Logistics Management Institute

Joint Professional Military Education for Reserve Component Officers

A Review of the Need for JPME for RC Officers Assigned to Joint Organizations

RA501R1

November 1998

DISTRIBUTION STATEMENT A
Approved for public release;
Distribution Unlimited

Dayton S. Pickett
David A. Smith
Elizabeth B. Dial

19981214 084

LMI

DTIC QUALITY INSPECTED 3

Joint Professional Military Education for Reserve Component Officers

A Review of the Need for JPME for RC Officers Assigned to Joint Organizations

RA501R1

November 1998

Dayton S. Pickett
David A. Smith
Elizabeth B. Dial

Prepared pursuant to Department of Defense Contract DASW01-95-C-0019. The views expressed here are those of the Logistics Management Institute at the time of issue but not necessarily those of the Department of Defense. Permission to quote or reproduce any part except for government purposes must be obtained from the Logistics Management Institute.

LOGISTICS MANAGEMENT INSTITUTE
2000 CORPORATE RIDGE
MCLEAN, VIRGINIA 22102-7805

Executive Summary

This report investigates the need for joint professional military education (JPME) for the approximately 4,400 Reserve Component (RC) officers assigned to mobilization billets—or serving on active duty—in joint organizations.[1] Specifically, it identifies the type and amount of JPME needed by most of these officers if they are to be prepared properly to perform their duties.

LMI began with a comprehensive inventory of all present opportunities for RC officers to receive JPME. We identified the RC officer position authorizations in all joint organizations and then surveyed the organizational supervisors of those positions. Those officials described the jobs' responsibilities, using the language of the learning objectives associated with the JPME now being taught in DoD's intermediate (command and staff school) and senior (war college) military educational institutions.

In conducting our survey and analytical work, we became aware of a pervasive and serious problem in position—or billet—management among the RCs and in DoD's joint organizations. This problem hampered our work, and it presents far more serious challenges to RC and joint personnel managers as they attempt to cooperate in future assignment and educational ventures.

Since the need for RC JPME far exceeds the present opportunity for RC officers to receive it, we sought to determine the optimum structure and content of the JPME that should be delivered to RC officers in view of the continuing constraints on their available time. But because the language of 10 U.S.C. 666 directs that this education be as similar as practicable to that given to officers of the active forces, a substantial educational effort is called for, as well as an appreciable time investment by the RC officers who would serve in joint organizations.

Two workshops were held to identify the educational programs needed and to develop realistic delivery strategies for providing them. The outcomes of the

[1] Our analysis is confined to officers in grades O-4 through O-6, for reasons explained in the text.

workshops, when blended with LMI's analytical work regarding the need for JPME, result in three recommendations:

- *The Office of the Secretary of Defense (OSD) should act to improve the accuracy and responsiveness of the information interface between the several RCs and all DoD joint organizations so that the related preparation and assignment of RC officers can be managed more effectively.*

- *OSD and the Joint Staff should promptly establish an advanced JPME program for RC officers who are to serve in selected positions in joint organizations.*

- *OSD and the Joint Staff should establish a basic JPME program for officers of the Naval Reserve, Marine Corps Reserve, and Coast Guard Reserve and be prepared to do so for the RCs of the Army and the Air Force as well.*

