DEPARTMENT OF DEFENSE

STRATEGIC PLAN

FOR

JOINT OFFICER MANAGEMENT

AND JOINT PROFESSIONAL MILITARY EDUCATION

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TABLE OF CONTENTS

Executive Summary……... 1

Introduction…… 3

Background……. 5

Department of Defense Missions & Goals – The Strategic Link…… 6

Strategic Objectives for the Management and Development of Joint Officers……. 7

Expanding the Human Resource (HR) Definition of "Joint" and Identifying Joint Requirements…….. 8

Joint Officer Development – The Foundation……. 10

Reserve Component Joint Officer Development……. 13

Joint Officer Management for the 21st Century…….. 15

Conclusion and Next Steps…… 18

APPENDICES

APPENDIX A – Issues NDAA 2005, Section 531Requirements…… 20

APPENDIX B – CJCS Vision for Joint Officer Development……... 49

APPENDIX C – Definitions……..... 51

DEPARTMENT OF DEFENSE
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Executive Summary

The Department's plan for Joint Officer Management (JOM) creates a system focused on the full gamut of the personnel life cycle, with particular emphasis on the development of joint qualified officers. This plan proposes a new capability-based qualification system that will transform JOM from its current static format to a more dynamic, flexible process capable of recognizing and tracking joint experiences and competencies. The Chairman of the Joint Chiefs of Staff Vision for Joint Officer Development (JOD)[1] is seminal to this effort. This vision provides an important link to the goals of the Department with respect to how future leaders will be developed.

JOM and JOD are inextricably connected as systems/processes that create a fully joint qualified officer (JQO). It is therefore essential to understand how these terms are used in this plan. JOM is a cradle-to-grave method of managing officers through the continuum of joint experiences, including developmental and joint duty assignments. Additionally, JOM provides the mechanism for tracking joint experiences and qualifications. JOD is a process to produce the largest possible body of fully qualified and inherently joint officers for command and staff responsibilities by cultivating an officer's service competencies and transforming them into joint capabilities through Joint Professional Military Education, training, experiences and self-development. The Capstone Concept of Joint Operations (CCJO) vision of the future joint force provides the impetus for JOD to prepare officers to operate effectively in their roles as leaders of the envisioned force.

The joint force management infrastructure must be as dynamic as the environment in which the joint forces operate to ensure organizations have the right mix of appropriately joint educated, trained, and experienced officers to meet mission requirements. To this end, the strategic plan describes a vision for developing personnel who are capable of accomplishing the full spectrum of joint missions and goals set forth

[1] CJCS Vision for Joint Officer Development, November 2005, attached as Appendix B.

by the Commander-In-Chief. This plan establishes the way ahead for using this vital resource in consonance with the tenets of the 1986 Goldwater-Nichols Act (GNA)[2], by applying enhanced definitions of "joint matters" and "joint qualifications," which are reflective of today's integrated force environment.

The Department has undertaken several strategic-level initiatives over the past few years to provide a framework for identifying the new unified, integrated joint environment. Ongoing studies and analyses, conducted by external research partners, will provide the empirical data to establish the direction necessary to implement this vision in the next few months.

These studies seek to define the capabilities, characteristics, and competencies of jointness as they relate to the Department's current and future roles and missions. In addition, they will quantify the various requirements associated with joint duty and postulate the relative impacts of management decisions on the joint personnel development system. As these ongoing efforts culminate, they will form the basis for the Department's legislative agenda and act as a change agent for the integration of joint experiences in Service cultures.

[2] Enhance joint warfighting capabilities; increase the quality of officers in joint assignments; ensure that officers are not disadvantaged by joint service; ensure that general and flag officers are well-rounded in joint matters; enhance the stability and increase the joint experience of officers in joint matters and strengthen the focus of professional military education in preparing officers for joint duty assignments.

INTRODUCTION

The mission of the Department of Defense (DoD) is to provide the military forces needed to deter war and protect the security of the United States.[3] This mission is executed by maintaining an unmatched high quality military force, deterring war in the most dynamic environments known, and protecting the interests of the United States in domains previously unimagined. This plan articulates that the military needed to meet our national and military goals must be comprised of personnel who are trained, educated, experienced and acculturated in jointness. Within that joint construct, our military must evolve into a force that thinks more critically, is more strategically minded and is the most skilled joint warfighting force. This 21st century military will work as a joint and combined team to rapidly plan and adapt to fluid situations with greater effect.

The DoD management processes for joint duty assignments, education and training were built around the solid foundation provided by the GNA. While this infrastructure provided unparalleled success in joint operations from Desert Storm to the present, today's environment, dependent upon integrated operations and near-instantaneous situational awareness, demands a greater need for "jointness." Factors which contributed to this environmental shift include: 1) a one-third reduction of forces from 1986 levels which necessitated smaller, more rapidly deployable joint forces for specific missions, 2) geo-political realities of the Post Cold-War era creating global communities of nations, and 3) technological advances enabling the seamless integration of forces.

Joint Task Forces (JTFs) now define the way we array our armed forces for both war and operations other than war. The effectiveness of joint operations is no longer simply the integration and/or interoperability of two or more military services; it requires the synergistic employment of forces from multiple services, agencies, and nations. Non-governmental agencies and commercial enterprises must now be routinely combined with these traditional military forces and the interagency component to achieve national objectives. Such a dynamic and varied environment demands flexibility, responsiveness, and adaptability not only from the individual Soldiers, Sailors, Airmen, and Marines, but also from the processes supporting them.

This strategic plan introduces several joint terms of reference: ***characteristic, competency, capability*** and ***joint qualification***.[4] In this context, characteristics are

[3] Introductory Overview of the Department of Defense, www.defenselink.mil/pubs/dod101, accessed 1 December 2005.
[4] Definitions provided in Annex C.

distinctive elements that are descriptive of “joint” billets. Said another way, characteristics are features, which in aggregate, help identify which billets are "joint" or have joint aspects. Competency refers to the higher level of learning outcomes described by specific knowledge, skill, ability and attitude affecting performance. Unit, force and/or individual capabilities are the broad set of abilities required to achieve a particular mission or objective. Further efforts are underway to more fully identify the specific joint competencies and characteristics needed for future joint forces.

The recently completed JOM Strategic Review put forth this hierarchical terminology to establish a supply-demand model. The Department is responsible for developing and effectively managing officers within this construct to ensure it has the capability or means to effectively accomplish its missions and goals. Bottom line, the characteristic of a billet drives the requirement for a competency (knowledge, skill, ability and attitude) desired in an incumbent to any joint billet which ultimately enhances the capability to achieve the mission.

The transition from a Joint Specialty Officer to "joint qualification" will be what makes the 21st century JOM system unique. Joint qualifications refer to a menu of conditions or standards relating to joint education/training/experience, more holistically described as JOD, which is pursued throughout an individual’s career. The continuum of joint qualifications will be adaptable across the spectrum of operational and support specialties, recognizing that every member contributes to the ability of the joint force to accomplish the Department's mission.

In looking ahead, our first task is to enhance the definition of jointness in the context of today’s 21st century environment. This enhanced definition may drive changes in how joint experience is recognized to include education, training, exercises and assignments. The proposed 21st century definition of human resources “joint matters” compels the DoD to reevaluate how joint billets are identified, how officers are developed to fill those positions and how they are recognized for their joint experience. Expanding and redefining "joint matters" also requires identifying joint characteristics.

The next step will be to create a system, or systems, capable of capturing and tracking that expanded joint experience pool. As we evolve our current joint community from a narrowly focused joint duty billet construct, we must develop a process to determine levels of qualification, structured similar to the acquisition corps model. This measure promotes the value of jointness throughout a career, rather than as a designation for an elite few.

The Department needs legislative support and complementing policy changes to bring this strategic vision to fruition. Once legislative enhancements are approved, the way ahead is to combine the efforts of the joint and Service communities, both active and reserve, to codify those outcomes into policy, determine those joint competencies essential to meet the needs of our nation and develop a system that equitably captures the military members' lifelong joint experience.

The creation of a dynamic 21st century JOM and JOD strategic plan is arguably long overdue. A short historical perspective provides insight into the genesis of jointness and further highlights the need for a continuing evolution.

BACKGROUND

In 1986, Title IV of the GNA codified joint officer personnel policies, providing specific personnel management guidance on how to identify, educate, train, promote, and assign officers to joint duties. The joint warfighting capabilities possessed by today's U.S. military matured as a result of the emphasis and impetus of the GNA. While the operational forces have developed into a comfortable state of jointness, the system used for JOM has not kept pace.

A March 2003 independent study[5] validated recommendations from previous studies and reports by also noting that JOM/JPME requires updating. The study suggests revising practice, policy, and law to more effectively meet the demands of a new era. This emphasis on a more dynamic system to achieve the GNA-envisioned jointness led DoD, in late 2003, to collaborate with the Joint Staff (JS), Services, and RAND, in a multi-phase strategic review of JOM and JOD. This review examined the demand for joint officers and the ability to produce a supply to meet the demand. It also assessed whether one-size-fits-all management is suitable to fit the supply-demand model. The review included an in-depth appraisal of the current Joint Duty Assignment List (JDAL), leading to recognition that there are different types, or levels of joint experiences.

More recently, the Ronald W. Reagan National Defense Authorization Act (NDAA) for Fiscal Year 2005 required the Secretary of Defense to develop a strategic plan for JOM and JPME that links JOD to the accomplishment of the overall missions and goals of the DoD. Explicit in the guidance was the requirement to go beyond a plan

[5] Booz Allen Hamilton, *Independent Study of Joint Officer Management and Joint Professional Military Education*, McLean, VA, 2003.

for only active duty officers. This strategic plan will also address joint officer development for officers on the Reserve Active-Status List. In addition, NDAA 2005 requested 13 specific matters be addressed in the strategic plan. Responses to these issues are found in Appendix - A.

DEPARTMENT OF DEFENSE MISSION & GOALS – THE STRATEGIC LINK

The Secretary of Defense, with the advice of the Chairman of the Joint Chiefs of Staff (CJCS), is responsible for ensuring the JOM system supports the overarching mission and goals of DoD. The CJCS is responsible for formulating policies for coordinating the military education and training of members of the Armed Forces.[6] JOM, the joint version of the personnel lifecycle as envisioned by the GNA, provides for the identification, education, training, promotion, and assignment of officers to joint duties. Inherent within JOD is the importance of the interdependence of joint education, training, and joint experiences. JOM and JOD are symbiotic in enhancing the joint warfighting capabilities of the Department. The importance of JOM and JOD is illustrated in their linkage to higher-level strategies.

Every component of the national command structure recognizes the need for jointness as a means of maximizing force capabilities. The National Security Strategy (NSS), the National Defense Strategy (NDS), and the National Military Strategy (NMS) advocate joint operations. A recurring theme throughout is the need for personnel to be trained, educated, experienced and qualified in joint operations.

The NSS provides broad strategic guidance on how joint operations should be conducted. As a reflection of the President's priorities it states: "innovation within the armed forces will rest on experimentation with new approaches to warfare, strengthening joint operations, exploiting U.S. intelligence advantages, and taking full advantage of science and technology."[7] The NSS goes further stating, that to meet strategic goals, alliances and command structures must be developed, and command structures must be dynamic and flexible to meet unique mission requirements. At the next level in the hierarchy of strategies, the Secretary of Defense provides his vision on the future of joint operations through the NDS, based on the 2001 Quadrennial Defense Review (QDR).

[6] Title 10, U.S.C. (a)(5)(c)
[7] The White House, *National Security Strategy of the United States of America*, September 2002.

The 2001 QDR was published in the wake of 9/11. It called for transformation in how military forces should be structured and utilized by strengthening "joint operations through standing JTF headquarters, improved joint command and control, joint training, and an expanded joint force presence policy…"[8] According to the QDR, a joint command and control structure must foster a joint culture. However, it recognized that this would present a "significant challenge to service and joint training and educational programs."[9] The Secretary of Defense also laid out a broader plan to create favorable security conditions around the world and to continue to transform how we think about security, formulate strategic objectives, and adapt to achieve success. This approach requires a high quality joint force that must remain committed to increasing levels of joint competency and capability.

