum is tailored to different roles such as: student (initial), various experienced aviator levels (annual), and instructor.

Satisfactory –Separate curriculums exist for initial and annual.

Unsatisfactory – No specific differentiated training exists. Course needs more tailoring to diverse aviation experiences.

10. # **Is the PM collecting CRM trends from the fleet?** E S NOB

Ref: CNAFINST 1542.7A, para 7.d.

Comments: _____

Excellent – PM has collect and incorporated recent T/M/S CRM trends and incorporated them into the different levels of ground training.

Satisfactory – PM has collected some recent trends and plans to incorporate them into ground training lectures.

NOB – PM does not collect recent trends from the community.

11. # Observe a local command CRM Program's training and documentation.

Comments: _____

12. # Observe CRM training being conducted (if available) (class/sim/flight).

Comments: _____

At this time, the IMM will count the number of points accumulated for your program management and training, and based on percentage, evaluate how your program is fairing compared to previous assist visits and current CRM best program practices.

Excellent – (100%-85%) The CRM program in place is well exceeding CNAF requirements.

Satisfactory – (84%-45%) The CRM program is well established and giving relevant and important CRM training and maintaining CNAF compliance.

Unsatisfactory – (44% - 0%) Program is failing to meet CNAF requirements.

*****NOTE: A TOTAL OF FOUR (4) OR MORE UNSATISFACTORY GRADES REGARDLESS OF THE NUMBER OF EXCELLENT GRADES WILL RESULT IN AN OVERALL GRADE OF UNSATISFACTORY.**

Program Management Sub Category				Points
Number of E		x 2	=	
Number of S		x 1	=	
Number of U		x 0	=	0
Total # Grades		Total Earned	=	
Total Poss. (x 2)		PM Grade	=	%

Training Sub Category				Points
Number of E		x 2	=	
Number of S		x 1	=	
Number of U		x 0	=	0
Total # Grades		Total Earned	=	
Total Poss. (x 2)		Training Grade	=	%

Overall	Points	Possible		
PM Total			100-85%	Excellent
Training Total			84-45%	Satisfactory
Final Totals			44-0%	Unsatisfactory
Final Grade	%			

Additional Notes: _____
