



**NORTH ATLANTIC TREATY ORGANISATION**



**Supreme Allied Commander, Europe  
B-7010 SHAPE  
Belgium**

**Supreme Allied Commander, Transformation  
Norfolk, Virginia 23551-2490  
United States of America**

SH/J7TTX/PV/ TT-xxx

5000/TPX/0310/TT-7909/Ser: NU

**Bi-SC 75-7**

**EDUCATION and INDIVIDUAL  
TRAINING  
DIRECTIVE  
(E&ITD)**

**xx March 2013**

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BI-SC DIRECTIVE  
NUMBER 75-7

xx MAR 2013

**EDUCATION and INDIVIDUAL TRAINING DIRECTIVE**

This directive supersedes Bi-Strategic Command 75-7 Directive dated 27 May 2009.

- REFERENCES:
- A. MC 458/2, NATO Education, Training, Exercise and Evaluation (ETEE) Policy (Final), 12 October 2009
  - B. Bi-SC 80-90, NATO Task List (NTL), 16 November 2007
  - C. MC 477, Military Concept for the NATO Response Force, (Final), 18 June 2003
  - D. MC 389/2, MC Policy on NATO's Combined Joint Task Force (CJTF), dated 4 May 2004
  - E. Bi-SC Directive for the handover of Collective Training and Exercise Responsibility from SHAPE to HQ SACT, dated 30 April 2012

- 1. Applicability.** This directive is applicable to Headquarters, Supreme Allied Commander Transformation and formations of the NATO Command Structure (NCS) and the NATO Force Structure (NFS).
- 2. Interim Changes.** Interim changes are authorized only when approved by COS SHAPE and COS HQ SACT.
- 3. Purpose.** This directive is the overarching document for Education and Individual Training (E&IT), providing strategic guidance on responsibilities, programming, planning, and standard procedures for execution of E&IT to ensure a coordinated approach throughout NATO in order to provide trained and ready forces for current and future operations.
- 4. Supplementation.** Supplementation is not authorised. Any HQ wishing to modify or amplify this directive is to notify the lead proponent at SHAPE or HQ SACT.
- 5. Publication Updates.** Updates are authorized when approved by COS SHAPE and COS HQ SACT. The Bi-SCs will ensure an appropriate revision period.

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Chief of Staff

C A Johnstone-Burt CB OBE  
Vice Admiral, GBR N  
Chief of Staff

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HQ AIRCOM  
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NATO Defence College (NDC)  
NATO CIS School (NCISS)  
NATO Maritime Interdiction Operational Training Centre (NMIOTC)

Command & Control COE (C2-COE / NLD)  
Centre for Analysis & Simulation for the Preparation of Air Operations COE (CASPOA / FRA)  
Cooperative Cyber Defence COE (CCD COE / EST)  
Civil Military Cooperation COE (CCOE / NLD)  
Combined Joint Operations from the Sea COE (CJOS COE / USA)  
Confined and Shallow Waters COE (COE CSW / DEU)  
Cold Weather Operations COE (COE-CWO / NOR)  
Counter Improvised Explosive Devices COE (COE C-IED / SPA)  
Defence Against Terrorism COE (COE-DAT / TUR)  
Energy Security COE (ENSEC COE / LTU)  
Explosive Ordinance Disposal COE (EOD COE / SVK)  
Human Intelligence COE (HUMINT COE / ROU)  
Joint Air Power Competence Centre COE (JAPCC / DEU)  
Joint Chemical Biological Radiation & Nuclear Defence COE (JCBRN Defence COE / CZE)  
Military Engineering COE (MILENG COE / DEU)  
Military Medicine COE (MILMED COE / HUN)  
Modelling and Simulation COE (M&S COE / ITA)  
Naval Mine Warfare COE (NMW COE / BEL)

Information:



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MNC NE

1 DEU/NLD Corps

NRDC Italy

NRDC Spain

NRDC Turkey

NSCC

NSHQ

STRIKFORNATO

FRA MARFOR

ESP MARFOR

GBR MARFOR

ITA MARFOR

Austrian Armed Forces International Training Centre (AUTINT / AUT)

Peace Support Operations Training Centre (PSOTC / BIH)

Bulgarian National Military University/Department of Foreign Languages (BGR)

Cairo Regional Centre for Training on Conflict Resolution and Peacekeeping in Africa (CCCPA / EGY)

Finnish Defence Forces International Centre (FINCENT / FIN)

German Armed Forces United Nations Training Centre (DEU)

Sachkhere Mountain-Training School (GEO)

Multinational Peace Support Operations Training Centre (MPSOTC / GRC)

International Institute of Humanitarian Law (ITA)

Armed Forces Language Institute Jordan (JOR)

Peace Operations Training Centre (POTC / JOR)

The Kazakh Training Centre of the Defence Institute of the Ministry of Defence (KAZCENT / KAZ)

Regional Department of Defence Resources Management Studies (DRESMARA / ROU)

Crisis Management and Multinational Operations Department (CMMOD / ROU)

Armed Forces Academy (SVK)

PfP Language Training Centre (SVN)

Swedish Armed Forces International Centre (SWEDINT / SWE)

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Armed Forces International Command Training Centre (SWISSINT / CHE)

PfP Training Centre Turkey (TUR)

International Peace and Security Centre (UKR)

United Kingdom Defence Academy (GBR)

Naval Postgraduate School (NPS / USA)

Moldovan Continuous Training Centre (MDA)

Regional Predeployment Training Centre (GEO)

Latvian National Defence Academy (LNDA) via Latvian NLR to ACT

Internal –

Action:

MPD Staff Element Norfolk (MPDSENF)

SACT Representative Europe (STRE)

Staff Element Europe (SEE)

DCOS JFT

ACOS JETE

Branch Head JETE/ETEE Plans&Policy

Branch Head JETE/EIT

Branch Head JETE/TREX

Joint Warfare Centre (JWC)

Joint Force Training Centre (JFTC)

Joint Analysis & Lessons Learned Centre (JALLC)

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ACOS J1

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National Liaison Representatives at ACT (NLR)

Partner National Liaison Representatives (PNLR)

SACEUR

DSACEUR

SHAPE NMRs

SHAPE PNMRs

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**Recommendations for Changes to the Bi-SC 75-7 E&ITD.** The Comment format below is to be used to record and report any recommendations/changes to the Bi-SC 75-7 E&ITD. Users are requested to submit recommendations/comments to the appropriate POC; ACO users to SHAPE Force Readiness Division; ACT users to ACOS Joint Education, Training & Exercise (JETE) and partner users to Military Partnerships Directorate (MPD).