The NMS states that achieving the objectives of protect, prevent and prevail requires connected joint operating concepts that provide direction on how the joint force will operate and provide a foundation for defining military capabilities.[10] The Capstone Concept of Joint Operations (CCJO) developed by the Joint Chiefs of Staff emphasized that highly qualified personnel, trained and educated to function within a joint force construct, will be the key to successful future military operations.[11]

The strategic link between the mission and goals of the Department of Defense and the vision for developing its personnel is paramount. The focus of the strategic plan contained herein will be on officers of the Active and Reserve Components. Additional studies are underway to identify the joint characteristics and capabilities required by senior civilian and enlisted personnel, as well as the senior leaders in the Reserve Components (RC).[12]

STRATEGIC OBJECTIVES FOR THE MANAGEMENT AND DEVELOPMENT OF JOINT OFFICERS

The original objectives identified in the GNA served DoD extraordinarily well for the past two decades. While we have made great strides in achieving the objectives of this landmark legislation, we recognize the need to modernize current joint management processes to enable a flexible joint qualified officer construct to meet both the

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[8] U.S. Department of Defense, *Quadrennial Defense Review Report*, September 2001.
[9] Ibid.
[10] Chairman, Joint Chiefs of Staff, *National Military Strategy*, 2004.
[11] Joint Chiefs of Staff, The Capstone Concept of Joint Operations, August 2005.
[12] National Defense Authorization Act 2005, §531(e) requires the Secretary of Defense to submit a report providing an assessment of, and initiatives to improve, the performance in joint matters of the following: (1) Senior civilians officers and employees in OSD, the Defense Agencies, and the military departments; (2) Senior noncommissioned officers; and (3) Senior leadership in the reserve components.

challenges of today and the future warfighting environment. For this reason, enhancements to the original objectives will ensure they remain viable well into the 21st century. These enhancements serve to make the original objectives relevant in a changing world and support the continued expansion of the community of nations with a common goal of freedom and equality for all.

Strategic Objectives	Action
Develop a JOM system relevant to 21st Century mission and force structure requirements.	**Increase flexibility in the established management assessment mechanisms, practices, policies, and statutes which act as controlling influences on joint operations and personnel.**
Produce the largest possible body of fully qualified and inherently joint officers suitable for joint command and staff responsibilities.[13]	**Enhance methods for delivering joint education, training, and experience across the spectrum of grades and specialties by establishing a joint learning continuum of four interdependent supporting pillars.**[14]
Develop a pool of fully qualified and inherently joint leaders for promotion to general/flag officer rank. [15]	**Ensure officers are strategically minded, critical thinkers who are skilled in those capabilities specific to joint warfighting. Shift focal point to growing the largest possible number of fully qualified and inherently joint colonels and captains.**
Maintain the quality of officers in joint assignments.	**Develop more robust tracking and management system for officer joint qualifications/competencies and directly link Service systems supporting assignment selection.**

EXPANDING THE HUMAN RESOURCE DEFINITION OF "JOINT" AND IDENTIFYING JOINT REQUIREMENTS

The GNA definition of "joint matters" found in Title 10, United States Code (U.S.C.), §668 provided a solid standard and common understanding as the Department strove to become joint.

> *matters relating to the integrated employment of land, sea, and air forces, including matters relating to national military strategy; strategic planning and contingency planning; and command and control of combat operations under unified command*

[13] CJCS Vision for Joint Officer Development, November 2005.
[14] See appendix B, JOD Vision, for description of the four pillars.
[15] A natural evolution of the original objective of the GNA which was to ensure that general and flag officers are well-rounded in joint matters.

However, the reality of how the U.S. military operates in the 21st century makes it prudent to expand that definition.

Today, a more effective characterization of human resources "joint matters" is:

matters involving the integrated use of military forces relative to national military strategy; strategic and contingency planning; and command and control of operations under unified command, which may be conducted with mult-service and/or multinational, interagency and non-governmental partners under unified action across domains such as land, sea, air, space and the information environment.[16]

This definition would fit with the data from the 2005 JOM Census survey. For example, JDAL billets appear to provide significant experience in multi-service, multinational, or interagency matters, as evidenced by responses to the survey. Eighty percent of JDAL billets provide experience in at least two of these areas and over 50 percent provide experience in all three. Non-JDAL billets in external organizations with some billets on the JDAL also provide significant amounts of "joint" experience as do some internal service billets. On average, respondents reported interacting with close to five organizations/agencies (not including their own service) on a monthly or more frequent basis. Among officers serving in JDAL billets, the number was even higher—over 7. Some billets, for example, those on the Joint Staff or OSD Staff involved interacting frequently with 11-13 organizations/agencies.

What is different 20 years after the Goldwater-Nichols legislation described the content of joint matters? Consider first the size and composition of the armed forces. Since 1986 the military has reduced its manpower by one-third. This reduction has led to a greater dependence on and integration with the other services and other government agencies. The military is increasingly required to operate in multi-service, interagency environments to conduct and sustain operations across a greater variety of domains. Another reality of our post-Cold War world is that multinational coalitions are integral for successful action on the global stage. Operation Desert Storm, Operation Enduring

[16] Examples of "domains" would include land, sea, air, space, and the information environment; this list is not all inclusive. We note that today's joint military operations are no longer simply the integration of two or more services, rather they are normally part of a unified action under the command and control of a combatant command. "Unified action" describes a wide scope of actions including synchronization of actions with governmental and non-governmental activities inside Unified Commands and their subordinates. This definition is clearly evolving to mean the synergistic employment multi-component forces from multiple services, multi-national forces, and governmental and non-governmental agencies across multiple domains. Integrating actions across various domains is at the heart of "Jointness."

Freedom, and the tsunami relief effort in Indonesia are examples of the U.S. military working with international partners to protect lives and defend freedom.

A final distinction which must be recognized in expanding the definition of the human resources aspect of "joint matters" is the new way in which military forces are aligned and deployed. JTFs now form the tip of the spear and they enable the horizontal integration of capabilities at operational and tactical levels while providing strategic results across the spectrum of conflict.[17]

The strategic approach to JOM and JOD also requires defining current and future joint characteristics to achieve operational success in future joint operations.[18] Such a strategic approach calls for a fresh look in identifying billets that *require* some prior joint experience, education, and/or training as well as those billets that *provide* joint experience. However, an in-depth review of billets throughout the Department has identified a significant number of billets not on the JDAL that also exhibit joint characteristics.[19] Accordingly, the JDAL, or its successor, should transform into a less process-intensive and mechanical approach to a more meaningful management tool. The data collection undertaken through the 2005 JOM Census survey was a first step in mapping out these requirements. Identifying appropriate levels of joint officer resources needed to support the Department's missions should be an on-going process. Equally important is the need to ensure these officers are appropriately developed in joint matters.

JOINT OFFICER DEVELOPMENT – THE FOUNDATION

"PME is the critical element in officer development and is the foundation of a joint learning continuum. The PME vision understands that young officers join their particular Service, receive training, and education in a joint context, gain experience, pursue self-development, and

[17] The CCJO and data from the 2005 JOM Census Survey show that about 17 percent of respondents had served at least two months in a temporary JTF billet as well as in a permanent joint duty billets. About 47 percent of these officers reported that they received an understanding of the joint environment more quickly while serving in the JTF billet than while serving in the permanent joint duty assignment billet. Most officers believe that the optimal JTF assignment should be about 6 months in length.

[18] This section draws heavily from Thie et al. (2005), *ibid.*

[19] Data from the 2005 JOM Census survey support this. For example, about 35 percent of respondents serving in JDAL billets with JPME II experience reported that their position required JPME II and another 17 percent that prior joint experience was required. Among those assigned to non-JDAL positions in external organizations with some JDAL billets, 21 percent believed that JPME II was required and 14 percent that prior joint experience was required for their billet. The percentages were lower among officers serving in internal service billets: 11 and 10 percent respectively. About 13-10 percent of officers in JDAL and non-service billets and 7 percent of those in internal service billets reported that *both* JPME II and prior joint experience was required

over the breadth of their careers, become senior leaders of the joint force."[20]

Almost 80 percent of today's U.S. military officers were accessed after the GNA was implemented. One could argue they have "grown-up" in the joint environment. This first generation of jointly immersed officers are coming of age and rising to the senior ranks. Make no mistake; this did not occur naturally or randomly. DoD, in concert with the CJCS, has focused on "continuously improving joint readiness by aligning joint education and training capabilities and resources with combatant command needs..."[21] Fundamental to managing the Department's human capital as a joint resource is the requirement to develop that resource.

The Chairman of the Joint Chiefs of Staff (CJCS) recently published the Capstone Concept for Joint Operations (CCJO), describing how future joint forces are expected to operate across the range of military operations in 2012-2025. The CCJO is the overarching concept of the family of joint concepts that guides the development of future joint capabilities. Those capabilities are developed through a combination of education, training, and past experience. The CJCS, as advisor to the Secretary of Defense, has articulated his vision for joint officer development.[22] This document establishes the objectives of JOD as producing "the largest possible body of fully qualified and inherently joint officers suitable for joint command and staff responsibilities." The complete document is located at Appendix-B but there are a number of points worth emphasizing below.

An officer's responsibility is to understand all facets of war – its causes, conduct, resolution, and after-effects. In other words, one must have the ability to understand second- and third-order thinking about human conflict. "The CCJO reiterates this belief and directly addresses JOD by stating that the future joint force 'requires knowledgeable, empowered, innovative, and decisive leaders, capable of leading the networked joint force to success in fluid and perhaps chaotic operating environments…(with) more comprehensive knowledge of interagency and multinational cultures and capabilities."[23] These officers must be *strategically minded, critical thinkers, and skilled joint warfighters*[24] in ways that allow them to lead a joint force.

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[20] CJSCI 1800.01C, Officer PME Policy (OPMEP), pg 1.
[21] OASD/PA. *Facing the Future: Meeting the Threats and Challenges of the 21st Century*, February 2005.
[22] *CJCS Vision for Joint Officer Development*, November 2005.
[23] Ibid, 2.
[24] The term "warfighter" is not limited to officers serving in the combat arms. It also applies to those who are skilled in the "capabilities specific to joint operations" whether in the conduct of war or operations other than war.

These broad descriptors[25] of joint leader competencies are central to JOD and require the development/refinement of approaches designed to instill those competencies.

The Secretary of Defense Training Transformation (T2) Implementation Plan directs that "joint training and education will be recast as a component of lifelong learning and integrated across the Total Force ….to develop officers well versed in joint operational art."[26] In support of this, the CJCS vision for JOD establishes a Joint Learning Continuum of four interdependent supporting pillars. These pillars are:

- Joint Individual Training (JIT)
- Joint Professional Military Education (JPME)
- Joint Experience
- Self-development[27]

Each of the four main pillars of the Joint Learning Continuum is briefly described below; a full description of these interdependent pillars is contained Appendix-B.

Joint Individual Training. Training and education are related facets of learning; basically, training is learning to do, where education is learning to think. Recognizing that joint knowledge is needed early in an officer's career, integral in the JIT pillar is that these are important skills to acquire before an officer reaches the grades of major and lieutenant commander. There are multiple delivery methods for JIT: in-Service training, traditional "school house" joint skill-specific training, or via distance education.

Joint Professional Military Education. JPME is at the heart of JOD.[28] Curricular content will be revised so that it is based on joint leader competencies described in the Chairman's vision for JOD.[29] Joint acculturation, now achieved through policy-mandated student and faculty mixes by military department, remains an integral aspect of JPME. The multiple levels of JPME described in law remain, as do resident and non-resident delivery approaches. Nominally, JPME I should be completed prior to promotion to lieutenant colonel or commander; JPME II should be completed prior to

[25] A near-term independent study shall assist in developing a final set.
[26] Department of Defense, 9 June 2004, "*Training Transformation Implementation Plan*"
[27] The majority of officers surveyed in the 2005 JOM Census Survey believed that joint training, education, and prior experience in a joint environment was desired or helpful to perform their duties successfully; close to 90 percent of officers serving in JDAL billets ranked JPME I, JPME II, other joint training/education, and prior experience in joint environment as important for the job.
[28] According to the 2005 JOM Census survey about 43 percent of those who had received credit for JPME I also had completed JPME II.
[29] CJCS Vision for Joint Officer Development, November 2005.

promotion to colonel or captain. Delivery approaches that use hybrid techniques (a mixture of resident and non-resident delivery) may be implemented for JPME II. Joint General and Flag Officer education opportunities remain a key component of JPME.

Self-Development. The self-development pillar of the JOD vision is about empowering individuals with responsibility to actively participate in their growth as professionals. Successful self-development is enhanced by commanding officer involvement, specifically in the commander's creation of an environment where self-development is both prized *and* expected. Self-study enhances an officer's development while allowing flexibility and accommodation to individual circumstances. Establishing testing and assessment protocols that credit officers for their individual developmental accomplishments rewards self-development; one should be able to test out of certain aspects of JIT or JPME when demonstrating mastery of aspects of the formal curriculum.

