

# THE JOINT WARFARE CENTRE TRAINING EVENT DEVELOPMENT ANALYSIS TRAINING OBJECTIVES REVISITED

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IN THE JULY 2016 edition of the Joint Warfare Centre's (JWC) *The Three Swords* magazine, my colleague and I published an article entitled "JWC Training Analysts and the Training Objectives". While the information provided in that article is mostly still extant (I encourage all to read it by scanning the QR code given below), the intent of this article is to provide an update and to discuss some previously unaddressed issues and frequently asked questions about the training objectives.

The current version of the Bi-Strategic Command (Bi-SC) 075-003 Collective Training and Exercise Directive (which is a working draft, dated January 28, 2020) provides the direction for the NATO military collective training and exercise process, as well as processes

for developing exercise objectives and training objectives for major joint exercises. The directive also includes sample exercise objectives based on main capability areas that can be modified for each specific exercise, depending on factors such as mission and scenario.

In effect, each exercise begins before the exercise process starts, as each training audience should develop a set of roadmaps to plot their training requirements over a series of exercises in a multi-year period. The development of exercise objectives, therefore, starts with Stage 1 (concept and specification development) before the exercise process, with an exercise objectives workshop conducted as the draft exercise specification document is being produced. The generic exercise objectives from Bi-SC 75-003 are then modified to produce exercise objectives tailored to each phase or sub-phase of Stage 3 (operational conduct) of the exercise process, such as crisis response planning (Phase IIB) and execution (Phase IIIB).

Development of training objectives is a time-consuming process, especially in exercises involving multiple training audiences. It often

also depends on how the training objective manager representing the training headquarters decides to structure the training objective development timeline. For example, the training objectives workshop could be at (or near) the start of the exercise process, or it could be later in the process (more collation/confirmation), or it could be split into two at different stages of the process. Bi-SC 75-003 suggests allotting at least six weeks to develop the training objectives, but from my experience, the process can take considerably longer.

Think of a complex exercise such as STEADFAST JUPITER 2021. It was approximately seven to eight months from the training objectives workshop to final training objectives approval. Certainly, time to develop training objectives for a less complex, single-training audience exercise could be limited to six weeks or less, but multiple levels and large numbers of participating headquarters will add time and complexity. I believe that this is one area where there is room for improvement by developing training objectives for more complex exercises.



FURTHER READING

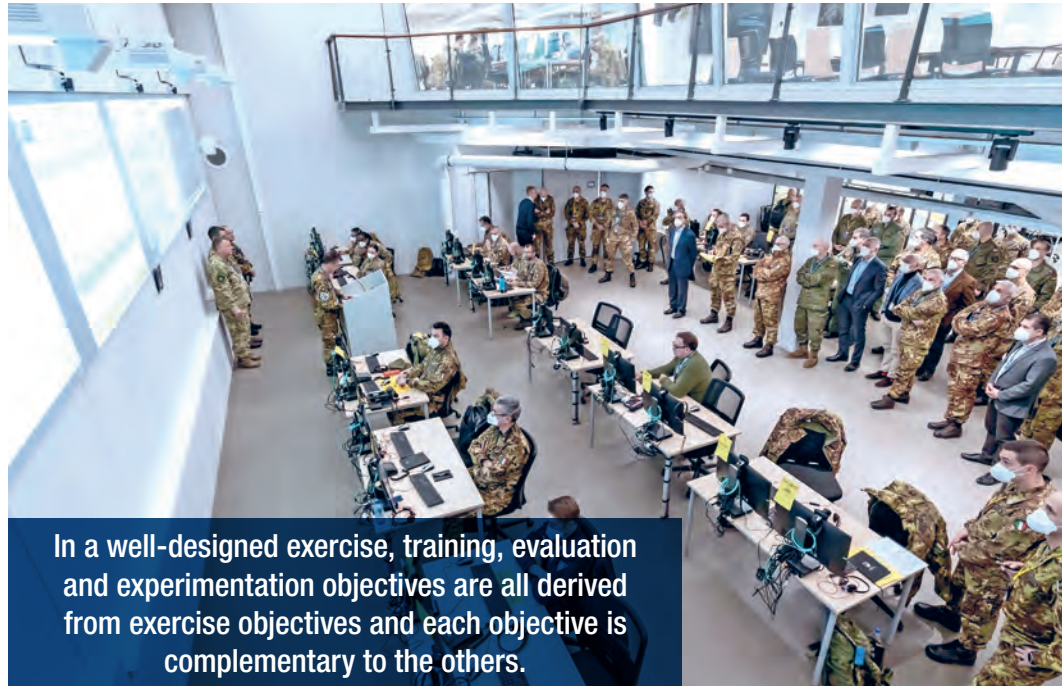
**JWC Training Analysts and  
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## What is New: Standing Training Objectives