<b>Comments Provided by:</b>			(Enter HQs/Office/Name/Contact details)	<b>Date:</b>
<b>Serial</b>	<b>Chap/ Annex<sup>1</sup></b>	<b>Para<sup>2</sup></b>	<b>Comment/Recommendation<sup>3</sup></b>	<b>Rationale/Justification</b>
001				
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- 
1. Identify the parts or annex. Examples: Part 3; Annex D
  2. Examples: 2.4.c.(1); 6.5.
  3. Including proposed words, reference, etc; if extensive, attach separate document with file name referenced to Comment Serial.

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**Log of Changes and Updates.**

Date	Para	Change	Remarks

## 1. INTRODUCTION

**1.1 General.** NATO aims at providing nations' and partners' personnel with high quality Education and Training (E&T) opportunities. This is achieved by aligning NATO's E&T with International Educational Standards. NATO relies upon Nations to address Education and Individual Training (E&IT) requirements that are common across the Alliance. Those E&IT requirements that are unique or specific to NATO are addressed by training programmes and activities.

**1.2 Aim.** This Directive enables nations and partners to align their modules and courses with these standards thus ensuring an effective education and training landscape throughout NATO, nations and partners. It furthermore provides guidance on

- a. NATO's E&IT, following a requirement driven approach based on the ideas of centralized command, executed on behalf of SACT by DCOS JFT, and decentralized organization and coordination executed by respective Department Heads (DH) and Education and Training Institutions.
- b. Quality Assurance (QA), providing a standard of training aligned with International Educational Standards.
- c. NATO's E&IT modules and courses, and how they are to be analysed, designed, developed, implemented and evaluated.

### 1.3 Scope

- a. This Directive is focused on education and individual training and does not include elements of collective training and exercises, which can be found in Bi-SC Directive 75-3.

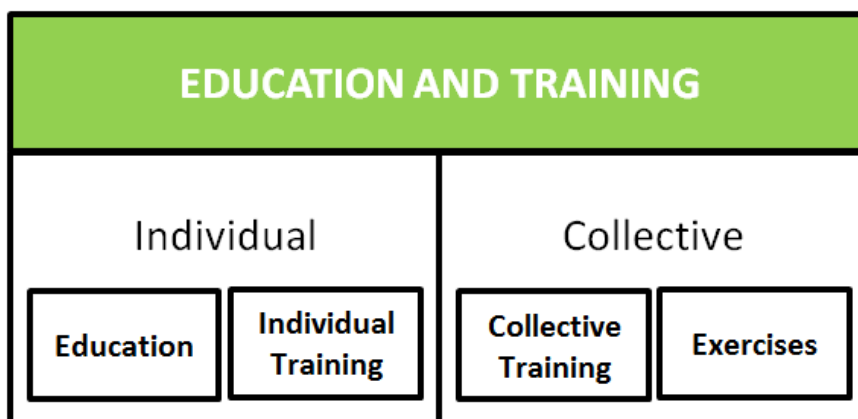


Figure 1-1 – Education and Training Definition

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- b. It is applicable to all NATO Education and Training Facilities (NETFs) and those Centres of Excellence (COEs), Partnership Training and Education Centres (PTECs) and National Training Institutions (NTI) that provide NATO E&T. Allies and partners are encouraged to align with/adopt the principles of this directive in the management of national courses, modules, programmes, in order to enhance interoperability.
- c. E&IT in NATO is the systematic instruction of individuals in subjects that will enhance their knowledge and develop competencies required to serve in a NATO billet or participate in a NATO operation. This comprises the instructional activities and competency based activities – these are not mutually exclusive and are often blended together to achieve the desired objective.
- d. Education is the systematic instruction of individuals in subjects that will enhance their knowledge and skills, and develop competencies, and support life-long personal development.
- e. Individual training comprises the instructional activities for individuals that provide the skills, knowledge and competencies required for the performance of assigned duties.

## 2. INDIVIDUAL TRAINING AND EDUCATION PROGRAMME (ITEP) CYCLE

**2.1 Requirements.** Defined and prioritized requirements are the starting point for the programming of individual training solutions to these requirements.

a. **Standing Requirements** are contained and updated via the NATO Command Structure (NCS) PE and CE Job Descriptions, and yearly NATO Force Structure (NFS) and partner E&IT participation. The Bi-SC Requirements Steering Group (BRSG) will initiate the process of defining training requirements for inclusion in SACEUR’S Annual Guidance on Education, Training, Exercise and Evaluation (SAGE), (detailed in Bi-SC Directive 75-2).

b. **New Requirements** are formulated based on shortfalls identified by Heads of State and Government (such as the “Lisbon and Chicago Summit Tasks”) and Operational Commanders or by the introduction of new capabilities.

c. **Individual Training Requirements** derive from the sources mentioned above. They are prioritized within the SAGE (ANNEX A).

### 2.2 Individual Training and Education Programme Cycle.

a. Requirements are defined and prioritized at the start (Requirements) of the Training Integration Plan. Individual training solutions to these requirements are then developed and programmed (Development + Programming) and captured in the ITEP before the final endorsement (Approval).



Figure 2-1 - Training Integration Plan

b. The Development and Programming part is referred to as ITEP Cycle.