Joint Experience. Joint experience is a key learning opportunity; it is where education and training move from concept to reality. The intellectual understanding of conflict that is gained through experience rounds out the continuum of joint learning. The joint experience pillar implicitly recognizes that the successful application of what individuals learn via JIT, JPME, and self-development is essential. Learning to operate jointly is not an academic pursuit although it entails an understanding of the spectrum of conflict; its competencies must be demonstrated by practice. J*oint experience accrues where jointness is applied.* This plan underscores the need for a protocol for measuring joint performance in all its parameters e.g. a joint litmus test. This is an essential requirement for building a larger pool of jointly qualified officers.

RESERVE COMPONENT JOINT OFFICER DEVELOPMENT

Although the concept of the Total Force has been around for decades, the concept of jointness is only now on the eve of its 20-year anniversary; for the Reserve Component (RC), serving in joint organizations this is a much newer concept. Nevertheless, senior leaders have come to expect the same level of professionalism and readiness in the RC serving in joint organizations as they demand in active component officers.

Title 10, U.S.C., §666 requires the Secretary of Defense to "establish personnel policies emphasizing education and experience in joint matters for reserve officers not on the active-duty list." Recognizing the inherent differences in the natures of the active

and reserve components, such policies, to the extent practicable, were to be similar to the policies provided for active-duty list officers.

Reserve force use has increased dramatically since Operations Desert Shield and Desert Storm. Between 1991 and 2000 Reserve Component forces were involved in more than fifty named military operations or contingencies. Since September 11, 2001, over 450,000[30] RC personnel have been activated to participate in the Global War on Terrorism. These forces do not serve in isolation; they are integrated in joint organizations, from the battlefield to the planning staffs. In the past few years, "the number of RC officers assigned to joint organizations has risen sharply, to the point where approximately 4,400 Reservists and Guardsmen in grades from major/lieutenant commander through colonel/captain are now performing duty in these important units."[31]/[32]

Congress has recognized the need for joint senior RC leaders. The law[33] allows the Chairman of the Joint Chiefs of Staff to designate up to 10 general and flag officer positions on the staffs of the combatant commands as positions to be held only by reserve component officers who are in a general or flag officer grade below lieutenant general or vice admiral. The current and foreseeable environments necessitate expanding that opportunity beyond the general or flag officers so that reserve officers are given greater access to and subsequent recognition of joint experience in education, training, exercises and assignments.

Today's Reserve Component members have few opportunities ~~y~~ for joint experience and education due to geography and civilian employment. Reserve Component members who take advantage of advanced joint education and who are geographically situated to fill joint billets are largely self-selected. Other than the full-time Active Guard and Reserve force, RC members are not involuntarily relocated to fill positions. However, the type and tempo of current operations requires RC personnel who understand and can operate in a joint environment. This logic applies further to

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[30] Data as of 30 September 2005; provided by OASD/RA.

[31] Pickett, Dayton S., David A. Smith, Elizabeth B. Dial. *Joint Professional Military Education for Reserve Component Officers*, Logistics Management Institute, McLean, VA, November 1998.

[32] There were 679 reserve officers who were billet incumbents in the 2005 JOM Census survey (only 12 percent of whom were guardsmen). On average, these respondents had served 18 years as commissioned officers and about 14 months in the billet that they were asked to evaluate. Over a third of the reservists were tactical operations officers, 17 percent were intelligence officers, and 16 percent were supply, procurement, and allied officers. About one-quarter of them were serving in CENTCOM JTF billets, and close to one-quarter were assigned to various geographic commands. Their responses seemed quite similar to those of active duty officers in terms of the on-the-job experience, value of joint education and training, and the number and frequency of interactions with other organizations/agencies.

[33] Title 10, Unites States Code, §526 (b)(2)(A)

properly recognizing joint education and assignment accomplishments which will ultimately optimize RC integration into joint warfighting.

Theory and experience both point to the idea of "qualification" and suggest that there are positive correlations between education, experience, and job performance. However, officers could be allowed to achieve joint qualification through different combinations and sequencing of education and experience. For example, recent, intense (content of experience) or frequent (number of times) experience might count for basic joint qualification as might short experiences buttressed by education. Points could be assigned for months or years of specified experience or education/training. In addition, a formal review of career experiences in the form of an accomplishment record could also be used. Thus, one could use the types of systems described below to develop RC officers which could later be expanded to include the active component:

- Billet and minimum time qualification is sufficient (like current active component method).
- Point system to assess multiple but short duration instances of education, training and exercise experience (senior officer or board decision).
- Accomplishment record (senior officer or board decision).

The latter two involve increasing cost and administrative difficulty so standardization of processes, forms, protocols, and evaluation tools is important. We intend to build inherently joint RC officers recognizing that the careers of these officers require some adjustments in how this portion of the plan is executed.

JOINT OFFICER MANAGEMENT FOR THE 21st CENTURY

"The Demands of the 21st Century security environment are markedly different from those that shaped the manpower requirements and personnel systems and policies that are used in the (Defense) Department today. The current set of human resources policies and practices will not meet the needs of the 21st Century if left unchanged."
The Defense Science Board Task Force on Human Resources Strategy

Human resource management systems within the Services have evolved from a one-size-fits-all approach for assignments, education and training, to more flexible systems, responsive to the needs of the organization as well as the needs of the individual. It is time for the joint officer management system to adapt as well. This begins with recognizing that joint experience can be gained in a myriad of locations and organizational constructs. Another consideration is the level, or amount, of joint

experience attained by an officer is a function of its currency, frequency, and intensity rather than an arbitrary period of time in a billet. Now is the time to transition from a system where the Joint Specialty Officer (JSO) [34] designation is the only recognized level of joint capability to one that offers various levels of qualification based on joint experience.

Old

- Time-based Joint Duty Credit
- Joint Specialty Officer (JSO) is the pinnacle
- Definition of "Joint Matters" is narrow and limiting

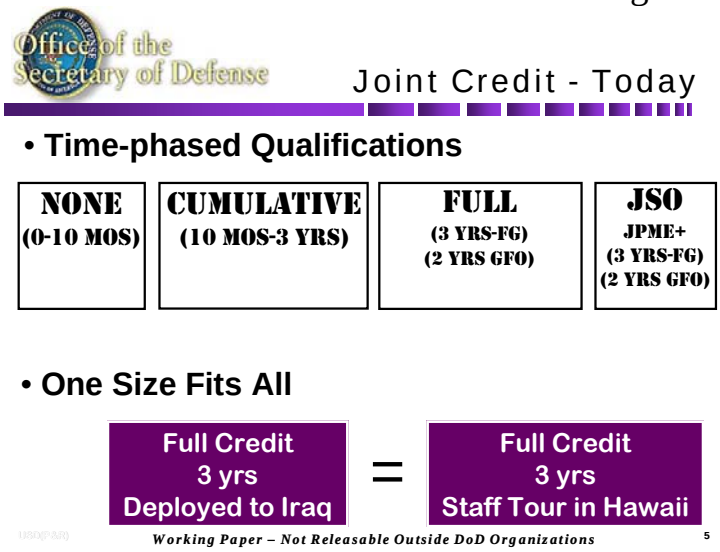

Figure 1 - Attributes of the current JOM system

The frequency, quality and intensity of the joint experience (as measured by the joint litmus test), along with joint education and training, must be the primary component in gaining joint duty qualification. Our current system does not account for job immersion and intensity. For example, current time requirements necessitate an intricate system of waivers with a one-size fits all approach. However, the law does not adequately address the exceptional experience gained in intensive or focused contingency operations staffs and the majority of combat joint assignments merit consideration equal to a full JDA experience as we know it today. The same argument can be applied to many one-year remote joint tours demonstrating the same level of intensity. Again, we should recognize and track levels of joint qualifications based on demonstrated competency and successful completion of tours in joint intensive environments versus simply fulfilling arbitrary tour lengths.

[34] Title 10, United States Code, Chapter 38, §661(a); "…officers of the Army, Navy, Air Force, and Marine Corps on the active-duty list who are particularly trained in, and oriented toward, joint matters…"

What does all this mean? In a macro sense it means jointness is no longer solely within the purview of billets on large staff organizations that promulgate strategy and policy. *Joint experience accrues where jointness is applied.* It also means a time-based or tour-length system of joint credit is no longer the single best indicator of joint expertise. It means the Department needs a more dynamic management system for the 21st century; a system, or systems, further imbuing jointness across the military services. Officers can, and do, gain valuable joint duty experience without credit for assignments not on the Joint Duty Assignment List (JDAL). Modernizing our legacy JDAL will better capture the "right" jobs warranting joint duty service recognition. Ultimately, we need to streamline the process to better measure the joint experience wherever it is applied and simplify the process for tracking and recognizing joint experience.

New

- Continuum of Joint Qualification
- Levels of Qualification fit the supply-demand model
- Definition of "Joint Matters" is more relevant to the 21st Century

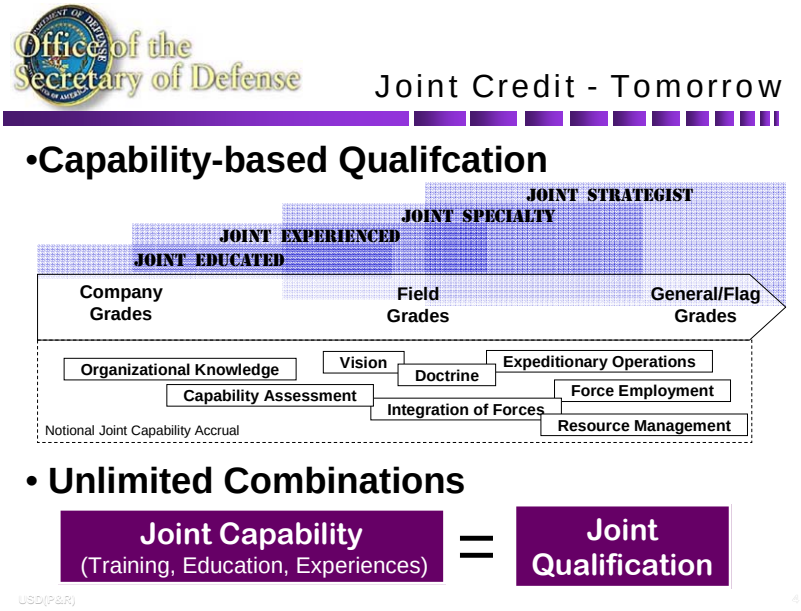

Figure 2 - Notional model of "Joint Continuum"

It is the intent of the Department to instill jointness throughout the Total Force by instituting a JOM/JOD system that is adaptive to the global operating environment by advocating the joint learning continuum and a continuum of joint qualifications. Like any profession, qualification will become the key to recognizing levels of expertise. While it is definitely the intent of JOM to ensure there is a large pool of fully qualified

and inherently joint leaders for promotion to flag rank, the greater need is for the Total Force to be imbued with joint competencies that allow them to synergistically support the Department's mission.

CONCLUSION AND NEXT STEPS

This document articulates the DoD strategy for managing and developing officers to become joint practitioners. This plan introduces a JOM/JOD strategy for the Services, ensuring they have the opportunity to incorporate joint characteristics, competencies and qualifications into their future developmental plans. The need for personnel with joint experience and education form the foundation for the DoD missions we execute. Current JOM and JOD needs cannot be met with existing practices~~;~~. Gaps (e.g., inefficiencies and inequities) identified as we prosecute the Global War on Terrorism and respond to local disasters serve as the basis for our recommended changes.

Changes to Title 10, U.S.C., and DoD policies will be required in order to achieve the full potential of this strategic plan for developing and managing the joint force. These changes will involve opportunities to validate the efficacy based on the JOD system, including expanded opportunities for both resident and non-resident joint education and training, and provide the required flexibilities to capture and track all joint experiences, not just those present in the static Cold War environment. These initiatives will provide the required flexibilities to ensure DoD can better meet today's challenges and the dynamic warfighting environment of the future.

Implementation of this visionary plan relies heavily on Congressional support for legislative initiatives that will give the Department the flexibility necessary to prepare officers for this new joint paradigm. It enables a joint force with a much more diverse set of capabilities, and allows for the integration and tracking of those capabilities. To that end, a streamlined qualification system must be developed to identify joint requirements and capabilities, and consequently better qualified personnel to meet the missions and goals of the Department.