Contents

Chapter 1 Introduction 1-1

PROFESSIONAL MILITARY EDUCATION FOR OFFICERS OF THE RESERVE FORCES 1-1

JOINT PROFESSIONAL MILITARY EDUCATION (JPME) 1-3

General 1-3

JPME for RC Officers 1-3

REMAINING QUESTIONS 1-5

ORGANIZATION OF THIS REPORT 1-6

Chapter 2 The LMI Study 2-1

OBJECTIVE 2-1

DESIGN AND CONDUCT OF THE STUDY 2-1

Joint Organizations and RC Officer Billets 2-1

Duties and Responsibilities of RC Officers in Joint Organizations 2-2

Southern Command Example 2-5

DEVELOPMENTS DURING THE STUDY 2-6

First Workshop on JPME for RC Officers 2-7

Steering Committee 2-7

Senior-Level Reserve Component Working Group and Second Workshop 2-8

POSITION MANAGEMENT 2-8

Chapter 3 Basic JPME for RC Officers 3-1

INTRODUCTION 3-1

PME COURSES FOR RC OFFICERS 3-1

Army Command and General Staff College 3-2

College of Naval Command and Staff 3-3

Air Command and Staff College 3-3

Marine Corps Command and Staff College 3-3

RC OFFICER REQUIREMENTS FOR BASIC JPME 3-4

IMPACT OF CULTURE ON PME ATTENDANCE 3-6
Army 3-6
Navy 3-6
Air Force 3-6
Marine Corps 3-7
National Guard 3-7
SUPPLY OF GRADUATES 3-7
Supply versus Inventory 3-7
RC Officer Supply versus Basic JPME Requirements 3-8
IMPACT OF PERSONNEL MANAGEMENT POLICIES 3-9
PME Selection Process 3-9
Position Selection and Rotation Policies 3-9
OBSERVATIONS 3-10

Chapter 4 Advanced JPME for RC Officers 4-1
INTRODUCTION 4-1
OPPORTUNITIES FOR RC OFFICERS TO ACQUIRE ADVANCED JPME 4-1
REQUIREMENTS FOR RC ADVANCED JPME 4-2
THE ADVANCED JPME INITIATIVE 4-5
Approaching the Problem 4-5
A "Bookend" Educational Program 4-5
The Curriculum 4-6
Selection of Student Officers 4-8
ANNUAL GRADUATION RATES 4-8

Chapter 5 Conclusions and Recommendations 5-1
CONCLUSIONS 5-1
Conclusion 1: Personnel Management 5-1
Conclusion 2: RC Officers and Joint Work 5-1
Conclusion 3: The Present System and JPME Completion Among RC Officers 5-2
Conclusion 4: Dynamic Conditions 5-2

RECOMMENDATIONS 5-2
Recommendation 1: Personnel Management 5-2
Recommendation 2: Advanced JPME 5-3
Recommendation 3: Basic, or Phase I, JPME 5-3

Appendix A Data Tables

Appendix B Principles of Joint and Combined Planning and Warfare Required for Basic JPME for Reserve Component Officers

Appendix C Principles of Joint and Combined Planning and Warfare Required for Advanced JPME for Reserve Component Officers

Appendix D Duties and Responsibilities Associated with the RC Officer Position upon Mobilization

Appendix E Report of the May 1997 Workshop

Appendix F Report to the Steering Committee September 1997

Appendix G Abbreviations

FIGURES

Figure 4-1. Proposed "Bookend" Model 4-5

TABLES

Table 2-1. Joint Organizations and RC Officer Billets Authorized 2-2
Table 2-2. Table Survey Responses and Percentages, by Joint Organization 2-4
Table 2-3. SOUTHCOM Example of RC JPME Analysis Results 2-6
Table 3-1. RC Basic JPME Requirements, by Joint Organization 3-4
Table 3-2. Distribution of RC Positions in Joint Organizations by Grade, Service, and RC 3-5
Table 3-3. Officers in Grade O-4 Who Had Completed Intermediate-Level PME as of 31 March 1997 3-7

Table 3-4. Officers in Grade O-5 Who Had Completed Intermediate-Level PME as of 31 March 1997 3-8

Table 4-1. RC Advanced JPME Requirements, by Joint Organization 4-3

Table 4-2. Distribution of Positions in Joint Organizations by Grade, Service, and RC 4-4

Table 4-3. Student Loads for Advanced JPME by Time and Phase 4-9

Chapter 1
Introduction

PROFESSIONAL MILITARY EDUCATION FOR OFFICERS OF THE RESERVE FORCES

In the United States, the professional military education (PME) for Reserve Component (RC) officers has varied over time, varied with the resources available to support it, and varied among the RCs as well.[1] In all cases, however, the educational models used for whatever kind of RC PME being offered at the moment have been the PME Programs conducted for the officers of the respective active forces.

This has been a reasonable path to follow. The educational preparation of our military officers for war is a task to be accomplished first for those who will need it first. It follows that the nature and composition of that education becomes the reasonable standard for that offered to officers who are to reinforce or expand America's military leadership in time of emergency. Education of the latter group should then be seen as having a lower priority. In addition, of course, RC officers have much less time in their peacetime lives for military education than do their counterparts in the active forces.

The part-time nature of RC military jobs has led to educational experiences that are also largely part-time. Within all the Military Services, the resident programs of the intermediate (command and staff) and senior (war college) PME schools are designed for and attended primarily by active force officers. While some RC officers do complete these programs, the vast majority of RC officers experience their PME on a nonresident basis, either through seminars or traditional correspondence courses.