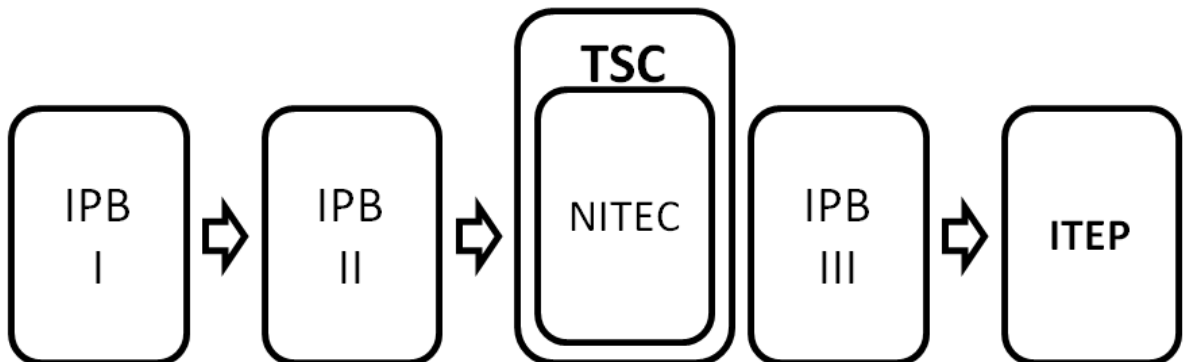


Figure 2-2 - ITEP Cycle

c. **Planning Boards.** The ITEP cycle consists of three Individual Planning Boards (IPB) and the **NATO Individual Training and Education Conference (NITEC)** as part of the Training Synchronization Conference (TSC). **There are separate Terms of Reference (TOR) for the IPB and NITEC.**

d. **Purpose of ITEP.**

1. The ITEP is a method designed to match NATO's and Partners' E&IT requirements with the available training opportunities in the NATO Individual Training and Education Conference (NITEC) and the NATO Training and Exercise Conference (NTEC). It will support the delivery of the right training to the right people at the right time in an effective, efficient and affordable manner.

2. Its purpose is:

- To match E&IT requirements to opportunities.
- To identify E&IT shortfalls and recommend solutions.
- To identify/eliminate redundancies to improve efficiency.
- To provide a transparent method of identifying NATO requirements to facilitate planning, budgeting and participation by all interested parties.
- To cover all CE/PE positions and Partner Training Requirements.

### 2.3 Programming Individual Training.

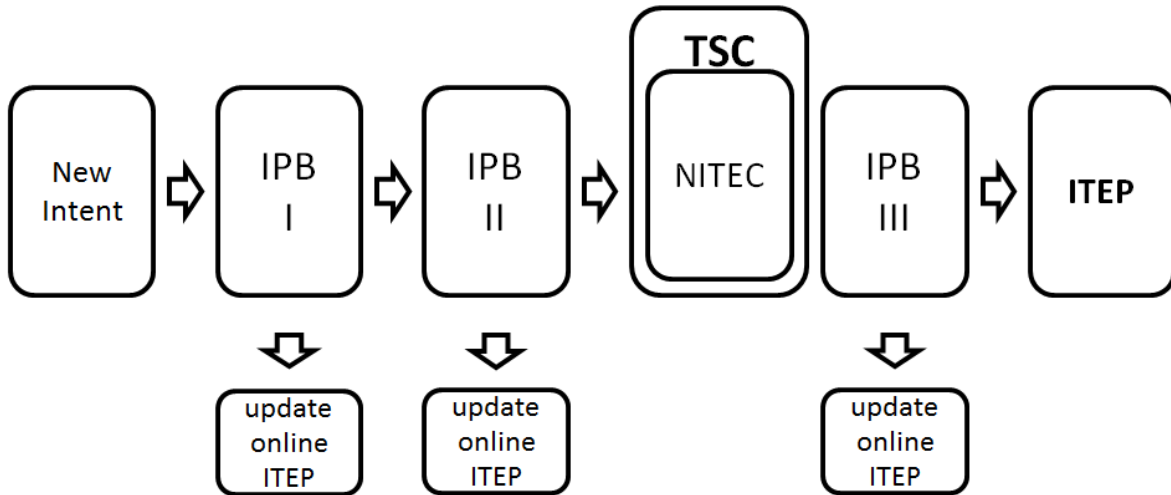


Figure 2-3 - Development of the *ITEP*

Figure 2-3 depicts the programming of the final ITEP based on the prioritized requirements captured in the SAGE through the three IPBs and the NITEC.

The IPB is headed by SACT ACOS JETE (JETE) and SHAPE ACOS J7 and chaired by HQ SACT JFT JETE Branch Head Education & Individual Training (E&IT) and co-chaired by SHAPE – J7 Branch Head Policy & Lessons Learned (PLL) and is conducted three times a year in parallel to the Military Training and Education Programming Board (MPB), which covers the development and programming of collective training and exercises.

The IPB process starts with the endorsement of the SAGE (new Intent) and aims at producing an Individual Training and Education Programme that is effective, efficient and affordable and delivers the right training to the right audience at the right time in response to the expressed and prioritized requirements. The process is designed to identify training gaps, manifested by either lack of or missing training opportunities. The Board will address those gaps and develop solutions. The IPB furthermore

- coordinates all E&IT efforts, including resource management for all ITEP activities
- ensures that NATO E&IT efforts support the broader spectrum of NATO E&T by keeping a close link to the MPB
- provides direction to all solution providers and prioritizes efforts in line with the SAGE when necessary
- coordinates tasks with Annual Discipline Conferences and establishes links and feedbacks through SACT ACOS JETE.

- supports and facilitates the synchronization and strategic integration of NATO E&IT within the NATO Command Structure Human Resources Data Services
  - a. Based on the **new Intent** captured in the SAGE, JETE is responsible to update the latest ITEP. This update collects all E&IT requirements and opportunities and is reviewed by the IPB Members as the basis for the preparation of the IPB I.
  - b. The **IPB I** will prepare the updated ITEP. It will review the ITEP processes, prioritize the E&IT requirements, identify mismatches and shortfalls in capacity analyzed and provide guidance to develop the ITEP.
  - c. The **IPB II** will prepare the updated ITEP. It will review the IPB I action items, make necessary updates and include the decisions taken during IPB I.
  - d. Within the **NITEC** as part of the TSC the final update of a 2-year coordinated ITEP will be proposed which is aligned with the coordinated MTEP.
  - e. The **IPB III** will review the IPB II action items, will update the Electronic Individual Education and Training Programme (e-ITEP) and finalize the ITEP to be approved. Additionally the Terms of Reference (TOR) for the IPB will be reviewed and adapted.