We know that the joint officer of the future must be a joint strategic leader, critical thinker, and skilled practitioner of those capabilities specific to joint warfighting. As Service members become more senior, they must be competent in joint planning, the integrated application of force, national theater strategy, interagency and multinational workings, and possess regional and cultural expertise. The right mix of statute and policy enhancements will enable us to grow these kinds of jointly qualified officers in the quantity that DoD needs.

Recognizing transformation is not an end-state, this visionary strategic plan lays the foundation for the next generation of joint; the tenets of this document will later encompass the senior Reserve Component officers, senior civilians and enlisted personnel ultimately leading to "joint management" and "joint development." GNA has provided the path to operational success in the 20th century and the proposed enhancements to the GNA will carry this success into the 21st century.

APPENDIX – A

Issues from NDAA 2005, Section 531

NDAA 2005 Requirements

Subtitle D—Joint Officer Management and Professional Military Education

SEC. 531. Strategic Plan to Link Joint Officer Development to Overall Missions and Goals of the Department of Defense

(a) PLAN REQUIRED.—

(1) The Secretary of Defense shall develop a strategic plan for joint officer management and joint professional military education that links joint officer development to the accomplishment of the overall missions and goals of the Department of Defense, as set forth in the most recent national military strategy under section 153(d) of title 10, United States Code. Such plan shall be developed for the purpose of ensuring that sufficient numbers of officers fully qualified in occupational specialties involving combat operations are available as necessary to meet the needs of the Department for qualified officers who are operationally effective in the joint environment.

(1) A statement of the levels of joint officer resources needed to be available to properly support the overall missions of the Department of Defense, with such resources to be specified by the number of officers with the joint specialty, the number of officers required for service in joint duty assignment positions, and the training and education resources required. **[Page 24]**

(2) An assessment of the available and projected joint officer development resources (including officers, educational and training resources, and availability of joint duty assignment positions and tours of duty) necessary to achieve the levels specified under paragraph (1). **[Page 30]**

(3) Identification of any problems or issues arising from linking resources for joint officer development to accomplishment of the objective of meeting the levels specified under paragraph (1) to resolve those problems and issues and plans.
[Page 34]

(4) A description of the process for identification of the present and future requirements for joint specialty officers. **[Page 36]**

(5) A description of the career development and management of joint specialty officers and of any changes to be made to facilitate achievement of the levels of resources specified in paragraph (1), including additional education requirements, promotion opportunities, and assignments to fill joint assignments. **[Page 37]**

(6) An assessment of any problems or issues (and proposed solutions for any such problems and issues) arising from linking promotion eligibility to completion of joint professional military education. **[Page 39]**

(7) An assessment of any problems or issues (and proposed solutions for any such problems and issues) arising from linking prescribed lengths of joint duty assignments to qualification as joint specialty officers. **[Page 41]**

(8) An assessment of any problems or issues (and proposed solutions for any such problems and issues) arising from current law regarding expected rates of promotion for joint specialty officers and officers who are serving in, or have served in, joint duty assignments (other than those serving in, or who have served in, the Joint Staff and joint specialty officers). **[Page 43]**

(9) An assessment of any problems or issues (and proposed solutions for any such problems and issues) arising from current applicability of scientific and technical qualification waivers for designation as joint specialty officers. **[Page 45]**

(10) An assessment of the viability of the use of incentives (such as awarding ribbons) to any person who successfully completes a joint professional military education program of instruction. **[Page 46]**

(11) An assessment of the feasibility and utility of a comprehensive written examination as part of the evaluation criteria for selection of officers for full-time attendance at an intermediate or senior level service school. **[Page 47]**

(12) An assessment of the effects on the overall educational experience at the National Defense University of a small increase in the number of private sector civilians eligible to enroll in instruction at the National Defense University.
[Page 48]

(13) An assessment of the propriety and implications in providing joint specialty officer qualification to all qualifying reserve offices who have achieved the statutory prerequisites. **[Page 49]**

(c) INCLUSION OF RESERVE COMPONENT OFFICERS.—In developing the strategic plan required by subsection (a), the Secretary shall include joint officer development for officers on the reserve active-status list in the plan.

(d) REPORT.—The Secretary shall submit the plan developed under this section to the Committees on Armed Services of the Senate and House of Representatives not later than January 15, 2006.

(e) ADDITIONAL ASSESSMENT.—Not later than January 15, 2007, the Secretary of Defense shall submit to the Committees on Armed Services of the Senate and House of Representatives, as a follow-on to the report under subsection (d), a report providing an assessment of, and initiatives to improve, the performance in joint matters of the following:

(1) Senior civilian officers and employees in the Office of the Secretary of Defense, the Defense Agencies, and the military departments.

(2) Senior noncommissioned officers.

(3) Senior leadership in the reserve components.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(1) A statement of the levels of joint officer resources needed to be available to properly support the overall missions of the Department of Defense, with such resources to be specified by the number of officers with the joint specialty, the number of officers required for service in joint duty assignment positions, and the training and education resources required.

DISCUSSION

The current and projected supply of joint officers depends crucially on the availability of resources that create joint-qualified officers –under current statutes and policy this would mean JPME II seats and JDAs—as well as officer retention. The response below is predicated on the JOM system in place today, one that the Department envisions will transition from a one-size-fits-all time-based credit system, to one that recognizes varying levels of qualifications; a continuum of jointness throughout the personnel life-cycle.

A strategic workforce plan determines levels of critical characteristics needed to carry out missions and goals; assesses current availability of them now and in the future; and develops policies to eliminate gaps. Response to the Congressional request addresses these three issues. Data presented here is preliminary and is being more fully analyzed.

It is important to understand future need for joint officer resources in order to be able to produce these resources to match the determined need. There are three well-known requirements in law from which we can infer need for one or the other of two critical workforce characteristics: joint experience and joint education. First, the requirement for officers to have completed a JDA prior to promotion to general or flag rank sets a requirement for joint experience for most of the approximately 900 general and flag officer positions.[35] There is also a requirement to fill 800 critical positions with JSOs that sets a requirement for officers in these positions to have successfully completed JPME II and a prior JDAL assignment. Third, the requirement to fill at least half the JDAL positions with a JSO or JSO nominee sets a requirement for 50+ percent of JDAL positions to be filled with officers who have completed JPME II. Currently, this need for joint officer resources is only identified by the 800 critical billets, however, data

[35] For some officers, such as doctors, the Secretary of Defense may waive this requirement.

gathered in the 2005 JOM Census survey to investigate this need, suggests that the need for such resources is more widespread.

In the 2005 JOM Census survey, respondents identified, among other aspects, the level of need for joint education and prior joint experience. Specifically, participants were asked questions pertaining to JPME II and prior experience in a joint environment and whether they found each "required," "desired," or "not helpful" in order to perform their duties successfully.[36] Respondents in the Census survey have been grouped in three clusters: positions currently on the JDAL, positions in organizations external to the military departments but not on the JDAL, and positions within the military services.

Table 1 displays the results for JPME II and prior joint experience in terms of JDAL billets, non-JDAL billets in external organizations, and billets nominated by each of the services. Table 2 reports combined data for JPME II and prior joint experience, specifically, those who answered "required" for both questions, those who answered "not helpful" for both questions, and a column combining variations of "required" and "desired" responses.

[36] Questions regarding JPME I and II also included a choice of "Not sure – have no JPME experience."

Table 1. Need for JPME II or Prior Joint Experience, O-3—O-6

Billet Organization	JPME II					Prior Joint Experience			
	Required	Desired	Not helpful	Not sure—have no JPME II experience	Missing	Required	Desired	Not helpful	Missing
JDAL billets	1386	2365	337	1839	201	1030	4236	660	202
Non-JDAL billets in external organizations	401	1246	276	2154	206	559	2882	636	206
Service-nominated billets									
Army	193	809	312	2099	232	385	2083	945	232
Navy	47	332	284	1027	72	147	898	645	72
Air Force	144	950	484	2303	172	335	2351	1195	172
Marine Corps	1	25	5	18	7	7	34	8	7
Total	2172	5727	1698	9440	890	2463	12484	4089	891

Table 2. Need for JPME II and Prior Joint Experience, O-3—O-6*

Billet Organization	JPME II/Prior Joint Experience		
	Required/Required	Required/Desired, Desired/Desired, Desired/Required	Not helpful/Not helpful
JDAL billets	470	3035	109
Non-JDAL billets in external organizations	167	1398	98
Service-nominated billets			
Army	127	825	157
Navy	27	342	172
Air Force	69	959	310
Marine Corps	0	24	3
Total	860	6583	849

Note: The table does not include those who said one area was "required/desired" and the other "not helpful" or were missing data on both questions. Approximately 7000 respondents who did not have JPME II said that prior joint experience was "required" or "desired." They are not included in the table.

Need for JPME II

Among the approximately 20,000 respondents in billet grades of O-3 – O-6, a large number (n=~9,500) had not had JPME II and so did not answer the question. Among those who did:

- About 2,200 believed that JPME II was "required" for their billet and most of them (1,366) were in JDAL billets
- Close to 6,000 believed that JPME II was "desired", about 1300 of whom were in non-JDAL billets in external organizations and about 2100 in service-nominated billets
- About 1,700 believed that JPME II was "not helpful."

Need for Prior Joint Experience

Large numbers of respondents believed that prior joint experience was required/desired in order to carry out their assignments successfully:

- About 2,500 said prior joint experience was "required" for their billet, about 1,000 of whom were in JDAL billets
- About 12,500 responded that such experience was "desired," of whom 3,000 were in non-JDAL billets in external organizations and about 5,200 of whom were in service-nominated billets
- About 4,100 said such experience was "not helpful," and most, not surprisingly, were in service-nominated billets.

Need for JSOs

If we examine the intersection between the responses to the two questions, we get an estimate of the numbers of billets where both joint education and prior joint experience is believed to be essential, indicating a need for JSOs:

- About 860 billets were identified as needing both joint education and prior joint experience, of which only about half were JDAL billets ("required/required"). This indicates that there are non-JDAL billets both in the external organizations and in the services that may need JSOs
- Over 6,500 billets were identified as billets where such education and prior joint experience may be desired or at least one of them required and the other desired for successfully carrying out the assignment

- Only about 849 of all respondents reported that neither education nor prior joint experience was helpful for their billet, approximately 100 among the JDAL and non-JDAL billets in external organizations and about 600 in the service-nominated billets.

Estimating Future Needs

These data can be used to make rudimentary estimates of the number of billets to be filled by officers with joint experience, with joint education, or both (JSOs). These estimates will be refined as part of the continuing analysis of the 2005 JOM Census Survey.

The most conservative assumption is that, since the data collection was designed to be a census of incumbents and supervisors, those who responded accurately described billet needs and those billets for which there is no response do not need officers with education and experience characteristics to fill them. In this case:

- 860 billets must be filled by JSOs (required/required)
- About 7,040 positions (either required or desired) should be filled by officers with JPME II (not including JSOs)
- About 14,100 positions (either required or desired) should be filled by officers with joint experience (not including JSOs)

A more likely assumption is that respondents on the JDAL have similar billet characteristics to those who did not respond. In that case, we project billet needs to the full current JDAL (but not to the other organizational clusters) and the following results:

- 1,040 billets must be filled by JSOs
- About 8,300 positions (either required or desired) should be filled by officers with JPME II (not including JSOs)
- About 15,900 positions (either required or desired) should be filled by officers with joint experience (not including JSOs)

A more extreme assumption is that respondents not now on the JDAL in the two other organizational clusters have similar billet characteristics to those who did not respond. In that case, we project billet needs for all organizational clusters, with the following results:

- 1,210 billets must be filled by JSOs
- About 9,900 positions (either required or desired) should be filled by officers with JPME II (not including JSOs)
- About 19,900 positions (either required or desired) should be filled by officers with joint experience (not including JSOs)

These data provide a first cut at the need for JSOs, joint education, and experience across this set of billets. It is clear that non-JDAL billets and service-nominated billets would benefit from such prior joint experience and education. The ranges are

- About 860-1,210 billets would benefit from both education and joint experience
- About 7,040-9,900 billets would benefit from JPME II
- About 14,100-19,900 billets would benefit from prior joint experience.

These assumptions have used the total number of JDAL billets identified in our survey, about 8,500. Given that the number of JDAL billets is higher—over 9,700—the total number of estimated billets requiring JSOs, JPME II, and/or prior joint experience, is likely to be higher than estimated here. We chose the more conservative numbers simply because these are based directly on data from the surveyed billets.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(2) An assessment of the available and projected joint officer development resources (including officers, educational and training resources, and availability of joint duty assignment positions and tours of duty) necessary to achieve the levels specified under paragraph (1).