Although training objectives are complex in themselves, a recent initiative, led by Supreme Headquarters Allied Powers Europe (SHAPE), has begun to simplify their development process for NATO's major joint exercises. Standing training objectives (note that I did not write *standardized* training objectives!) provide a starting point for specific levels of headquarters. Indeed, they provide an approximately 70-percent solution that can be modified to suit specific exercises (for example Article 5 vs. non-Article 5), exercise objectives, and other unique requirements. The standing training objectives are still owned by the commanders of the training headquarters, but they no longer have to be developed from scratch for each exercise. They also benefit from both lessons identified and learned in previous exercises, as each standing training objective can be considered part of a living document that can and should be updated based on experience and evolving doctrine.

As an example, the strategic- and operational-level standing training objectives were developed six months before the execution of the JWC-directed Exercise STEADFAST JUPITER 2022 (STJU22), tailored for Article 5 operations. Development of tactical-level standing training objectives began right after, with component training objectives from STJU22 as possible baselines.



In a well-designed exercise, training, evaluation and experimentation objectives are all derived from exercise objectives and each objective is complementary to the others.

ABOVE: The In-Rock Facility Combined Joint Operations Centre during NATO Exercise STEADFAST JACKAL 2022 Distinguished Visitors' Day. Photo by NRDC-ITA PAO

The JACKAL series of exercises also employs a set of standing training objectives tailored for non-Article 5 operations for the joint task force (JTF), joint logistics support group (JLSG), and NATO Response Force (NRF) joint force air component (JFAC) headquarters. To ensure the training objectives of each training audience were complementary, the JTF headquarters' training objectives were modified from the standing training objectives first, with the other headquarters following them. Use of standing training objectives has shortened the process of developing finalized training objectives, increased consistency across exercises, and removed some of the complexity from developing exercises.

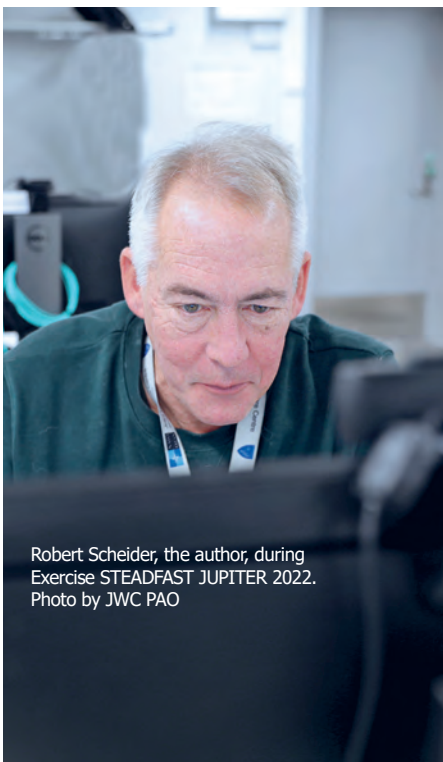
### Some Tips

Bi-SC 75-003 contains detailed information about the components of training objectives (such as task statement, supporting tasks, conditions, and standards); however, it does not focus on the development phase of training objectives (or the modification of existing ones). If a training headquarters begins the development of their training objectives by requesting that each branch and section propose their own training objectives, the headquarters then may attempt