## 2.4 Tools

- a. **Electronic Individual Training and Education Programme (e-ITEP)**



The e-ITEP is a web based application hosted on the NATO Unclassified Public Area Network (NUPAN) facilitating the execution of the ITEP. The e-ITEP captures NATO education and training requirements from PE and CE posts, NFS and Partners and compares them to training opportunities as they are part of the Electronic Training Opportunity Catalogue (ETOC). This supports the management of training capacity and will, over time, provide a trend analysis to refine training management.

The e-ITEP produces individual training plans for each billet within the PE/CE and map out the education and individual training requirement as well as the when and where these trainings can be obtained. Additionally a direct registration within this Training Management System to necessary courses will be possible.

b. **Education and Training Opportunities Catalogue**



The NATO Education and Training Opportunity Catalogue (ETOC) as part of the e-ITEP is a web based application accessible through the NATO Unclassified Public Area Network (NUPAN). It replace the NATO Course Catalogue. Its aim is to provide all NATO and selected non-NATO (military and civilian) training providers with the opportunity to advertise their courses and to enable Nations, Partners, commanders, training managers, military operators as well as civilians to obtain an overview of the training available. The ETOC is managed by JETE, nevertheless the education and training institutions are the sole provider of the course information and their respective iterations. It is within their responsibility to insert the information and keep it updated. The user can, through the embedded search engine, access the data by subject area, course provider or geographic area as well as with a keyword search. Education and training institutions as well as registered users can use the functionalities of the ETOC to produce training calendars and print course catalogues. The ETOC provides the education and training institutions with the possibility to upload read-ahead material and other helpful documents for the student. In combination with e-ITEP, the system is able to inform students and training managers automatically when changes to course iterations occur.

c. **NATO Education and Training Portal**



In order to provide a single location for information on E&T, SACT DCOS Joint Force Trainer (JFT) has set up a NATO E&T portal.(the ETOC and e-ITEP are accessible through this portal). All stakeholders are encouraged to contribute to the development of this portal, which is located at: <http://www.e-NATO.net>.

### 3. FROM REQUIREMENTS TO INDIVIDUAL TRAINING OPPORTUNITIES

**3.1 Structure and Responsibilities.** While Bi-SC Directive 75-2 describes the global programming structure and responsibilities in general, this chapter concentrates on the special issues of the Individual Education and Training.

#### 3.2 Training Needs Analysis

a. **General.** The Training Needs Analysis (TNA) product is part of NATO's education and training Global Programming and encompasses the procedures from the Training Requirements Analysis (Operationalization) Final Report to the final E&IT product. The DH leads the process, supported by the Requirement Authority (RA) and JETE; the final product (TNA) is approved by the Department Head (DH) and acknowledged by SACT DCOS Joint Force Trainer (JFT).



**Figure 3-1 - Global Programming**

b. **Definition.** The Training Needs Analysis is a process used to systematically derive training opportunities from identified E&T gaps (TRA Final Report). This process is conducted using the Systems Approach to Training (SAT) Model as a tool (see Annex B). A TNA will be generated as an outcome of a TRA if a requirement is not met by an existing training opportunity. The TNA brings together Subject Matter Experts in a given area (academic, operational and or political expertise) for the analysis and for the design and development phase in case the analysis states the necessity for a new course or the revision of an existing course (see Figure 3-3 or, for the whole matrix Bi-SC Directive 75-2). Training opportunities are not limited to residential courses, they also encompass e-Learning and Blended Learning (see Annex J: E-LEARNING).

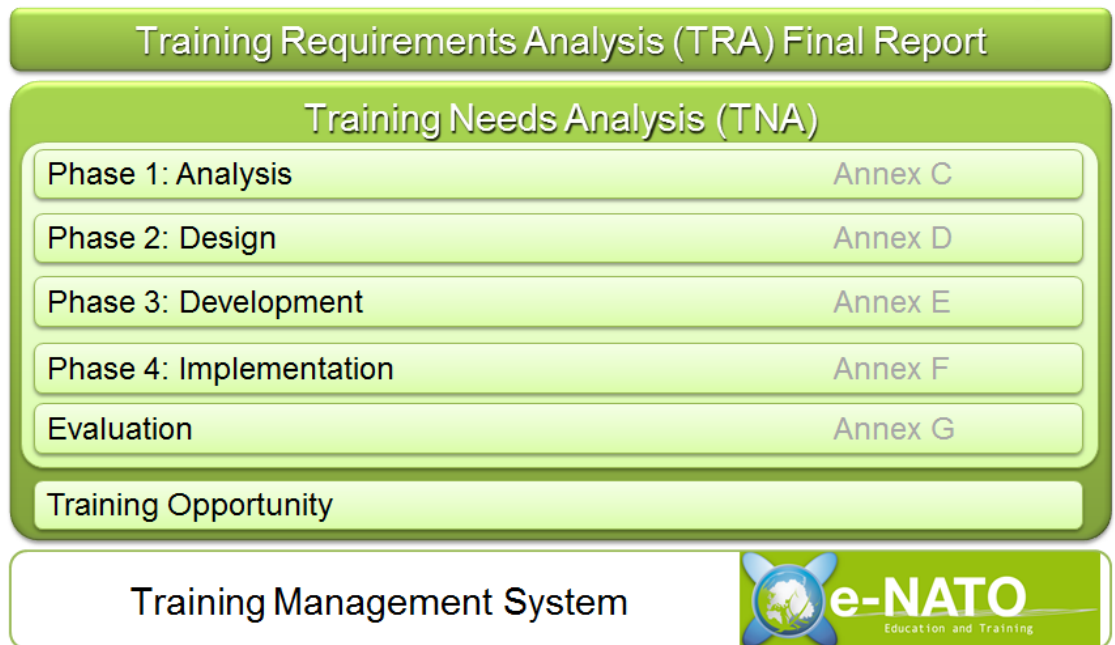


Figure 3-2 – TNA-Phases

- c. **Aim.** The aim of the TNA is to ensure that individuals in NATO Command Structure (NCS) and NATO Force Structure (NFS) receive the E&IT that is required to perform their tasks effectively.
- d. **Roles and Responsibilities.** The roles and responsibilities for the Requirements Authority (RA) and Department Head (DH) as well as for JETE and JFT in the TNA are defined in Bi-SC Directive 75-2, part 3 and are outlined below:

Element	RA	DH	JETE	JFT	MC/ NAC	Product
Training Needs Analysis	Support	Lead / Approve	Provide QA and E&IT Support	Acknowledge  (Approve in case of absence of DH)		Defines learning and enabling objectives required to eliminate performance gaps and systematically delivers a training opportunity

Figure 3-3 - Responsibilities Matrix

**3.3 Training Opportunities.** Education and Individual Training will be delivered through:

- e-Learning
- Residential Courses

**a. e-Learning**

1. e-Learning is a way of conducting education and training by electronic means, the content can be distributed in several electronic ways. e-Learning as one possibility to train and educate, takes an important and fast growing part in NATO's education and training spectrum since it offers a great variety of opportunities compared with residential – or classic classroom instruction – learning approaches. e-Learning can provide students with greater access to learning opportunities, enabling them to learn conveniently at their own place, independent of their location, whenever they choose.

2. By allowing downloadable or media-based materials or by live connection to a NATO network, including the Internet, e-Learning provides tools that enable synchronous or asynchronous distance learning. It can be utilised to provide a complete standalone course or be used as part of a blended learning programme that supports existing training courses by providing pre-learning teaching material or post-course references.

3. e-Learning is an important tool to provide education, training and performance support to NATO personnel and to personnel from partner nations in a very cost-efficient manner. It can significantly contribute to mission readiness by providing force effective, relevant, high quality and specific education and training.

4. e-Learning can be applied as the sole method of instruction when it can appropriately satisfy education and training requirements, when a large number of students distributed over geographic locations has similar training needs, to augment classroom instruction as an example of a blended learning approach or to provide refresher training that will help to maintain students' skills.

5. e-Learning technologies encompass Advanced Distributive Learning (ADL), Computer-Based Training (CBT), Immersive Learning, Mobile Learning (m-Learning) and Collaborative Learning. (see Figure 3-4). Further details can be found in Annex J.

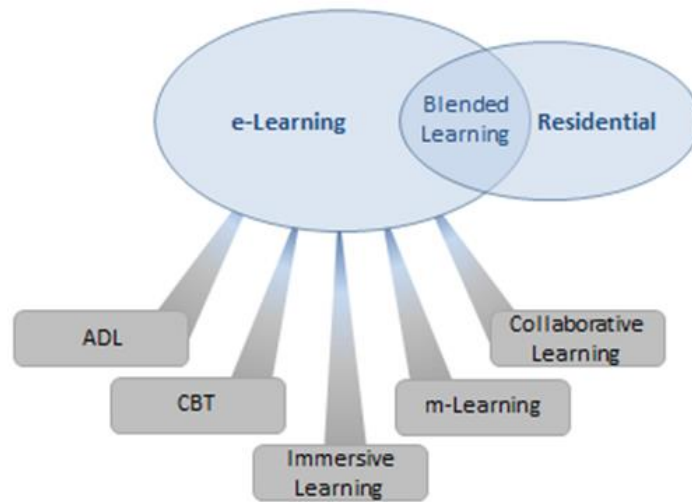


Figure 3-4 - e- Learning

- b. **Residential training or course.** Residential or traditional classroom instruction consists of lecture or discussion using a variety of instructional methods, both covering theory and practice. It is logically limited in space and time, and depends on both the availability of the learning audience and the learning infrastructure (including the instructors, logistic and administrative support).
- c. **Blended Learning.** NATO utilises all of these concepts and technologies to increase the readiness of their personnel, to keep personnel on a high educational level, to support staffs in exercises and operations to prepare them for upcoming tasks or to quickly respond to training needs. Blended learning integrates computer-mediated instruction with traditional classroom instruction in a planned, instructionally sound manner. It combines the best features of e-Learning (24/7 accessibility) with the best features of classroom instruction (live, face-to-face interaction).



**3.4 Phases and Steps.** The TNA consists of four phases (Analysis, Design, Development and Implementation) and the Evaluation as an overarching feedback cycle. Within each Phase several steps need to be conducted. These steps are numbered throughout all phases.

a. **Phase 1: Analysis.** The analysis is aimed at systematically analysing the outcome of the TRA and consists of the steps listed below (Details are described in ANNEX C: PHASE 1: ANALYSIS). The Analysis Phase concludes with the following recommendation:

- A new training opportunity will be designed and developed (TNA proceeds)
- An existing training opportunity will be revised (TNA proceeds)
- No training opportunity needs to be designed and developed (this concludes the TNA Process)

1. **Step 1 : Establish Analysis Working Group (WG).** The WG is established after approval of the TRA Final Report and conducts the analysis and crafts recommendations. Furthermore it comes to the “train/don’t train” decision.

2. **Step 2 : Task Analysis.** Examines the performance requirement in terms of behavioural tasks and subtasks, translates them into Performance Objectives (POs) and prioritizes them if they require instruction.

3. **Step 3 : Target Audience Analysis.** Determines categories of audience, location and size of population and required annual iterations.

4. **Step 4 : Performance Gap and Cause Analysis.** Identifies the difference between the current and the desired performance; the performance gap. The desired performance is captured in form of Performance Objectives (POs).

5. **Step 5 : Design and Develop Learning Objectives (LOs).** The POs are translated in LOs containing a performance statement with the conditions under which the tasks are to be performed and the standards which need to be met as well as a Knowledge/Skill/Competency Analysis.