DISCUSSION

Under the Joint Officer Management (JOM) construct, as prescribed by Chapter 38, Title 10, U.S.C., the Department of Defense (DoD) is limited in acknowledging many of the experiences that contribute to the development of our joint force. Section 668 states that by definition a joint duty assignment (JDA) "shall be limited to assignments in which the officer gains significant experience in joint matters and shall exclude—(A) assignments for joint training or joint education; and (B) assignments within an officer's own military department." A former Vice Chief of Staff of the Army noted that multiple opportunities to command a joint task force during training exercises provided a wealth of joint experience he never received credit for. This is a prime example of why it is time to think more broadly about what constitutes a joint officer development resource. The joint force management system must be flexible and responsive to opportunities to gain experience in joint matters in the ever-changing global geo-political environment we live in.

The current and projected supply of joint officers depends significantly on the availability of resources that create joint-qualified officers – education (JPME II), training (to include joint/combined exercises), and assignments (both permanent and temporary duty). These three elements provide credible joint experiences upon which the 21st Century JOM system is based. The following assessment takes a forward-look at the education, training, and assignment resources that will underpin the joint-qualified officer of the 21st Century.

CURRENT SUPPLY OF JOINT OFFICERS

Officers with Joint Experience. The percentage of officers (0-4 and above) with some previous joint experience has been increasing over time. 2002 data shows that between 30-40 percent of these officers in each service, excluding health occupations, had been

assigned to a JDA (including those with partial credit or "currently serving" in a JDA at that time). The percentage of 0-4s who have ever served in a JDA holds reasonably steady between 15 and 25 percent in each service but the percentages for 0-5 and 0-6 are much higher. Were it not for the current time-based management system that is oblivious to joint competencies and capabilities accrued via intense joint experiences, these percentages would undoubtedly be higher. According to RAND, data shows that for three of the four services, 65-75 percent of the tactical operations 0-6s had been exposed to joint experience although only 40 percent had been accredited with jointness.

Billets Available to Provide Joint Experience. The current number of billets on the Joint Duty Assignment List (JDAL) is around 9,000 – the only JDAs for which an officer can get joint duty credit. However, in the present environment, more officers are gaining credit for joint experience through cumulative service in designated JTFs and through use of SecDef waiver authority. But this "spike" in experience will dissipate over time as officers leave service. The number of joint-experienced officers will remain stagnant unless the Department transitions from a time-based system to one that acknowledges the accrual of competencies and capabilities resulting in various levels of joint qualifications,

JPME Seats to Provide Joint Education Credit.
Currently, there are a total of 1,172 seats that are authorized and certified for JPME II credit. This includes 124 seats at the National War College (NWC), 180 seats at the Industrial College of the Armed Forces (ICAF), 840 seats at the Joint and Combined Warfighting School (JFSC), and 28 seats at the Joint Advanced Warfighting School (JAWS). Thus, the maximum number of JPME graduates that could be assigned to JDAs each year is 1,172. However, given the need for some graduates within the services, not all of these graduates will be assigned to JDAs.

Joint Officer Development (JOD) resources will take advantage of the four interdependent supporting pillars of the Joint Learning Continuum: Joint Individual Training (JIT), JPME, Joint Experience, and Self-development. Educational opportunities are at a premium due to limited seats and operations tempo however, delivery methods that take advantage of technology may expand benefits to more officers. The experience gained during joint training exercises, temporary duty in JTFs, and regular JDAs must be assessed and tracked more effectively (via a capabilities-based qualification system) in order to capture the vast amount of joint development being accrued on a regular basis.

PROJECTED SUPPLY OF JOINT OFFICERS

JPME Seats. The projected supply will increase at least partly because of the increase in the number of eligible JPME II seats. The number of JPME II seats will increase to 1908 as senior-level service programs become eligible for future accreditation for JPME II. These include 227 seats at US Army War College; 312 seats at US Navy College of Naval Warfare; 13 seats at US Marine Corps War College; and 184 seats at US Air Force Air War College.

While there will be more JPME II graduates available in the future, the likely assignment outcome from all schools to joint assignments will be around 60 percent. More joint billets could be supported by increasing further the number of JPME II seats, by increasing the percentage of JPME grads assigned directly to joint positions, or by increasing the number of JSOs assigned to joint positions. For example, more JPME II graduates who serve in qualifying billets produce more JSOs under the current management system.

Billets Available to Provide Joint Experience.

Current law restricts in-service billets from receiving joint credit. One frequent criticism of the system is that officers are serving in other assignments that provide a rich joint experience but do not grant the officer joint credit. Likewise, there are officers serving in assignments on the JDAL that may not provide what some would consider a joint experience, either because of the content or context of their work or because of limited interaction with other services, nations, or agencies.
The 2005 JOM Census Survey provides data on the kinds of experiences that non-JDAL billets provide. Respondents were asked about whether their billet provided "significant experience" in multi-service, multinational, or interagency matters. Of the over 20,000 respondents who answered this set of questions, approximately 16,000 (79 percent) agreed or strongly agreed that the billet provided them with one or more of these kinds of experiences. The following table shows the distribution of the billets identified by the JDAL status of the billet.

Billet Status	Number of billets providing at least one kind of "joint" experience (multi-service, multinational, or interagency)	Total Number in Survey
JDAL Billets	5589	5937
Non-JDAL billets in external organizations	3833	4271
Service-nominated billets	6525	10048
Army	2467	3708
Navy	1274	1962
Air Force	2736	4317
Marine Corps	48	61
Total Non-JDAL & Service-nominated billets	10,358	14,319

Figure 3

This is obviously only one of several criteria that could be used to determine a valid joint experience. Subsequent analysis will use billet-level data to assess the degree of jointness the billet provides to officers, using multiple criteria such as amount or level of interaction and duties, types of experience, knowledge, and education required for the job, and other factors.

Nonetheless, the implication for projected joint officer supply is significant, if a new JDAL or other means to determine joint qualifications is based on a more equitable interpretation of the current philosophy and includes either all officers at joint organizations, selected internal service billets or both.

Tour Lengths.
The current JDA tour length is 36 months. If the tour length is decreased, then the projected supply would increase as officers cycle through JDAs faster than before. The analysis will consider the implications of shorter tours of duty on projected supply.

Assessment.
The projected supply of joint officers should increase, given the increase in JPME II seats. If a more equitable interpretation of joint duty assignments is adopted or shorter tour lengths become the norm, then the services should experience a marked increase in "jointness" of the officer corps. More definitive assessments will be available at the conclusion of the RAND analysis.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(3) Identification of any problems or issues arising from linking resources for joint officer development to accomplishment of the objective of meeting the levels specified under paragraph (1) to resolve those problems and issues and plans.

DISCUSSION

In response to paragraph (1), we identified the levels of joint officer resources needed in order to properly support the overall missions of the Department of Defense (DoD). The reply was framed based on statutes and policies currently in place and on the management data available for analysis. Our assessment of available and projected joint officer development resources to meet the paragraph (1) requirement of this legacy Joint Officer Management (JOM) system indicated that the supply of joint officers should increase given current initiatives expanding the availability of JPME II seats. However, the most important issue to be identified here is not maintaining a legacy 20th century joint force, but ensuring we have an inherently joint Total Force (officer, enlisted, civilian, Active and Reserve) prepared for the 21st Century.

The term "joint Total Force" does not imply that individual Service capabilities and competencies will be marginalized. On the contrary, they form the foundation for joint competencies and joint capabilities.

Problem/Issue: Transitioning from a static, time-based, system of developing personnel experienced in joint matters to one that recognizes varying levels of joint qualifications requires more flexible methods of delivering JPME II within a resource constrained, high ops-tempo environment. Proposed alternatives for expanded JPME-II delivery include:

a. Authorizing a blended/hybrid delivery of JPME II at Joint Forces Staff College (8 weeks of resident and 2 weeks of non-resident instruction) would increase throughput - raising the number of annual JPME II graduates from 840 to 1,150.

b. Authorizing accredited Senior Level Service Schools to deliver JPME II via non-resident modes will provide opportunity for over 37,000 lieutenant colonels/commanders and colonels/captains to gain critical knowledge and tools for operating in the joint environment.

RECOMMENDATION

Seek legislative authority for the blended/hybrid delivery of JPME II at Joint Forces Staff College and to allow accredited Senior Level Service Schools to deliver JPME II via non-resident modes.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(4) A description of the process for identification of the present and future requirements for joint specialty officers.

DISCUSSION

The present system for identifying requirements appropriately relies upon joint organizations to forward their requirements to the CJCS for consideration. The CJCS in concert with the OSD has established a review panel to evaluate each position using the standards established in law and policy. This review occurs semi-annually and on an as needed basis for emerging requirements. While this has been adequate for the relatively static list of joint duty assignment positions, a much more responsive system is envisioned for the future.

The proposed system will establish objective criteria for each joint characteristic or capability. The criteria will then be more readily evaluated against positions and individuals. For each billet identified as requiring or benefiting from prior joint experience, education, and/or training, the kinds of experiences/training/education that are required or desired for the billet (multiservice experience, interagency experience, multinational experience, job-specific joint training, general joint education). Identifying these contributory elements will lead to better informed development decisions.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(5) A description of the career development and management of joint specialty officers and of any changes to be made to facilitate achievement of the levels of resources specified in paragraph (1), including additional education requirements, promotion opportunities, and assignments to fill joint assignments.

DISCUSSION

Management frameworks can be used to link management practices more closely to objectives for joint officer management. There are at least four ways of developing and managing officers to better meet needs for joint officers:

(1) Managing Leader Succession is a career management system that is most appropriate to the service line communities from which future leaders are being developed. It would feature relatively shorter joint assignments to develop officers faster and higher promotion and retention rates for officers who had served in joint assignments. This would ensure that general and flag officers had gained the relevant and required joint experience.
(2) Managing Competencies is a system appropriate to occupations that are already highly joint and would result in something like a joint cadre. The main feature of such a system is that officers who served in a joint assignment would be highly likely to serve repeatedly in joint assignments for longer periods of time. This joint experience would come at the cost of maintaining a service expertise, depending on occupational specialty and thus, these officers would not have the same opportunity to be promoted to general and flag officer ranks.
(3) Managing Skills is a system designed to distribute joint experience through the officer corps and is particularly appropriate for services that emphasize equity or are reluctant to identify future leaders. The system would give greater weight to maximizing the number of officers who have joint experience not necessarily on limiting the experience to the highest quality officers. Thus, this model sends more average officers to joint assignments and promotes and retains them at average rates but has the downside that senior leadership may not necessarily have the requisite joint experience.
(4) Managing the Exception, the historical method for managing joint assignments, focuses on positions and does not systematically develop joint experience or

invest in people or senior leadership. It simply focuses on “Who is available when we need someone?”

We note that a single management framework may not apply to all communities in all services. The intent is achieve an effective joint officer management infrastructure through the redesign of existing practices to provide for alternatives paths that recognize the full spectrum of joint capabilities present in today’s operating environment.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(6) An assessment of any problems or issues (and proposed solutions for any such problems and issues) arising from linking promotion eligibility to completion of joint professional military education.

DISCUSSION

a. Problem/Issue: This change would link promotions to a qualification (JPME) vice individual performance. Title 10, U.S.C. already addresses promotion policy objectives for Joint Officers.

(1) Example: The Army promotion system allows 0-6 promotions to occur prior to, or during, attendance at a Senior Level School.

(2) Example: The Air Force promotion system uses a "whole person" process and the promotion board charge specifically calls out the importance of joint duty experience.

(3) Example: The Navy promotion system is aligned to allow promotions based on the needs of the Service and individual performance.

b. Problem/Issue: There is not enough throughput, even after the Service War Colleges' in-residence curriculums are JPME II certified in 2006, to accommodate all eligible officers.

c. Problem/Issue: Non-line/Special Branch corps and the Reserve components do not have permanent Joint Duty Assignment List (JDAL) billets and are not required by law to complete JPME. Therefore, linking their promotion eligibility to JPME completion is not warranted.

(1) Proposed Solution: Promotion eligibility, for all levels (O-5, O-6, GO/FO) of the non-line/special branch and Reserve component, should remain the same as the line active duty (i.e., not linked to JPME).

d. Problem/Issue: Beginning in FY08, selection for promotion to GO/FO will require Joint Service Officer (JSO) designation.