In addition, about half of the professional military schools offer shortened or compressed segments of their programs designed primarily for RC officer participation. A good example of this kind of program is that of the Naval War College (NavWar), where three times each year USNR officers may attend a two-week course offered by the College. Each short course contains a representative offering of one of the institution's three academic departments, so that three consecutive courses combine to produce a six-week sample of the entire resident program

[1] This report deals with seven Reserve Components: The U.S. Army National Guard (ARNG), the U.S. Army Reserve (USAR), the U.S. Naval Reserve (USNR), the U.S. Marine Corps Reserve (USMCR), the U.S. Air National Guard (ANG), the U.S Air Force Reserve (USAFR), and the U.S. Coast Guard Reserve (USCGR).

(which requires an academic year to complete under normal circumstances). These courses are taught at the intermediate level, that represented by the College of Naval Command and Staff.

For more than 20 years, the Army's Command and General Staff College (CGSC) at Fort Leavenworth, Kansas has offered the longest of the RC-oriented short courses. This 19-week resident course represents a major segment of the institution's standard 42-week resident program. Completion of the 19-week course qualifies participating RC officers with full credit for the College's principal course.[2]

The outcome of all these kinds of activities is a pattern of education that resembles in content that of the standard, active-force-oriented programs, but at reduced levels of intensity and breadth. The Services' curriculum designers at the intermediate and senior PME schools have routinely used their resident curricula as foundations upon which to build nonresident or shortened resident programs. The results resemble the standard nine- or ten-month resident efforts as much as possible, while the courses are configured in ways that accommodate interrupted or intermittent effort on the part of the students. The accommodating reconfiguration sometimes comes at the expense of important course content.

Just as the PME cultures among the Military Services differ, their RC PME cultures vary as well, and in similar ways. In this case "culture" includes the traditions, attitudes, and practices that characterize the Military Service and, in many ways, the accompanying RC(s). Thus, for instance, the PME philosophy and approach in the ANG and USAFR resemble (but are not identical to) the PME approach used for officers of the active Air Force.

Of all the Services, the Army believes most in extensive PME for its officers. It is said that an Army officer of the active forces, throughout a normal career, can expect to spend about one year out of every four in some kind of PME. In this Service, PME completion requirements for promotion consideration are commonplace. In contrast, the Navy has traditionally considered attendance at officer PME largely a matter of availability. The principal path to success for naval officers has been to remain in the fleet throughout as much of one's career as possible. The PME culture of the Air Force approaches that of the Army in vigor and pervasiveness, and, as may be imagined, the PME culture of the Marine Corps resembles that of the Navy more than it does those of the other two major Services. The Coast Guard, with no PME schools of its own, has welcomed the PME opportunities offered by the other Services.[3] The active Coast Guard (and the USCGR as well) treats PME completion as a career-enhancing experience but not a necessity

[2] These RC-oriented short courses are normally available to officers of the other Services. The CGSC short course is not open to officers of the active Army.

[3] Those opportunities, interestingly enough, have come largely from the Navy and the Army. It is unusual for a Coast Guard officer to attend Air University courses at either the intermediate or senior level.

for its officers. Between 10 and 15 percent of all USCG and USCGR officers complete intermediate or senior PME programs, compared with much higher percentages in the other Services.[4]

JOINT PROFESSIONAL MILITARY EDUCATION (JPME)

General

The professional military schools have included some form of JPME in their curricula since World War II. In 1986, however, the Department of Defense Reorganization Act—also known as the Goldwater-Nichols Act (GNA)—brought about a marked intensification of joint education in all professional military instructional programs. In addition, the new law directed that responsibility for developing policy for the coordination of all PME be vested in the Chairman of the Joint Chiefs of Staff (CJCS).[5] Accordingly, the Joint Staff added, under the authority of the J-7 (Director for Operational Plans and Interoperability), a new Military Education Division. This organization, which has staff responsibility for all of JPME, has published two successive guides to ensure that high-quality education is received from the JPME system. The primary focus of the current guide[6] is intermediate- and senior-level PME. The Military Education Division also supervises and coordinates the Process for the Accreditation of Joint Education (PAJE). An ongoing effort modeled after the accreditation process used by civilian colleges and universities, PAJE is used to ensure the continuing quality of the Program for Joint Education (PJE).[7]

JPME for RC Officers

That portion of GNA establishing the education requirements for officers of the active forces specializing in joint matters[8] does not directly address the same issue for RC officers. Rather, the statute directs the Secretary of Defense to establish the necessary policies:

> *666. Reserve officers not on the active-duty list*
>
> The Secretary of Defense shall establish personnel policies emphasizing education and experience in joint matters for reserve officers not

[4] See Chapters 3 and 4 for a more detailed discussion of comparative completion rates.