6. **Step 6 : Training Options Analysis.** Determines and chooses the available option to obtain the required E&IT for the target audience (resident course, e-Learning, training on the job, METT).

b. **Phase 2: Design.** The design is the selection of instructional methods to ensure learners have acquired the identified competencies and consists of the following steps (Details are described in ANNEX D: Phase 2: DESIGN):

1. **Step 7 : Instructional Analysis.** Determines what to teach so that the learner will achieve the Los as specified in the Course Control Document II Part 1.

2. **Step 8 : Define Learner Characteristics.** Identifies those characteristics of the target population which impact the design of the instructional programme.

3. **Step 9 : Identify Performance Components.** Examines LOs and identify additional skills and knowledge essential to the task but not captured in LOs to determine what needs to be taught.

4. **Step 10: Apply Target Population Information.** Applies the characteristics of learner, once all LOs are identified.

5. **Step 11: Structure Course Content.** Groups and sequences various components identified through the conducted analysis.

- Determine Enabling Objectives (EO)
- Determine Teaching Points
- Sequence Instruction

6. **Step 12: Identify Instructional Strategies.** Identifies the combination of methods, media and environment used to deliver the instruction.

- Identify Instructional Methods
- Identify Media
- Select Learning Environment
- Combine Elements
- Define Instructor Ability

7. **Step 13: Estimate Costs of Instructional Strategies.** Conducts an efficiency analysis to ensure that the recommended Instructional Strategy is cost-efficient.

8. **Step 14: Select Instructional Strategy.** Chooses the Instructional Strategy which balances performance requirements and resource efficiency.

9. **Step 15: Specify Course Content and Lesson Guidance.** Compiles preceding steps of Design Phase and generates a coherent plan, specifying what must be learned and how learning will be assessed.

c. **Phase 3: Development.** The development is the creation of instructional guides for instructors and learners, instructional sequencing and all the necessary instructor and learner materials (Details are described in ANNEX E: PHASE 3: DEVELOPMENT).

1. **Step 16: Prepare Instructional Staff.** Enables the staff to deliver the developed course effectively.

2. **Step 17: Development of Course Material.** Generates course materials such as lesson plans, interactive courseware or training aids to support learning activities.

3. **Step 18: Control and Maintenance of Course Materials.** Creates mechanisms to control and maintain course materials to ensure that it reflects what needs to be taught, the material is standardized and updated and organize the amendment process.

4. **Step 19: Produce a Course Schedule or Time-Table.** Establishes schedules and plans to optimize good training practices.

5. **Step 20: Implementation of first Iteration.** Implements the first conduct of the course to assess the effectiveness of the developed course.

6. **Step 21: Course Registration.** Ensures an accurate and current Training Management System.

d. **Phase 4: Implementation.** The process of identification of appropriate iterations to support the opportunities required and the conduct of the instruction to the target audience through appropriate instructional methods (Details are described in ANNEX F: PHASE 4: IMPLEMENTATION).

e. **Evaluation.** A systematic process designed to collect data and assess alignment throughout the analysis, design, development and implementation phase in order to ensure instruction satisfies the intended instructional outcomes. The approach evaluation approach within each of the four phases differs. Within the Analysis Phase, the evaluation ensures that the problem was identified correctly and revisions are conducted throughout the further steps of the analysis. In the Design and the Development Phases evaluation focusses on to what extend objectives of the instruction are attained, whether the learner assessment is appropriate for the instructional method. These objectives are aligned with the

intended Depth of Knowledge (DoK). In the Implementation Phase the quality of the instruction is the focus of the evaluation. It is conducted to ensure instruction remains appropriate over time (Detail are described in ANNEX G: EVALUATION).

### 3.5 Training Management System



A course will be added to the Training Management System (TMS) and defined within the Electronic Training Opportunity Catalogue (ETOC) either as “NATO Approved”, or as “Listed” if accreditation is not requested or a course is not a NATO requirement.

## 4. INTERNATIONAL EDUCATIONAL STANDARDS

**4.1 General.** International Educational Standards articulate concrete binding requirements for teaching and learning. They thereby constitute a key mechanism in the effort to secure and enhance the quality of the work done in NATO's, partners' and National E&T Institutions. These standards specify the competencies that E&T Institutions must impart on their students. The students are expected to demonstrate these key competencies upon course completion. The key feature of the standards is operationally articulating the required competencies to allow an assessment of a student's performance. International Educational Standards constitute a three-staged process: Educational Goals lead to derived Educational Standards; the QA process ensures the alignment with these Goals and Standards.

### 4.2 Educational Goals

a. Educational Goals are both relatively broad general statements about knowledge, abilities and skills and also attitudes, values, interests and motivations, that E&T Institutions are expected to impart. These statements are influenced by social and educational objective decisions, research, psychological and didactic statements of capacity building, and concepts and/or methods of assessment development.

b. Educational Goals are usually also associated with a particular view of the significance of a subject area for personal development and of its function in a wider context (familiarity with problem solving methods vs. the ability to "model" the problem to be solved); the main purpose should be to qualify students for an on-going lifelong learning process. Educational Goals reflect only very general expectations, however. In order to put these into practice, traditionally the Curriculum has been used, which is now to be supplemented by competencies.

### 4.3 Educational Standards

a. Educational Standards are based on Educational Goals, which are intended to drive E&T Institutions-based learning; they translate these goals into specific requirements. They are binding requirements for teaching and learning. Educational Standards express the essential goals of pedagogical work in precise, comprehensible and focused terms as desired learning outcomes for students. They thus translate into concrete terms the educational mission to be fulfilled.

b. Educational Standards draw on general Educational Goals. They specify the competencies that Education and Training Institutions must impart on their students in order to achieve certain key competencies that students are expected to have acquired at a particular stage. These competencies are then described in

such specific terms, that they can be translated into particular tasks and can be assessed. This description of competencies that are acquired within a certain subject (e.g. Comprehensive Operational Planning, CIMIC, Gender) and their various dimensions and levels are decisive.