(1) Proposed Solution: None required. The JSO designation requires

completion of JPME II. Therefore, the link between promotion eligibility and completion of JPME is already in place at the most senior level.

e. Problem/Issue: GWOT, particularly for the Army and Marine Corps, is affecting officers' availability to attend Intermediate Level Education (ILE) for JPME I credit, even via the distance learning programs. The same problem applies to the JPME II resident courses.

RECOMMENDATION

Do not link O-5/O-6 promotion eligibility to completion of joint professional military education.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(7) An assessment of any problems or issues (and proposed solutions for any such problems and issues) arising from linking prescribed lengths of joint duty assignments to qualification as joint specialty officers.

DISCUSSION

The RAND analysis will model the impact of different tour lengths on the ability of the services to develop joint officers. Data from the 2005 JOM Census survey may shed some light on the thoughts and opinions of officers serving in joint and potentially joint billets.

Currently most JDAs are 36 months in length. On the 2005 JOM Census survey, the median planned length of assignment for most officers was 36 months for those assigned to JDAL billets and on-JDAL billets in external organizations and, on average, most believed that this was the optimal length for these tours of duty. Officers in JDAL billets reported that it took about five months to become comfortable operating in a joint environment; it was a little shorter for those in non-JDAL billets in external organizations – about three months. The 25th percentile was 2 months and the 75th percentile was 6 months so the idle 50 percent of officers reported that it took between 2 to 6 months to become comfortable in a joint environment.

The tour of duty for officers in billets internal to the services was shorter—24 months—and like the others, officers believed that this was the optimal length for the assignment. On average, it took about four months to become comfortable in these billets.

All officers held similar views about the optimal length of temporary joint task force assignment. Regardless of where they were assigned, on average, officers believed that the optimal median length of such tours should be 6 to 7 months, and the majority of responses ranged from 6 months to over one year. About 25 percent of officers believed that the assignment should last one year or longer.[37]

Officers serving in assignments that were one to two years in length reported that the optimal length of a permanent JDA was about 24 months, while those serving in longer

[37] Responses varied among those serving in internal service billets. The range between the 25th and the 75th percentiles (middle half of the distribution) was 6-12 months for Army and Marine Corps officers, 4-8.5 months for Navy officers, and 4-6 months for Air Force officers.

assignments (the majority of whom were serving three-year tours) believed that the optimal length of permanent assignments was 36 months.

There was no difference in the responses by whether individuals had received credit for JPME I or JPME II. Higher ranked officers appeared to become comfortable in a joint environment more quickly than other officers. Those assigned to CENTCOM JTF billets also reported becoming comfortable working in the joint environment within a very short period of time—one month.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(8) An assessment of any problems or issues (and proposed solutions for any such problems and issues) arising from current law regarding expected rates of promotion for joint specialty officers and officers who are serving in, or have served in, joint duty assignments (other than those serving in, or who have served in, the Joint Staff and joint specialty officers).

Key Points

a. Before NDAA 2002, promotion policy objectives for JSOs were at a rate not less than the rate for officers of the same armed force in the same grade and competitive category who were serving on the headquarters staff of their armed force (headquarters average).

b. NDAA 2002 changed the promotion policy objectives for JSOs:

(1) Between December 28, 2001 and ending December 27, 2004, JSOs are to be promoted at a rate not less than the rate for officers of the same force in the same grade and competitive category (board average); and after December 27, 2004, JSOs are to be promoted at a rate not less than the headquarters average.

c. NDAA 2005 extended the NDAA 2002 JSO promotion policy objectives by two years to December 27, 2006 for JSOs to be promoted at a rate not less than the board average and after December 27, 2006, not less than the rate for the headquarters average.

DISCUSSION

a. Analysis of promotion objectives for JSOs:

(1) Historically, before NDAA 2002 temporarily lowered the JSO promotion policy objective rates to board average in 2002, the Services missed the JSO promotion objectives 46% of the time.

(2) Since the JSO promotion policy objectives were lowered, all Services have met the objectives for O-6s. After 2003, the Services have met the objectives for O-5s, except for one Service which missed it by less than one percent.

b. Analysis of promotion objectives for officers serving in JDAs:

(1) Historically, the Services have missed the O-6 promotion policy objectives by 67%. One Service has missed the O-6 objective every year for 18 consecutive years, although the FY06 rate was missed by one percent. Selection of two officers would have exceeded the promotion objective. Two Services made objectives the last two years, and the final Service achieved this objective last year.

(2) Historically, the Services have missed the O-5 promotion objectives by 20%, although one Service accounts for over half of that amount (missed objectives 10 out of 19 years). The other three Services have made objectives since 1995.

c. Overall the Services have made significant improvement in meeting Joint promotion expectations.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(9) An assessment of any problems or issues (and proposed solutions for any such problems and issues) arising from current applicability of scientific and technical qualification waivers for designation as joint specialty officers.

DISCUSSION

Problem/Issue: The nomenclature "scientific/technical" is not broad enough to encompass all specialties with limited joint requirements; the specified intent of the waiver. Since this naming convention has limited force in law, the principal reason for change is to provide a more accurate representation of the intent of the waiver provision. The specialties eligible for such waivers are listed in Figure 4.

Scientific:
Chemical, Oceanography, Weather, Engineer (Civil Engineer Corps, Engineering Duty Officer, Aeronautical Engineering Duty Officer, Scientific & Development Engineer)

Technical:
Acquisition Professionals, Aviation Maintenance, Comptroller/Finance, Educations & Training, Law Enforcement/Military Police, Missile Maintenance, Ordnance, Public Affairs, Research & Development Program Management, Services

Figure 4 Specialties within the Scientific and Technical Categories

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(10) An assessment of the viability of the use of incentives (such as awarding ribbons) to any person who successfully completes a joint professional military education program of instruction.

DISCUSSION

a. JPME is veined in Service PME. PME completion is therefore intrinsically linked to promotion

b. PME/JPME progression and completion is perceived by most service-members as de facto promotion and administrative board selection criteria

c. PME and appropriate JPME has substantive emphasis in Service career progression policies

d. A JPME ribbon may tend to dilute the significance of other personal/unit awards worn by Service members

e. Enhanced personal or monetary awards would tend to exacerbate an already strained resource allocation environment

RECOMMENDATION

The use of additional incentives is not necessary to enhance individual completion of a JPME program of instruction.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(11) An assessment of the feasibility and utility of a comprehensive written examination as part of the evaluation criteria for selection of officers for full-time attendance at an intermediate or senior level service school.

DISCUSSION

a. PME and associated JPME are valuable and integrated pieces of Service career progression policies

b. Service ILE/SLE selection board processes consider past [operational] performance, record of service, and potential for future service and promotion as criteria for in-resident education

c. One Service has a goal for 100% of officers to attend in-residence ILE

d. Assessment Tests (post-matriculation) are used to enhance curricula development and delivery as well as counseling for elective courses

e. ILE/SLE failure rates do not indicate student quality concern

RECOMMENDATION

A comprehensive written exam adds little value to the extant administrative processes in place to assign quality officers to intermediate and senior level schools. Written exams should not be used as a screening device for selection to attend JPME.

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(12) An assessment of the effects on the overall educational experience at the National Defense University of a small increase in the number of private sector civilians eligible to enroll in instruction at the National Defense University.

DISCUSSION

a. Student body size and composition are closely managed based on physical capacity and financial resources of the University. Student-to-faculty ratios are strictly monitored IAW Title 10, U.S.C., for program accreditation

b. U.S. Government students and (private sector) Industry Fellows (IF) add a valuable perspective to the JPME experience for both student populations

c. CJCS has endorsed an IF increase (from 10 to 20) at Industrial College of the Armed Forces (ICAF) which will increase the overall class size of the college to 320.[38] This proposal will not decrease the number of military JPME seats (currently 180) but will require an increase in faculty to support the larger class size.

RECOMMENDATION

The Department is pursuing an increase in private-sector enrollment at NDU to 20. Additionally, the Department supports additional financial resource requirements to appropriately increase the ICAF faculty to support a larger class size.

[38] DJSM 0824-05, 26 July 2005

MATTERS TO BE INCLUDED.—As part of the strategic plan, the Secretary shall include the following:

(13) An assessment of the propriety and implications in providing joint specialty officer qualification to all qualifying reserve officers who have achieved the statutory prerequisites.

DISCUSSION

The prerequisites of joint education and joint experience as qualifications are the important considerations and not the label associated with such qualifications. That being said, the Department supports the concept of a single active and reserve joint qualification standard with alternative, flexible avenues to that qualification. The Department also believes it would be desirable to recognize those Reserve Component (RC) officers who have met the current statutory prerequisites for Joint Specialty Officer (JSO) designation. However, the statutory resident education, assignment, and promotion requirements associated with the JSO designation are often incompatible with part-time reserve service and reserve officer management. Officers whose personal and employment circumstances permit attendance at resident education and who are able to travel as required to fill joint billets are largely self-selected, or part of the full-time Active Guard and Reserve force, and may not be best candidates for joint qualification, simply the available candidates. Full realization of the improvements in joint officer development and joint officer management discussed in this strategic plan will enable the Department to develop joint-qualified officers from a wider Reserve population. The term, "fully joint qualified" is equally appropriate for the Reserve Component. DoD has asked RAND to analyze the appropriate education and experience qualifications for reserve officers as part of their study on reserve component joint officer management. This study will contribute to the development of a system for tracking and developing joint characteristics for Reserve Component officers.

APPENDIX - B

CJCS Vision for Joint Officer Development

CJCS VISION FOR

JOINT OFFICER DEVELOPMENT

November 2005

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Table of Contents

Chairman's Foreword	iv
1. Introduction	1
2. Objective of Joint Officer Development	3
3. Joint Competencies	3
4. The Continuum of Joint Learning	4
5. Relationship Between the Pillars of the Joint Learning Continuum	7
6. The Joint Qualified Officer	8
7. Service Responsibilities Regarding Joint Officer Development	9
8. Way Ahead	10

Chairman's Foreword

Overcoming the complex and evolving global security challenges facing the United States as this millennium unfolds will be the priority of the future joint force. The Capstone Concept for Joint Operations (CCJO), as the head of a family of joint operations concepts, describes how joint forces are expected to operate across the range of military operations in 2012-2025. One purpose of the CCJO is to lead force development; implicit in this purpose is that the leaders of the envisioned future force must also be developed.

The landmark 1986 Goldwater-Nichols Department of Defense Reorganization Act set the Department of Defense on the path that led to today's joint force and our extant approach to joint leader development. Now, almost 20 years later, as we move toward the force envisioned in the CCJO, transformative approaches to joint officer development are required to ensure that joint leaders with the proper mix of joint and Service leader competencies have the training, education, and experience to successfully lead the CCJO-envisioned force.

The 2005 Ronald Reagan National Defense Authorization Act charged the Secretary of Defense to develop a strategic plan for joint officer management and joint professional military education that links joint officer development to the overall missions and goals of the Department of Defense. This requirement has been the legislative impetus to develop the vision for joint officer development, attached herein.

This vision for joint officer development sets the objective and direction of march for transformative changes in how we will develop leaders of the CCJO-envisioned force. Detailed work on joint leader competencies is both at the heart of the vision and an area to be more fully developed; this task is now under way. This vision is intended to guide the development of strategies and approaches that will in turn produce the joint leaders required by the Nation.

PETER PACE
General, United States Marine Corps
Chairman
of the Joint Chiefs of Staff

1. **Introduction**

This white paper articulates the Chairman of the Joint Chiefs of Staff (CJCS) vision for transforming joint officer development (JOD), which will produce appropriately prepared senior leadership for the capabilities-based future joint force. The authority for this vision is CJCS statutory responsibility of "formulating policies for coordinating the military education and training of members of the Armed Forces."[1] This vision is intrinsically tied to the emerging Capstone Concept for Joint Operations (CCJO).

The CCJO's purpose is to drive future joint force development and employment; it does this by describing the family of future joint concepts that will guide the development of future joint capabilities. As an expression of where the joint force is going in the future, the CCJO is inherently linked to the overall strategy, missions, and goals of the Department of Defense, and thus, has been chosen as the baseline document underpinning future joint officer development. Therefore, the future joint force must explicitly inform the development of leaders of that force.