[5] In practice, the CJCS has chosen to provide only general guidance for PME but to exercise aggressive oversight over the joint portions of the PME curricula.

[6] CJCS Instruction 1800.01, *Officer Professional Military Education Policy,* 1 March 1996.

[7] PJE is related to but different from JPME. PJE consists of both segments of the preparation required for an officer to be designated a Joint Specialty Officer (JSO): the required JPME, and successful completion of an official joint duty assignment. JPME refers only to the educational component of that preparation. GNA further stipulates that the JPME be divided into two phases and be taught by the institutions in the arrangement discussed in this chapter.

[8] 10 U.S. Code, Chapter 38.

on the active-duty list. Such policies shall, to the extent practicable for the reserve components, be similar to the policies provided by this [section].[9]

A delivery system for the education required by GNA for officers who are to specialize in joint matters has been established throughout DoD.[10] The Service intermediate and senior schools offer Phase I JPME embedded in both their resident and nonresident curricula, and the National Defense University (NDU) offers Phase II JPME in three of its colleges.[11] The NatWar and ICAF academic programs require an academic year to complete, while the AFSC course lasts 12 weeks. NatWar and ICAF together admit fewer than 10 RC officers annually, and AFSC has had only one or two RC students in its Phase II course since its inception.[12] As a result, very few RC officers have completed Phase II JPME, and the outlook is bleak for many to complete this course of instruction in the future.

Appreciable numbers of officers in the four Army and Air Force RCs are able to complete Phase I JPME routinely (see Chapter 3). USNR members, on the other hand, have attended their own—and other Services'—intermediate institutions only sparingly.[13] While the number of USMCR Phase 1 graduates has historically been low, the present rate of attendance is growing markedly. USCGR Phase I graduation rates remain at between 10 and 15 percent of the officer corps.

---

[9] 10 U.S.C. 666.

[10] Now called JSOs (and limited by law to officers of the active forces).

[11] The National War College (NatWar), the Industrial College of the Armed Forces (ICAF), and the Armed Forces Staff College (AFSC). NatWar and ICAF both have Phases I and II JPME embedded within their respective curricula, while AFSC is the nation's Phase II specialist, teaching Phase II JPME to about 1,000 students each year in four successive classes in the institution's flagship course. It should be emphasized that JPME is a subset of PME. Phases I and II JPME were identified separately both for pedagogical and operational reasons. The teaching of joint matters as part of a larger PME curriculum is a logical and natural way to meet the educational requirements of GNA. Therefore, the high-intensity Phase II program at AFSC amounts to an instructional exception, brought about primarily by the statutory mandate to maintain JSO manning of joint organizations at specified levels.

[12] This absence of RC officers from the Phase II JPME course is due primarily to three reasons: Phase II, required only for the preparation of JSOs, has been considered inappropriate for RC officers; class admission quotas are distributed by AFSC to the Military Services, which have not selected RC officers to attend; and the present AFSC throughput of about 1,000 officers per year, which strains the institution's capacity, barely keeps up with the continuing demand for Phase II graduates (imposed by GNA) in joint organizations.

[13] The principal reason for this condition is the historic PME culture within the Navy. There is no tangible reward for the USNR officer for successful PME course completion. His/her counterpart in the active Navy has traditionally shunned PME attendance. Within the past several years the policy of the Navy has begun to change, however. Present Navy policy suggests that naval officers should attend either a Service intermediate school or senior school, but not both.

REMAINING QUESTIONS

But is the present JPME activity by RC officers enough to prepare them adequately for effective duty in joint organizations? For the first several years following the enactment of GNA, the role of RC officers in "jointdom" was considered inconsequential, and the above question had little relevance. Within the past few years, however, 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.[14] Over 90 percent of these RC officers are Individual Mobilization Augmentees (IMAs), all of whom are part-time members of their respective joint organizations.[15] The small remainder consists of Active Guard/Reserve (AGR) officers serving full-time tours of duty.