For more information see chapter 4 within Bi-SC Directive 75-2.

#### **4.4 Quality Assurance**

##### **a. Aim**

1. The purpose of Quality Assurance (QA) is to establish processes and procedures ensuring the highest possible degree of quality for NATO's E&T while at the same time providing autonomy and flexibility to the institutions involved, to the programmes and modules/courses. It furthermore provides the basis for the coordination between E&T stakeholders and for continuous improvement of transparent E&T quality.

2. The objective of QA is to implement quality improvements of the E&T content in order to satisfy the needs of the Operational Commanders or other customers, to bolster partners and to support nations in their national approach to lifelong learning. To achieve this, certain principles must be established regarding the different education and training stakeholders and events:

- Relevant to the needs of NATO and meeting NATO E&T requirements.
- Transparent in the learning/training processes and procedures.
- Accountable towards stakeholders and learners/participants.
- Responsible for implementing best practices.

##### **b. Responsibilities in QA**

1. A Systematic Top-down-approach in NATO E&T. The requirement for formal systems and procedures has arisen from the appreciation that effective QA within large complex organisational structures like NATO is beyond the capacity of individuals using informal methods. A systematic approach is vital to effective planning and problem-solving and must be based on the requirements of the organization as a whole rather than on local subsystem needs.

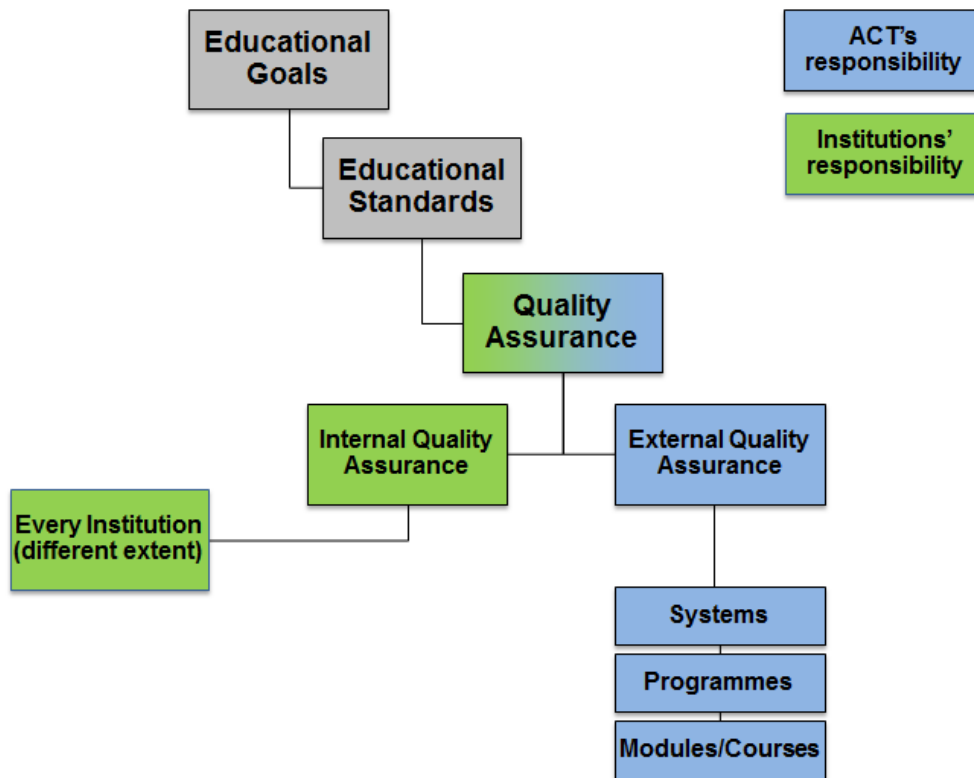


Figure 4-1: Responsibilities in QA

2. Four areas of quality within E&T have been identified:

- (a) **Structure.** QA must cover all its activities, not only the specifically academic functions (administrative and supporting functions are involved).
- (b) **Objectives.** To align elements of QA with standards, institutions are responsible to develop a QA policy to ensure directions and guidance for the other three quality areas.
- (c) **Quality Systems.** This aspect relates to the design and development of formalized and documented systems for QA, which will allow the institutions to achieve their quality mission.
- (d) **Review and Improvement Process.** Verifying QA systems are effective and aligned with established QA policy and objectives is an on-going process. Initially, measures of effectiveness must be established for product outcomes to specify if outcomes meet minimum acceptability.

3. The QA process ensures that NATO's standards are in line with international Educational Standards, which are expressed in Educational Goals and derived Educational Standards are met. This systematic approach along with the principles provides the main framework of QA within NATO E&T.

c. **Internal QA and External QA**

1. **Internal QA** procedures are implemented by each institution providing E&T. The procedures implemented ensure the quality of teaching within the institutions and facilitate necessary feedback loops in order to further improve E&T. For Internal QA for E&T Institutions, the following criteria will be used:

(a) **Policy and Procedures.** There is an internal policy and procedure for Quality Assurance including responsibility and authority. The internal QA system guarantees interior and exterior transparency;

(b) **Approval, Monitoring and Periodic Review of Programmes and Awards.** Established and measurable Educational Standards and categories that will support NATO E&T requirements (adequate and reliable needs assessment and instructional system design including a thorough and open process of evaluation and validation) developed through an academic unit quality system;

(c) **Assessment of Students.** A defined way to identify competencies and objectives through a programme of study administration and control;

(d) **Quality Assurance of Faculty and Staff.** A recruitment, review and development of staff in order to have competent, knowledgeable and professional team of instructors;

(e) **Learning Resources and Student Support.** Learning environment that is conducive to the training audience and encourages student participation and creative thinking supported by an adequate learner registration and selection process;

(f) **Information Systems.** Integrated visibility, innovation and research processes for continuous improvement, best practices, Lessons Learned and professional development supported by a documentation;



(g) **Public Information.** An integrated approach for successful communication with international learners and intercultural learning.