The CCJO " broadly describes how future joint forces are expected to operate across the range of military operations in 2012-2025 in support of strategic objectives. It applies to operations around the globe and envisions joint operations conducted in conjunction with coalition military partners and other governmental and nongovernmental agencies. It envisions military operations conducted within the context of a national strategy that also incorporates other elements of national power."[2]

This vision dictates that the current definition of "joint matters" must evolve. In the construct of this paper, "joint" therefore means the *integrated employment of US and multinational armed forces and interagency capabilities in land, sea, air, and space and in both the human and virtual domains.* With this definition in mind, the CCJO assumes that the "joint force will retain two of its main strengths:

1) A diverse set of capabilities inherent in the various Services and other organizations that comprise the force (as well as in external elements cooperating with the force); and
2) An exceptional ability to integrate those capabilities in pursuit of a common aim."[3]

These assumptions have profound implications for JOD as they implicitly stake out a key principle: *joint officers are built upon Service officers*: In other words, it excludes a born-joint approach to officer development. Following the CCJO's assumption that future joint operations will be planned and executed within a multi-Service, multi-agency, multi-national environment, future joint officers must possess the inherent ability to make the sum of the whole greater than the parts by possessing an *unprecedented ability to integrate diverse elements in a complex environment*.

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[1] 10 USC 153(a)(5)(C)
[2] CJCS, August 2005, *Capstone Concept for Joint Operations (CCJO)*
[3] *ibid,* pg. 4.

Any officer development approach must acknowledge that an officer's first responsibility is to understand war in all its complexities. This task involves not just the generation and accumulation of skills but the ability to understand second- and third-order thinking about human conflict. The CCJO reiterates this belief and directly addresses JOD by stating that the future joint force "requires knowledgeable, empowered, innovative, and decisive leaders, capable of leading the networked joint force to success in fluid and perhaps chaotic operating environments…(with) more comprehensive knowledge of interagency and multinational cultures and capabilities. [4]" These officers must be *strategically minded, critical thinkers, and skilled joint warfighters* in ways that allow them to lead a joint force that has the characteristics expressed in the CCJO. *This posits the requirement to identify and inculcate a set of joint leader competencies and skills based on the enduring values of the Joint Force.*

The CJCS vision for JOD establishes three broad descriptors[5] overarching the more discrete, uniquely joint-leader competencies.

- S*trategically Minded*. Those competencies that allow an officer to lead the CCJO-envisioned force within a multi-Service, multi-agency, multi-national environment and to be able to participate in and contribute to informed decision-making on the application of all instruments of national power - not just the military instrument.
- *Critical Thinker*. Those competencies associated with acuity of mind at the highest level - gained as a result of a continuum of learning across a lifetime.
- S*killed Joint Warfighter*. Those competencies and skills steeped in functional component core competencies and infused with an operational and strategic understanding of mission tasking across the range of military operations in the physical, virtual, and human domains.[6]

In the construct of this paper, competency refers to the higher level of assessing learning outcomes described by specific knowledge, skill, ability, and attitude (KSAA). The individual learner shall be assessed against the competencies and ability to demonstrate the desired behavior.

Greater treatment of these three broad descriptors will follow later, with subordinate attributes detailed. Equal to these desired competencies is the Chairman's belief that competency-based education, supported by assessment mechanisms to measure what the officer has learned - what the officer can do vice what he has read - is essential to successfully impart these desired joint competencies.

Within this context, the CJCS vision for JOD entails a competency-based lifelong continuum of learning where the outcome is a fully qualified and inherently joint officer suitable for joint command and staff responsibilities. In this approach, JOD transforms from its current linear, episodic, and fixed format to an approach that enables individual learning and multiple paths to achieve desired objective for JOD.

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[4] *Ibid*, pg 24.

[5] "Strategically minded," "critical thinker," and "skilled joint warfighter" are broad descriptors of joint leader competencies. A near-term independent study shall assist in developing a final set.

[6] Physical: air, sea, land, space; Virtual: cyber, information; Human: social, moral, cognitive. CCJO, pg 17.

2. **Objective of Joint Officer Development**

The objective of JOD is to produce the largest possible body of fully qualified and inherently joint officers suitable for joint command and staff responsibilities. The CJCS' vision for JOD sees fully qualified and inherently joint colonels and captains as the specific focal point of development. By focal point of development, we mean that career point at which joint and Service lines of development converge. Conversely, senior leader learning requirements diverge along those same lines to affect professional military education as early as the junior-company-grade officer level. By the time they reach the rank of colonel and captain, officers individual development is mature; their service in command or senior staff positions represents a harvest of accumulated training, education, experience, judgment and maturity. This JOD approach develops a pool of fully qualified and inherently joint leaders for promotion to flag rank.

The CJCS vision for JOD ensures that all colonels and captains are *skilled joint warfighters* who are also *strategically minded*, *critical thinkers*. Attaining the rank of colonel and captain will signify that an officer fundamentally thinks in a joint context at the operational and strategic levels of war and thereby possesses an unprecedented ability to integrate capabilities across the depth and width of the joint force.

3. **Joint Competencies**

In his Training Transformation (T2) Implementation Plan, the Secretary of Defense directed that "joint training and education will be recast as a component of lifelong learning and integrated across the Total Force ….to develop officers well versed in joint operational art."[7] Joint officer development within a competency-based context - that is, learning focused on the assessment of what has been learned vice simply read or remembered, is, as previously discussed, the mechanism to achieve the desired outcome. However, prior to accepting any set of competencies as uniquely joint, those leader competencies common to all Services should be distilled. It is the combination of leader competencies common to all Services plus the unique joint leader competencies that define the fully qualified and inherently joint colonel or captain. The concept of "fully joint qualified" in lieu of the "joint specialty officer" designation is discussed later in this paper. Service leader competencies will vary by Service but they are developed in a joint context and are the foundation for joint officer development.

In this view, Service leader competencies are subsumed as part of the JOD approach as the *joint requirement for leader competencies becomes integral to those of the Services.* The total body of joint leader competencies will generally be more broadly stated than Service leader competencies, as they will be more focused on strategic and operational aspects of leading a joint force in the achievement of DOD goals and missions. The collective body of leader competencies (i.e., uniquely joint + common + Service) inculcated in the officer corps through career-long development will properly produce and prepare the leaders of the CCJO-envisioned force. These fully qualified and inherently joint colonels and captains will have been equipped via the JOD process for joint command and staff responsibilities with the

[7] Department of Defense, 9 June 2004, "*Training Transformation Implementation Plan*"

"knowledge empowered, networked, interoperable, expeditionary, adaptable, enduring/persistent, precise, fast, resilient, agile, and lethal"[8] joint force. More specifically, colonels and captains as the output of the JOD process will have been equipped as:[9]

- **Strategically Minded:** A leader who is a cross-cultural communicator, able to foster trust internally and externally. Must be self-aware and at ease with decision making in the absence of complete information. Must recognize and adapt to agendas, and manage perceptions in multi-cultural environment. Must possess the ability to access and apply resources without ownership. Must be able to use communications skills to build teams at the strategic level through persuasive influence, collaboration, negotiation, and consensus building.

- **Critical Thinker:** A leader who can decisively and intelligently make decisions within the context of understanding and sensitivity to culture in ways that allow successful leadership of a world-wide deployable, multi-Service, and multi-national force. Has the ability to recognize patterns and changes and is comfortable with uncertainty and ambiguity. Versatile and creative, able to develop innovative solutions, thinking in time and context within the complex environment to bring about desired effects. Thinks in term of systems/linkages (effects) and is an expert learner.

- **Skilled Joint Warfighter:** A leader who is able to conduct campaigning and statecraft and understands the role of war and politics. An operational artist capable of integrating joint, interagency, and multi-national capabilities within physical, virtual, and human domains in time, space, and purpose. Possessing the functional core competency of fighting a joint force, while operating in a transparent, fluid, and networked environment.

4. **The Continuum of Joint Learning**

A distinctive attribute of the military profession is that military leaders are grown internally and not hired. Senior military leaders join the Service in entry-level positions, receive training and education, gain experience, pursue self-development and, over the breadth of their careers, become senior leaders of the force. Performance and potential are the alchemy of this growth, but nothing ensures that they are properly prepared leaders more than the institution's care given to the content of their training, education, experience, and self-development opportunities.

This white paper has already discussed the desired output of JOD and the broad descriptions of the attributes of uniquely joint leader competencies needed to lead the CCJO-envisioned force. These competencies go to the content of joint learning. What, then, of the mechanism needed to ensure that content actually produces the desired outcome? How will the CJCS

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[8] CJCS *Capstone Concept for Joint Operations (CCJO, August* 2005, pg 20.*)*

[9] "Strategically minded," "critical thinker," and "skilled joint warfighter" are broad descriptors of joint leader competencies. A near-term independent study shall assist in developing a final set.

vision for JOD produce the largest possible body of fully qualified and inherently joint colonels and captains?

The CJCS vision for JOD addresses these questions by establishing a Joint Learning Continuum of four interdependent supporting pillars. These pillars are:

- Joint Individual Training (JIT)
- Joint Professional Military Education (JPME)
- Joint Experience
- Self-development

The interdependent nature of the learning binned within the pillars creates an unprecedented ability to make the sum of the overall effect greater than the parts.

Inherent in the Joint Learning Continuum is the provision for multiple paths to JOD's desired objective, which is an approach that enables individual learning and discards the linear, episodic, and fixed format of the current approach. This approach explicitly seeks to expand and improve on the success of the landmark Goldwater-Nichols Act (G-NA) that first codified the relationship between JPME and joint experience in achieving jointness. Each of the four main pillars of the Joint Learning Continuum is described below.

Joint Individual Training. Training and education are related aspects of learning; simplistically put, training is learning to do, where education is learning to think. JIT entails the imparting of specific joint skills to individuals. Recognizing that more joint knowledge is needed earlier in an officer's career, integral in the JIT pillar is that these are important skills to acquire before an officer reaches the grades of major and lieutenant commander. Opportunities for delivery of JIT are multiple: embedded inside Service training venues, brick-and-mortar joint skill-specific training venues, or via distance education venues. The latter ties neatly to the SecDef dictum for lifelong learning and posits the requirement for a Joint Learning Portal (JLP), a virtual schoolhouse as a venue for obtaining joint unique skill sets, for fostering individual self-development, and to begin the process of joint acculturation.

A JLP is a logical outgrowth of the current Joint Knowledge Development and Distribution Capability (JKDDC) aspect of Training Transformation. JKDDC must grow to embrace the non-resident delivery JIT as well as JPME. Integral to this design will be transparent linkage to the Joint Staff's Joint Doctrine, Education, and Training Information System (JDEIS) and protocols that allow students to test out of various required training by demonstrating mastery of any subject area. Tracking and recording the accomplishment of JIT will be a Service responsibility with joint visibility of results. JLP will also serve as a forum for peer-to-peer joint learning and a repository for sharing joint lessons learned.

Joint Professional Military Education. JPME is at the heart of JOD, as schoolhouses are the petri dishes for organizational culture. JPME has been the key element of the transformation of the pre-G-NA force into its current state of jointness; this role carries on in the CJCS vision for JOD. JPME continues as a key educational activity for officers commencing at major and lieutenant commander. JPME curricula content will be revised so that it is based

on joint leader competencies previously described. Joint acculturation, now achieved through policy-mandated student and faculty mixes by military department, remains an integral aspect of JPME. The multiple levels of JPME described in law remain, as do resident and non-resident delivery approaches. Nominally, JPME I should be completed prior to promotion to lieutenant colonel and commander; JPME II should be completed prior to colonel and captain. To extend the benefits of JPME to the largest possible number of officers, delivery approaches that utilize hybrid techniques (a mixture of resident and non-resident delivery) will be implemented for JPME II. Joint General and Flag Officer education opportunities remain a key component of JPME.

Self-Development. Officers through their oath of office and by definition bear special trust and confidence; the responsibilities and authorities of a commission follow from this status. Consequently, the self-development pillar of the JOD vision recognizes that empowering individuals with responsibility to actively participate in their growth is a necessary and positive step. This pillar of the joint learning continuum posits officers' self-directed, self-motivated quest to prepare them for greater duties, responsibilities, and authorities. This said, the engine of success in self-development is commanding officer involvement, specifically in the commander's creation of an environment where self-development is both prized *and* expected.

Self-study in the pursuit of knowledge accelerates an officer's development as well as allows flexibility and accommodation to individual circumstances of need, situation, and desire. Every military leader, particularly those whose job it is to practice war, must be given every opportunity to study war. Learning as a life-long process should be supported by unfettered and continuous access to the best and most inclusive program of war studies. Contemporary distance learning technology permits military students to learn in groups and virtual seminars even when on the job or in some distant theater of war. Every officer who takes advantage of the opportunity to learn must receive recognition and professional reward for the quality of that learning.[10] Establishing testing and assessment protocols that credit officers for their individual developmental accomplishments rewards self-development; one should be able to test out of aspects of JIT or JPME when demonstrating mastery of aspects of formal curriculum. Easy access to non-resident delivery of both JIT and JPME is an essential aspect in granting full credit to joint competencies gained through rigorous self-development. The previously mentioned JLP will serve as the primary forum for self-development.