to select the most relevant of these. From my experience there is a better way. I believe that starting training objectives development from the bottom tends to lead to branch-specific, stovepiped tasks and supporting tasks. The 2016 article I mentioned in the beginning describes a process based on establishing a cross-functional team (such as a joint operational planning group or operational planning team) to ensure training objectives reflect functions from the whole headquarters; that process is still valid. I highly encourage all training audiences to adopt that approach and avoid the development of bottom-up, stovepiped training objectives.

Another important consideration is to facilitate the command group's involvement at all stages to ensure that projects (in this case, training objective development) meet the commander's intent or requirements. As such, it is essential to have a strong training objective manager to lead the scripters through the process. This individual should have ready access to the command group and should update them regularly on progress.

The training objective manager must enforce timelines and standards and should be entitled to make or request editing to ensure consistency among training objectives, as well as to prevent redundancy.



Robert Scheider, the author, during Exercise STEADFAST JUPITER 2022. Photo by JWC PAO







ABOVE: The JWC's Lessons Learned Branch. Photo by JWC PAO

A typical example of redundancy is the overlap between training objectives (for example when two or more training objectives are used to describe the same key process) or when supporting tasks are the same in multiple training objectives. Keep in mind that each training objective should focus on a key process (such as "conduct operational planning") and the supporting tasks should all be observable, within a specific exercise phase (for example "conduct mission analysis and deliver mission analysis briefing" during Phase IIB, crisis response planning). Training audiences commonly put a great deal of effort into developing task statements and supporting tasks (and they should certainly continue to do so!), but it is recommended that they also put sufficient time into crafting the final two elements of a training objective: conditions and standards.

Conditions are often very specific to a given headquarters or exercise and will require some tailoring, even if using standing training objectives. They represent what must be in place to ensure the training audience can accomplish its training objectives. Think of them as a wish list. If there is an officer directing the exercise (ODE) appointed, such as the Joint Warfare Centre, they can assist training audiences in defining conditions and can provide feedback on

whether they can deliver on what the training audience requests. Each condition is important and can help participating headquarters and the ODE in preparing for the exercise. Conditions can only be useful, however, if they are defined early in the process.

For example, the conditions relating to response cells and augmentation will require the training headquarters to request personnel with specific skills and expertise from appropriate sources (such as the commands that will provide response cells or centres of excellence for specific augmentation requirements). When developing conditions, the training headquarters must refer to the list of supporting tasks to be sure it will have the right people in the response cells to develop main events list/main incident list (MEL/MIL) injects and inject them, as well as the proper augmentees to accomplish the supporting tasks.

If, for example, a training audience wants to exercise space domain functions, there must be a response cell to develop and deliver space products and there must be some space expertise within the headquarters to interpret and apply them. The space subject matter experts (SMEs) would need to be actively involved in MEL/MIL development and be available for all phases of the exercise.

Each training objective should have defined standards. However, experience has shown that there is a need to invest more effort into developing this element. Standards consist of reference documents and criteria of performance. The reference documents, including doctrine and headquarters-specific standing operating procedures and standing operating instructions, should explain the processes related to the training objectives and supporting tasks. Headquarters' permanent staff (especially newcomers), external augmentees, and advisory team members will be able to refer to these documents to learn the specifics of each process as performed in a given headquarters.

In the past, we have sometimes observed training audiences leaving criteria of performance blank or simply listing another reference document. This is not adequate. Criteria of performance should be statements of "what right looks like". Those are relatively easy to define for certain types of training, such as passing scores on rifle ranges or tank gunnery tables. For command post exercises, they normally require qualitative statements based on expected products produced or processes employed by the training audience, such as "operational concept of operations (CONOPS) delivered and approved by SHAPE".