Officers of the reserve forces now play more important roles in our joint organizations than ever before. While for some time they were viewed only as manpower assets training during peacetime for a future emergency, that perspective has now changed. Today, even the IMA assigned to a joint organization may, depending on his/her availability, be asked to deploy (typically) for a peacekeeping or police action mission of definite duration as a unit member. At any given moment, there are now up to several hundred RC officers from our joint organizations on mission status, many outside the United States. While heretofore it was not necessary, and perhaps not even advisable, for these RC officers to be educated in joint matters, there is now a widespread belief that at least some JPME is needed for IMA and AGR officers in these units. In 1995, LMI was asked to determine just what the need—if any—was. This report covers the actions and outcomes of the ensuing study.

---

[14] For the purpose of this study, LMI has considered as "joint organizations" those having positions included on the official Joint Duty Assignment List maintained by the J-1, Joint Staff. Those organizations generally include the Joint Staff itself, the Combatant Commands (consisting of the Unified Commands plus the North Atlantic Treaty Organization and the North American Aerospace Defense Command), the Office of the Secretary of Defense, and a number (but not all) of the Defense Agencies.

[15] Within the past few years, several practices have developed to improve the day-to-day management of RC officers performing duty in joint organizations. These practices range from the establishment and operation of somewhat informal "detachments" that perform administrative support for their RC "members" to much larger, satellite-type joint organizations that sweep all RC members of a particular joint command together in order to provide effective support to both the RC members and the command itself. Members of these latter reserve organizations are no longer considered IMAs, although they perform IMA-type duties in the combatant command or similar joint organization supported. Looming over all these ongoing changes, however, are several relatively new 10 U.S.C. portions (Sections 10171 through 10174) that require the members of all RCs to be assigned under the control of the respective chiefs of the RCs. Throughout this LMI report, all such "IMA-like" RC officers who work in joint organizations are called IMAs, whatever their official or administrative designation.

ORGANIZATION OF THIS REPORT

This report has five chapters and six appendices. The next chapter describes the objective, design, conduct, and outcomes of the LMI study. Chapter 3 addresses in some detail the issues surrounding basic or Phase I JPME for RC officers. Chapter 4 accomplishes the same task for advanced JPME for RC officers. The final chapter sets forth our findings and recommendations.

Throughout the report, we have included tables showing global or representative data. Detailed supporting data are located in tables in Appendix A. Appendices B through D contain the questions used in our survey of RC position supervisors in joint organizations. Appendix E is the report of the May 1997 workshop for military educators held at LMI to address the educational issues of JPME for RC officers. Finally, Appendix F is the report to its Steering Committee of the September 1997 workshop held by the senior-level working group representing all constituencies with potential for involvement in any JPME for RC officers.

Chapter 2
The LMI Study

OBJECTIVE

The objective of the study described in this report was to assess the need for RC officers working in joint organizations to receive JPME "to the extent practicable," as required by Section 666 of GNA. If we found that there are RC officers requiring JPME in order to perform satisfactorily in their assignments, it would then be necessary to determine the level and extent of that education.

DESIGN AND CONDUCT OF THE STUDY

The study faced three major challenges. The first was to determine the specific assignments of RC officers in joint organizations. The second was to determine whether their duties and responsibilities would require JPME of some kind to equip the incumbents to perform their duties satisfactorily, both during peacetime and under emergency conditions. If the need for JPME was identified, then the third challenge of the study was to determine its nature and amount.

Joint Organizations and RC Officer Billets

We first determined the authorizations in joint organizations for RC officer billets, grades O-4 through O-6.[1] This effort resulted in the identification of 4,385 positions.[2] Table 2-1 lists the joint organizations found to be authorized RC officer billets and the corresponding number of billets in each organization's manning documents.

[1] We chose to focus our review on JPME at the Phase I and Phase II levels. Officers below grade O-4 or above O-6 typically would not be appropriate candidates for those levels of JPME. Also, the number of billets at those grades is inconsequential.

[2] This identification proved to be difficult. We decided to use the information maintained in each joint organization's manning document as most appropriate. This issue is treated in detail in a separate section later in the chapter.