2. **The External QA Process**, supervised and partially conducted by JFT is threefold: For systems, for programmes and for modules/courses. The requirements for accreditation are different for each of those accreditation types. External QA in general focusses on three general aspects:

(a) It ensures that an appropriate level of internal QA is implemented. This level differs according to the accreditation type which should be achieved, (e.g., system, programme or module/course).

(b) It ensures the quality of the content of programmes and modules/courses.

(c) It focusses on:

- **Aims.** Does the system, programme or module/course have clearly defined, reasonable aims/objectives?
- **Concept.** How are the aims/objective implemented in the concept of the system, programme or module/course? How do individual elements contribute to the achievement of the whole institution, programme or module/course?
- **Implementation.** Are the resources and the organisational requirements adequate to implement the concept in consistent and target-orientated way?
- **Quality Assurance and Development.** How is the quality of the system, programme or module/course assured? Which measures aim at the further development of objectives, the concept and the implementation?

#### 4.5 Accreditation

a. JFT will direct an external QA evaluation to accredit an E&T institution, termed System Accreditation, programmes, modules and courses. The goal of the accreditation is to review structures and processes as well as to evaluate and assess admissibility of programmes, modules/courses to see whether qualification objectives are met and to ensure a high quality in line with international educational / NATO standards. Dependent on the type of accreditation, (e.g., system, programme or module/course) deviations can occur.

b. **System Accreditation.** System Accreditation is the highest achievable level of accreditation and covers the whole E&T Institution. It requires very distinguished internal QA mechanisms and, once achieved, includes the accreditation of all programmes and modules/courses run in this E&T Institution without having to complete the full accreditation process for content separately. It provides an institution with a great flexibility but requires it to establish very high standards. The System Accreditation will therefore have to be carefully considered (see Annex I). E&T institutions will request System Accreditation. This will be conducted by a Team of Experts and contains the following steps:

1. Application.
2. Preliminary Assessment based on questionnaire.
3. On-site visits
  - In depth analysis of the internal QA and the structure of the institution
  - Spot Checks of the courses focused on concept, aims and implementation
4. Preliminary Report on internal QA.
5. Comment from the E&T Institution.
6. Final Report based on the results from the on-site visit and the comments provided by the E&T Institution.
7. Comment from the E&T Institution.
8. Accreditation Decision by JFT.

c. **Programme Accreditation.** E&T institutions will request a Programme Accreditation. This will be conducted by a Team of Experts and contains the following steps: (see Annex I, Appendix 6)

1. Application.
2. Preliminary Assessment based on questionnaire.
3. On-site visit
  - Spot Checks of the courses focused on concept, aims and implementation
4. Preliminary Report on internal QA.
5. Comment from the E&T Institution.
6. Final Report based on the results from the on-site visit and the comments provided by the E&T Institution.
7. Comment from the E&T Institution.
8. Accreditation Decision by JFT.

d. **Module/Course Accreditation.** The E&T Institutions will request a Module/Course Accreditation. This will be conducted by a Team of Experts and contains the following steps: (see Annex I, Appendix 7)

1. Application.
2. Assessment based on
3. NATO requirement.
4. RA support.
5. DH recommendation / coordination.
6. NATO standards as laid down in Bi-SC Directive 75-2 and Instructional System Design Process model.
7. Assessment Criteria for Modules/Courses.
8. On-site visit

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- if the module/course is conducted at an institution where an accreditation process [for programmes, modules/course] has not been already successfully completed
- 9. Report (results of the on-site visit and the self-evaluation documents).
- 10. Comment from the E&T Institution.
- 11. Accreditation Decision. Module/courses will be entered into the NATO Training Management System as either
- 12. "NATO Approved" or
- 13. "Listed", if not requested or not a NATO requirement

e. **Team of Experts.** The Team of Experts assesses the quality of the institution (System), programme or module/course using the general accreditation procedure found in Annex I. In the preparation phase of the accreditation procedure the Team of Experts reviews the self-evaluation documents for consistency, plausibility and conformance with international educational standards. This is followed by on-site visit. After on-site visit is completed, the Team of Experts compiles a report based on the alignment with the Quality Assurance Minimum Criteria and International Educational Standards. The outcome of the report is an accreditation recommendation as the basis for JFT's accreditation decision. In general, the Team of Experts consists of the following personnel:

- 2 SMEs from outside the institution with the ability to comment on the contents of the programme or module/course and the structures/processes of the institution
- 1 expert from the professional practice; a representative of JFT, who supervises the accreditation procedure and has the necessary experience
- 1 representative student, who should have attended a course of the subject, and has some procedural experience
- 1 representative of the International Workforce, preferably working close to the subject

**4.6 Accreditation Results.** The following decisions are possible (for details see Annex I):

- a. Unconditional Accreditation
- b. Conditional Accreditation

- Recorded Discrepancies can be corrected within 9 months.
- c. Suspension of the accreditation procedure
- One time only.
- In principle 12 months, not longer than 24 months for System Accreditation and not longer than 18 months for the accreditation of programmes.
- d. Rejection

**4.7 ACT/JFT Responsibilities.** ACT/JFT holds responsibility for the execution / management of high quality E&T. To support this, the following criteria will be implemented:

- a. **Status.** JFT is responsible for QA within NATO E&T.
- b. **Use of QA Processes.** JFT will utilize the accreditation procedures based on the principles and standards defined in this document and in the Bi-SC Directive 75-2.
- c. **Activities.** JFT is conducting similar activities on regular basis, based on invitational grounds.
- d. **Resources.** JFT will create room for adequate resources, both human and financial, to organize and run the QA processes.
- e. **QA Criteria and Processes.** They are publicly available and defined within this document, as well as in Bi-SC Directive 75-2.
- f. **Accountability Procedures.** Accountability procedures are in place.
- g. **Monitoring.** JFT monitors each accredited system, programme or module/course throughout the period of accreditation to verify that it continues to meet the standards.
- h. **Re-accreditation.** JFT periodically re-accredits each system, programme or module/course to ascertain whether the continuation of its accredited or reaccredited status is warranted.