## Setting the Conditions for Training Objectives' Achievement Through Exercise Content

The conditions that must be in place to enable training audiences to achieve their training objectives are well-defined in Bi-SC 75-003. However, training audiences must also familiarize themselves with suitable MEL/MIL conditions. Because training objectives are composed of many supporting tasks, it is difficult to determine if the MEL/MIL will enable achievement at the supporting task level.

The Joint Exercise Management Module (JEMM), the primary tool used to develop, manage, and deliver content during Phase IIIB, only allows users to track incidents against training objectives; there is no fidelity at the supporting task level. At the JWC, training objectives and specific supporting tasks are assigned to each incident/storyline during the incident development workshop and are applied at the scripting workshop. Training analysts (supported by the Centre's Advisory Team) develop spreadsheets and code each supporting task according to whether it would need triggers from MEL/MIL injects or opposing forces (OPFOR) actions or is likely to be triggered based upon procedures and battle rhythm events.

In a typical command post exercise, only about 25 to 30 percent of supporting tasks require triggers from MEL/MIL. The training analysts look for any potential gaps, i.e. supporting tasks that are missing expected MEL/

“Each training objective should focus on a **key process** and the supporting tasks should all be **observable**.”



**ABOVE:** The JWC's Advisory Teams during Exercise STEADFAST JACKAL 2022 (top) and STEADFAST JUPITER 2022. Photos by JWC PAO

MIL triggers. When all supporting tasks have some type of potential trigger, then the MEL/MIL is adequate to enable achievement of the training objectives.

### Assessment Is Not Evaluation

One thing is crucial to get straight from the start: Assessment of the training objectives is not the same as evaluation. The JWC has advisory teams that contribute to training objectives' assessment, while evaluators are provided by other headquarters (such as SHAPE for most joint evaluation, Allied Maritime Command for maritime evaluation, etc.). So what is the difference?

There are two primary reasons why the JWC conducts training objectives assessment: 1) Bi-SC 75-003 requires that we report on exercise objectives and training objectives' achievement in our first impression reports (FIRs), and even more importantly, 2) the ODE needs to determine if training audiences are achieving their training objectives in order to steer the exercise. As training audiences achieve some training objectives, we can focus efforts on those that are yet to be achieved.

If there is a risk that a training objective will not be achieved, the ODE will determine

if there is a possible mitigation measure. For example, if a training objective related to joint targeting is "at risk", there could be opportunities to provide focused on-the-spot training or advice, additional MEL/MIL play related to certain aspects of targeting, or a combination. During Phase IIIB, the chief analyst updates the exercise director on training objectives' achievement daily, with an emphasis on training objectives that may not be on track to be achieved and recommended mitigation measures.

There are three main requirements that must be in place prior to start of exercise (STARTEX) to ensure we can assess training objectives' achievement: 1) a team of trained observers, 2) a plan to conduct observations and reporting, and 3) assignments of observers to specific training objectives and supporting tasks. While Bi-SC 75-003 refers to "training teams", the JWC employs advisory teams. These consist of subject matter experts representing each of the joint functions, as well as specialized functions such as operations assessment and cyber defence.

When training objectives or supporting tasks are related to functions not found within the JWC's organic Advisory Team, the Centre may request subject matter experts from other sources, such as NATO centres of excellence



or other organizations. For example, the JWC routinely requests support from the NATO Command and Control Centre of Excellence, NATO Stability Policing Centre of Excellence, and NATO Security Force Assistance Centre of Excellence for the STEADFAST JACKAL series of exercises. The chief analyst develops a plan for how to observe and report on training objectives achievement and training audience performance. At the JWC, we call this the director's observation guidance (since it is signed and issued by the exercise director).

Simply put, this guidance includes the criteria for assessing achievement for supporting tasks and training objectives, how and when to report, and other guidance. This is reinforced in training conducted before deploying to exercise locations for Phases II and III. The chief analyst and the advisory team lead develop a plan to assign supporting tasks and training objectives to advisory team members, who are responsible for providing written observations related to their supporting tasks and training objectives, as well as providing achievement assessments based on the criteria in the director's observation guidance.