Table 2-1. Joint Organizations and RC Officer Billets Authorized

Joint organizations	RC officer billets[a]
Combatant commands	
Atlantic Command	639
Central Command	217
European Command	258
Pacific Command	603
Southern Command	199
Space Command[b]	181
Special Operations Command	172
Strategic Command	96
Transportation Command	90
NATO	11
Subtotal	2,466
Office of the Joint Chiefs of Staff	
Joint Staff	73
National Defense University	14
Subtotal	87
Office of the Secretary of Defense[c]	153
Defense agencies and activities	
Small agencies and other activities[d]	96
Defense Intelligence Agency	838
Defense Logistics Agency	745
Subtotal	1,679
TOTAL	4,385

Source: Joint organizations' manpower authorization documents as of mid-1996. See Appendix A for detailed data on billets in joint organizations by RC and grade.

[a] Grades O-4 through O-6.

[b] Includes North American Aerospace Defense Command (NORAD).

[c] Includes Reserve Forces Policy Board (RFPB) and National Committee for Employer Support of the Guard and Reserve (NCESGR).

[d] Includes Defense Finance and Accounting Service (DFAS), Defense Information Systems Agency (DISA), Prisoner of War/Missing in Action (POW/MIA) Office, Armed Forces Information Service (AFIS), Ballistic Missile Defense Organization (BMDO), Defense Legal Services Agency (DLSA), and DoD Inspector General (DODIG).

Duties and Responsibilities of RC Officers in Joint Organizations

Determining of the duties and responsibilities of approximately 4,400 officers, both during peacetime training and duty and in time of emergency, was the next

essential step of the study. We surveyed all joint organizations to obtain that information.

The survey respondents were the supervisors of the RC officer billets, chosen because we believed that they would know most about each position. In addition, since the vast majority of these RC officer positions are to be filled by IMAs, it would have been very difficult to survey RC officer incumbents. Finally, we believed that Active Component or civilian supervisors would provide a more accurate and full understanding of the positions' duties and responsibilities than would RC officer incumbents.

CONTENT OF THE QUESTIONNAIRE

In addition to a set of administrative questions, the questionnaire was divided into three basic sections:

1. Questions relating to the 33 learning objectives for Phase I JPME. These learning objectives are focused on the "understand" level of learning; they are listed in Appendix B.[3]

2. Questions relating to the eight learning objectives for Phase II JPME. These learning objectives, focused on the "application" level of learning, are listed in Appendix C.

3. Four work-related questions:[4]

   - Is the officer required to work with two or more Military Departments or agencies?

   - Is the officer required to work on military operations or operations support activities, as opposed to activities other than military operations or operations support?

   - What is the primary focus of the officer's work—for example: plans, doctrine, intelligence, administration, law, medicine?

   - What percentage of the officer's time is committed to joint activities: less than 25 percent, 25-50 percent, or more than 50 percent?

[3] We sought to keep the questions relating to learning objectives from being overtly or obviously related to education. We were concerned that, in order to receive better prepared officers, respondents might tend to overemphasize officers' required educational preparation.

[4] In these questions, we asked the supervisor to describe the types of duties and responsibilities associated with the billet in question. The questions asked for specific information regarding the primary focus, the subject matter, and the type of work associated with the billet. A copy of these questions is included as Appendix D.

SURVEY RESPONSE RATE

Table 2-2 shows the numbers of responses and their corresponding return percentages for the questionnaires sent. High rates of response were experienced for all organizations. An overall response rate of 78 percent is excellent for this type of survey.

Table 2-2. Table Survey Responses and Percentages, by Joint Organization

Joint organizations	Questionnaires returned	Percent returned
Combatant commands		
Atlantic Command	583	91%
Central Command	209	96%
European Command	221	86%
Pacific Command	413	68%
Southern Command	170	85%
Space Command[a]	138	76%
Special Operations Command	165	96%
Strategic Command	96	100%
Transportation Command	90	100%
NATO	11	100%
Subtotal	2,096	85%
Office of the Joint Chiefs of Staff		
Joint Staff	65	89%
National Defense University	12	86%
Subtotal	77	89%
Office of the Secretary of Defense[b]	123	80%
Defense agencies and activities		
Small agencies and other activities[c]	84	88%
Defense Intelligence Agency	549	66%
Defense Logistics Agency	473	63%
Subtotal	1106	66%
Total	3,402	78%

Source: Source: Joint Organizations' manpower authorization documents as of mid-1996. See Appendix A for detailed data on billets in joint organizations by RC and grade.