Joint Experience. Joint experience is a key learning opportunity, as it is where the other aspects of the JOD approach move from the conceptual to the actual. The intellectual understanding of war that is gained through operational experience rounds out the continuum of joint learning. The joint experience pillar implicitly recognizes that the successful application of what individuals learn via JIT, JPME, and self-development is essential.

Joint warfighting is not an academic pursuit; its competencies must be demonstrated by practice. Simply put, *joint experience accrues where jointness is applied.* The joint experience pillar of the Joint Learning Continuum captures this aspect; however, inherent in

[10] Derived from the statement of Major General Robert Scales, USA (ret), testifying before the House Armed Service Committee, 15 July 2004.

this approach are required changes from the current Joint Duty Assignment List (JDAL) methodology for capturing joint experience, to include understanding that there may be degrees of jointness in diverse billets.[11]

The JDAL was initially an appropriate mechanism for managing credit for joint experience but as jointness has taken hold in the almost two decades since G-NA's enactment, the JDAL has proven a process-intensive and mechanical approach. In the current paradigm, some billets produce joint credit merely because they are in joint organizations; others receive no credit because they are located in Service organizations. In neither instance does the current approach account individually for the nature of the specific duties performed, the intensity, nor is individual performance in those billets a factor.

Inherent in the CJCS vision for JOD is transforming the JDAL into a meaningful management tool. The JDAL should be relied on to manage the generalist versus "specialist" billet inventory. Accordingly, joint credit should be managed through a paradigm of tailored assessment that accounts for both the billet duties and the officer's performance in that billet. The mere location or grade of the billet is diminished as a factor. What is more important is *what an officer does and how the officer performs.* In this new approach, any billet is eligible to generate joint credit on the verification that the billet's responsibilities meet certain basic prerequisites, the spirit of which is a litmus test of how joint are the responsibilities of the billet. Relatedly, having joint responsibilities does not mean that the officer's performance of those responsibilities is truly joint; the individual's movement toward the desired JOD objective, by demonstrated growth in joint competencies, requires individual validation. Implicit in this last point is that some officers may gain this validation sooner than others; some may never demonstrate it.

The CJCS vision for JOD assigns the Joint Staff the responsibility to develop the litmus test for joint billets. It assigns to the appropriate commander the responsibility to validate the billet and the officer's related performance. Services are given the responsibility to track, monitor, and record the gaining of joint experience. Just as important, individual officers must be able to assess their own personal progress in attaining a joint-qualified status within the context of a Service career path.

5. **Relationship Between the Pillars of the Joint Learning Continuum**

The linear progression of time suggests that most officers will experience the pillars of the Joint Learning Continuum in a linear fashion, progressing from JIT, through JPME (I and II) with joint experience gained enroute serving to validate the knowledge gained previously. Officers will likewise seek to simultaneously develop as Service officers and seek assignments and Service development opportunities accordingly. This is appropriate as the pillars of the Joint Learning Continuum are designed to allow multiple paths to achieving the desired JOD objective. Officers can, through self-development and non-resident education and training, arm themselves with the required learning regarding the joint competencies. Demonstration of these competencies in any billet meeting a joint litmus test allows joint

[11] Booz-Allen-Hamilton's 2003 study on Joint Officer Management and JPME identified these as "Critical" (Integral); "Required;" and "Associated."

credit to be gained in ways and assignments not now available. Officers and Services will find it easier to reconcile service and joint assignment options, consequently more assignments that deepen an individual officer's personal occupational competency will be easier to link to achieving the common objective of JOD. Further, an important implication of the envisioned changes in the accounting of joint experience will be that Joint Officer Management (JOM) becomes more flexible and responsive, as there are multiple paths to achieving the JOD objective, with much of the requirement for quality control and recording waypoints being placed on commanders, individual Service and joint command headquarters.

6. **The Joint Qualified Officer**

A largely effective forcing function of the current approach to joint officer development has been the requirement that all G/FOs be Joint Specialty Officer (JSO) designated.[12] All G/FOs have met the minimum JPME and joint billet (experience) prerequisites for nomination to hold the joint specialty. While this approach has assured all G/FOs have minimum joint credentials, it is also manpower management intensive and has created limitations regarding qualified assignments and education opportunities. Processes to work-around joint billet chokepoints in career paths have included assignments of minimum tour lengths (i.e., 22 month assignments for some) and a pattern of prerequisite waivers. Importantly, the chokepoints have constrained opportunities to officers who could not get the proper schools or billets. It is time to define broader standards for what constitutes a fully qualified joint officer.[13]

The CJCS vision for JOD sees fully qualified and inherently joint colonels and captains as its specific focal point. This approach further ensures a larger pool of fully qualified and inherently joint leaders for promotion to flag rank. The current designation of JSO is incomplete; the JOD approach is fundamentally not building *specialists*, but inculcating jointness in *all* colonels and captains - a generalist approach. As a result, the Chairman's vision for JOD mandates replacing the extant JSO designation with the more accurate joint qualified officer (JQO) designation.

The measure of being fully qualified is to be a JQO. JQO's component pieces are JIT, JPME I and II, and joint experience, all gained through the multiple paths previously described. Promotion to general and flag rank will require an officer to be a JQO as an eligibility prerequisite, identical to the way JSO serves in the current construct.

The multiple paths to the JQO designation, as well as Service responsibilities to track, monitor, and record the gaining of joint experience, provide relief to the current manpower management intensive systems and relieve and reduce work-arounds regarding assignments, tour lengths, etc. Check-the-box paradigms for demonstrating jointness should also largely evaporate as the multiple paths to JQO provide increased flexibility in Service management of career paths.

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[12] 10 USC (661)

[13] Center for Strategic and International Studies, *Beyond Goldwater-Nichols; U.S. Government and Defense Reform for a new Strategic Era- Phase 2 Report, DRAFT/*TBD, Page 87

7. **Service Responsibilities Regarding Joint Officer Development**

Earlier in this white paper, the key joint principal, *joint officers are built on Service officers* was articulated, with the implication that a born-joint approach to officer development was excluded. Like the Chairman, Service Chiefs have title 10 USC responsibilities for officer development. Services recruit, commission, educate, and train junior officers in various occupational specialties, and assign, promote, and manage their development from junior to senior officers. Officers are always members of their parent Services, subject to its regulations and cultural nuances - even in a joint assignment. Young Americans seek commissions in Services and not the joint force; the CCJO explicitly recognizes the value of Service diversity as a main strength. How then does the Joint Learning Continuum with its life-long application reconcile with "*joint officers are built on Service officers*?"

Extant Joint Doctrine (and the CCJO) clearly recognizes that the integration of Service core warfighting competencies is at the heart of jointness; this paradigm demands that Service officer development be done in a joint context. The desired objective of JOD explicitly requires colonels and captains steeped in Service core warfighting competencies developed, from commissioning, in a joint context. The CJCS vision for JOD does more than integrate Service officer development approaches; it drives them to produce the leaders the CCJO force requires. Services may need to adjust their officer development models to fit the new JOD paradigm.

The Joint Learning Continuum is the architecture of this directing approach that sets out the parameters of this joint context, as well as establishing the pathways to achieve the JOD objective. The CJCS vision for JOD establishes the requirement that all paths - Service and joint - work together to produce the JOD objective of colonels and captains with the desired values-based joint competencies.

The greatest Service responsibility in JOD is that of accountability. In a broad sense, it is a Service responsibility to develop officers with the desired joint leader competencies. The Services must foster this development; they therefore must be institutions whose individuals pursue learning and intellectual development with intensity and are rewarded for doing so. In practical terms this entails the Services rewarding (through selection for increased responsibilities, rank, and authorities) those officers who demonstrate the desired joint leader competencies (and the potential for them earlier in their careers.) The Services must further hold individual officers accountable by rewarding excellence and their active pursuit of the joint leader competencies, they must know where officers are in their development; and must mentor all officers toward the JOD objective. The Services must develop a no-officer-left-behind attitude.

The Services maintain the responsibility to set and develop competencies to meet their own Service-specific roles, missions, and capabilities; e.g., by fostering tactical employment skills, and building foreign language skills and platform-specific proficiency skills, etc. As a general rule, however, Service-specific learning at all levels will be analogous to the joint-learning continuum.

8. **Way Ahead**

Under CJCS statutory authorities, the Joint Staff will be responsible for fully developing the CJCS vision for JOD, under the direct supervision of the Director, Joint Staff. The transformational JOD approach will be achieved largely through a cooperative partnership between the Operational Plans and Joint Force Development Directorate (J-7), and the Manpower and Personnel Directorate (J-1). Changes to pertinent policies and instructions, as well as joint doctrine, will likely emerge across the Doctrine, Organization, Training, Materiel, Leadership/Education, Personnel and Facilities (DOTMLPF) spectrum; these changes will be pursued as necessary to implement the new JOD approach. Additionally, achieving the CJCS vision for JOD requires identification of *internal issues* (those with solutions solely within the purview and prerogative of the Department of Defense) and *external issues* (those with solutions affected by other USG agencies including the legislative branch of government, the private sector, international and multinational coordination, etc). Changes to title 10 USC will be required, specifically to the definition to joint matters and in sections dealing with joint officer management and JPME.

In the near term, research into uniquely joint and common leader competencies will be completed within the next 6 months and form the basis for a substantive revision of the CJCS Officer PME Policy.[14] The CJCS vision for JOD is also designed to provide CJCS advice to the Secretary of Defense regarding the NDAA 2005 congressional requirement to provide a strategic plan for joint officer management and JPME due to Congress not later than January 15, 2006.[15]

[14] CJCSI 1800.01B, 30 August 2004,*Officer Professional Military Education Policy (OPMEP)*
[15] FY 05 National Defense Authorization Act (NDAA).

APPENDIX - C

Definitions

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Definitions

Ability – the physical or mental power to do something; **Synonyms** capability, capacity, competence, competency, faculty.

Capability – the ability to achieve a desired effect under specific standards and conditions through a combination of ways to perform a set of tasks.

Characteristic – (1) having or showing the qualities associated with the members of a particular group or kind, **Synonyms** distinct, distinctive, distinguishing, identifying; (2) something that sets apart an individual from others of the same kind, **Synonyms** attribute, character, feature, quality, trait.

Competency – the higher level of learning outcomes described by specific knowledge, skill, ability and attitude (KSAA) which affect performance.

Joint Duty Assignment – a position which has documented requirements for or contributes to the development of joint characteristics.

Joint Matters – matters relating to the integrated employment of land, sea, and air forces, including matters relating to national military strategy; strategic planning and contingency planning; and command and control of combat operations under unified command. *PROPOSED*: Matters involving the integrated use of military forces relative to national military strategy; strategic and contingency planning; and command and control of operations under unified command, which may be conducted with multi-service and/or multinational, interagency and non-governmental partners under unified action across domains such as land, sea, air, space and the information environment.

Joint Officer Management – the cradle-to-grave method of managing officers through the continuum of joint experiences, including developmental and joint assignments. Also provides the mechanism for tracking joint experiences and qualifications.

Joint Officer Development - a process to produce the largest possible body of fully qualified and inherently joint officers for joint and staff responsibilities by cultivating

an officer's service competencies and transforming them into joint capabilities through Joint Professional Military Education, training, experiences and self-development.

Joint Qualification – (1) a level of proficiency ascribed by the Secretary of Defense with the advice and counsel of the Chairman of the Joint Chiefs of Staff; (2) one in a series of hierarchical standards attained by an individual with joint experiences, education, training, and/or acculturation.

Joint Qualified Officer – replaces legacy term "Joint Specialty Officer (JSO)" by taking into consideration the level, or amount, of joint experience/competencies attained by an officer through assignments, education, training, exercises and self-development. Currency, frequency, and intensity are also factors in assessing qualification levels.

Skill – (1) the ability to use one's knowledge effectively and readily in execution or performance; (2) a learned power of doing something competently: a developed aptitude or ability.

Unified Action – a broad generic term that describes the wide scope of actions (including the synchronization of activities of multinational forces, governmental and nongovernmental agencies) taking place within unified commands, subordinate unified commands or joint task forces under the overall direction of the commanders of those commands.