Supporting task assessment is based on a colour system. At the JWC, we use white to indicate that a supporting task has not yet been observed (and most supporting tasks on Day 1 of a command post exercise will naturally be white). Yellow means that a supporting task has been partially achieved or the training audience has been partially effective. Green is for supporting tasks that have been fully achieved and dark green is used when training audiences have surpassed expectations or demonstrated a potential best practice. Red is used to indicate a risk. Overall, training objective assessment uses a similar colour-based approach and employs an aggregation of each supporting task status. For example, if a training objective has 10 supporting tasks and three are white, five are yellow, and two are green, the training objective will likely be considered yellow.

However, not all supporting tasks are necessarily of equal importance in achieving the overall training objective. A good example is a training objective for operations assessment: Most of the supporting tasks could be green, but if the most significant supporting task (related to conducting an assessment board) is white and has not yet been accomplished due to the placement of the activity

in the battle rhythm, it will still probably be considered yellow overall until the assessment board is complete.

Training objective assessment is still a subjective/qualitative process based on the combination of observations and best professional judgement of the advisory team and analysts. The colour rubric and definitions are the tool to bound this subjectivity for common understanding and representation purposes. For example, it allows for quick visualization tools for the ODE and chief exercise control (EXCON) to understand the trends of training objectives achievement and concern areas that *may* require EXCON actions. It does not result in a "score" or "report card" as such. The JWC's SOI 800-11 (available within NATO upon request from the author) provides more information and includes criteria for supporting tasks and training objectives assessment.

Ultimately, it is the training audience, under the officer coordinating the exercise (OCE) overall, that is responsible for assessing its own training objectives achievement, and the ODE representatives assist by providing their own observations and recommendations in this regard through first impression reports. Since the JWC provides ODE support to the STEADFAST series of exercises conducted within NATO each year, every headquarters should have the ability to conduct its own self-assessment of training objective achievement. The JWC's Advisory Team and analysts provide full support across all functions to the joint task force headquarters, including a full training objectives assessment.



The JWC's Head of the Lessons Learned Branch, Lieutenant Colonel Satir, during STEADFAST JACKAL 2022. Photo by NRDC-ITA

In addition, the JWC can to some extent support the component commands. Bi-SC 75-003 requires every exercise participant to report their views on exercise objectives and training objectives achievement in their first impression reports. From our experience, some headquarters and commands have developed this capability exceptionally well, while some others conduct their own assessment in an ad hoc fashion.

Headquarters without external ODE support, therefore, should begin organizing their own teams early in the exercise process. This includes appointing team chiefs or leads for observer and analyst roles. Whether the headquarters refers to this team as a training, advisory, or observer team, it must be able to observe and report on supporting tasks and training objectives achievement. One approach is to request subject matter experts from each branch that are dedicated to this team and are not part of the training audience. They can observe the processes and provide training or assistance, if necessary. Appropriate expertise and experience is a prerequisite and it may be necessary to request subject matter experts from other headquarters for certain specialized functions, such as cyber defence. Referring to the JWC SOIs will provide useful information on roles and responsibilities of advisory team chiefs, subject matter experts and analysts.

While end of exercise (ENDEX) and the after-action review mark the end of the most visible phase of an exercise, Phase IIIB, the exercise process is not truly complete until the completion of Stage 4. Besides reporting on key observations and providing assessments of exercise objectives and training objectives achievement in first impression reports, headquarters' staffs should review their performance to update their procedural training roadmaps and incorporate key lessons into their training programmes in advance of their next exercises, including an update to training objectives, if necessary.

Finally, to paraphrase former German national football trainer Sepp Herberger: "After the exercise is before the exercise!" Most likely the exercise process for the next exercise will be well underway already. Fortunately, since each headquarters is required to develop a total of three first impression reports after specified stages and phases, there is a chance for early adjustment from one exercise to the next. ✦