[a] Includes NORAD.

[b] Includes RFPB and NCESGR.

[c] Includes DFAS, DISA, POW/MIA Office, AFIS, BMDO, DLSA, and DODIG.

ANALYSIS OF THE RESPONSES

Some questions asked the supervisors to assess the specific abilities required by the RC officers to perform their assigned duties and responsibilities. Other questions sought information on the extent and intensity of joint activities that required involvement by the RC officers. Analysis of the responses, when taken together, made it possible to identify how many positions required the incumbent to do genuine joint work needing educational preparation.

The knowledge and abilities needed for incumbents provided information related to accomplishment of JPME educational learning objectives, while information dealing with the extent and intensity of the work told us whether the incumbents were required to perform work on joint matters. By starting with those incumbents who need to have achieved at least one of JPME's learning objectives, and proceeding to test the work of those incumbents for "jointness," we deduced the number of RC officers needing JPME.[5]

Southern Command Example

Using the United States Southern Command (SOUTHCOM) as an example, it is possible to show how the analysis was accomplished. As shown in Table 2-1, there are 199 RC officer billets (Grades O-4 through O-6) assigned to SOUTHCOM. Table 2-2 reflects that 170 questionnaires were returned, for an 85 percent return rate.

BASIC JPME[6] FOR SOUTHERN COMMAND RC OFFICERS

After extrapolating the answers received so that they represented all 199 RC positions in the organization, we undertook the following reasoning process for basic JPME, based on the content of the supervisors' answers:

1. If the achievement of only one of basic JPME's 33 learning objectives were needed by incumbents to perform the job satisfactorily, we observed that 133 officers filling those positions would require Phase I JPME. None of the supervisors reported their positions as requiring the accomplishment of all 33 Phase I JPME learning objectives.

2. The requirement of any position for the skills representing the attainment of at least one Phase I learning objective became a necessary but insufficient condition for designation as a job that needed a Phase I-qualified incumbent. Beginning with the 133 billets so identified, we applied four additional tests (represented by the work-related questions on the questionnaire) to identify those billets whose incumbents were actively and extensively involved in joint

[5] We followed this process twice: once for Phase I JPME and once for Phase II JPME.

[6] Throughout this report we use "Basic" and "Phase I" JPME interchangeably.

work. This screening resulted in the identification of 95 positions whose incumbents would need basic JPME

ADVANCED JPME FOR SOUTHERN COMMAND RC OFFICERS

A similar process was used to determine the number of SOUTHCOM-bound RC officers who would need advanced JPME to perform their jobs satisfactorily.[7] A total of 71 RC officer billets were identified by their supervisors as needing incumbents who had achieved at least one of the eight learning objectives of Phase II JPME. Of those 71, two appeared as requiring all eight learning objectives. As before, we conducted the screening process by reviewing the nature of the work in the 71 jobs using answers from the four work-related questions of the questionnaire. The result of that screening was the identification of 46 positions whose incumbents need advanced JPME to perform their work adequately. Table 2-3 displays the SOUTHCOM requirements data for both basic and advanced JPME

Table 2-3. SOUTHCOM Example of RC JPME Analysis Results

Officers required to have achieved learning objectives	Numbers of officers needing basic JPME	Numbers of officers needing advanced JPME
All of the learning objectives	0	2
At least one of the learning objectives	133	71
At least one of the learning objectives, *plus* extensive involvement in joint work	95	46

In SOUTHCOM, therefore, 95 positions require basic JPME and 46 positions require advanced JPME.

DEVELOPMENTS DURING THE STUDY

As the study progressed, we kept our sponsors informed of developments, observations, and findings. With the completion of our initial analyses, it became evident that a sound requirement existed for providing at least some JPME to a large number of RC officers. Upon briefing representatives of the Office of the Assistant Secretary of Defense for Reserve Affairs (OASD[RA]) and the Joint Staff (J-7/MED) in March 1997, we were asked to convene a workshop of military education experts to explore ways to provide this education to RC officers and to

[7] Advanced JPME is not equivalent to Phase II JPME. The separate, 12-week Phase II course at AFSC is simply too long to permit RC officers to attend regularly. RC officers requiring more than Phase I JPME should attend "advanced JPME," which is JPME beyond Phase I, but at an intensity and in a configuration to be determined later. We believe that this advanced JPME should resemble Phase II JPME in many ways, but that it should be configured to accommodate the particular needs of RC officers. Throughout this report, we use "advanced JPME" to refer only to this (as yet undefined) RC officer-oriented course.

discuss the possible content and configuration of any such education. The workshop was held at LMI on 19 to 20 May 1997.

First Workshop on JPME for RC Officers

The workshop was sponsored jointly by OASD(RA) and the Joint Staff (J-7/MED). Attendees included academic experts (deans, curriculum developers, faculty members, and policy makers) from most of the PME schools[8] and PME-responsible staff members from OASD(RA) and J-7/MED, as well as LMI facilitators.

Workshop attendees endorsed the overall need for JPME for RC officers and suggested consideration of several alternative methods for providing this education, including an outline of the general curricula that should be included. Most important, however, workshop members suggested a formal DoD effort to study the delivery of RC JPME, in order to identify actions that OASD(RA) and J-7/MED could take to proceed constructively. The notes of the May 1997 workshop are contained in Appendix E.

The need for basic JPME for RC officers was at this time not supported by a consensus of PME educators. The DoD leaders of the RC JPME initiative therefore decided to defer any action on basic JPME for the time being. Based on our research, described in Chapter 3, however, we believe that a separate initiative for basic JPME for RC officers is warranted. This report includes a recommendation to that effect.

Steering Committee

Subsequent to, and on the basis of the recommendations of the May workshop attendees, the Assistant Secretary of Defense for Reserve Affairs (ASD[RA]) and the Director of the Joint Staff agreed to establish jointly a steering committee to oversee efforts to improve RC officer access to advanced JPME. Membership of the steering committee, in addition to the sponsors, included the Deputy Assistant Secretaries (Reserve Affairs) of the Military Departments, the RC Chiefs, the President of the NDU, and the Director of Reserve and Training, U.S. Coast Guard.

The steering committee's objective was to ensure that an avenue be made available for RC officers to receive the education needed to equip them to perform more effectively in the joint arena, both in peacetime and in contingency operations. At the first meeting of the steering committee, on 20 August 1997, the committee chartered a senior-level working group to develop proposals on the

[8] Schools represented included the NDU headquarters, AFSC, Army War College (AWC), CGSC, NavWar, Marine Corps War College (McWAR), and Air Command and Staff College (ACSC).

curriculum and delivery methods for RC officers to obtain advanced JPME. Upon completion of this work by the working group, the steering committee would review and validate the proposed actions for delivery of the desired JPME.

Senior-Level Reserve Component Working Group and Second Workshop

The charter for the working group, as provided by the steering committee, was to evaluate, analyze, and recommend methods and possible vehicles for providing RC officers JPME beyond Phase I. This advanced JPME would need to meet a sufficient number of the desired learning objectives in the existing JPME Phase II curriculum, be customized to accommodate the limited time availability of RC officers, keep costs to a minimum, and provide an educational environment fostering acculturation to and greater understanding of the joint arena.

The working group met for a workshop on 22–23 September 1997 at LMI. Upon completion of the workshop, the group provided the steering committee a general implementation plan leading from the present time and conditions to an operational advanced JPME program for RC officers. Important aspects of this report are discussed in Chapters 3 and 4, and a complete copy of the report is in Appendix F.

POSITION MANAGEMENT

Early in the study, we observed that serious anomalies existed in the management of RC officer positions in joint organizations. Three sources of data were plumbed: the Services' manpower authorization files, the joint organizations' manning documents, and the Defense Manpower Data Center's manpower files. These sources did not often agree, and in some instances the disagreement was significant.

It is not clear whether the principal cause lies in the gaining organizations, in the several RCs, in any intermediary Service organizations, or in all of these. But it is clear that the problem is widespread, and it affects all RCs and all joint organizations. Disagreement may be attributed to different "dates" of the files, to the time lag in making changes throughout the system, to the confusion caused by the zero-based review of wartime manpower needs that occurred during the period of this study, and to simple inaccuracies in maintaining the data. In all cases, billet information originating in all organizations must pass through intermediate organizations (or staff sections) before reaching personnel managers in the RCs, thereby increasing the likelihood of delay and the possibility of error.

Recognizing these problems, we elected to use the information contained in each joint organization's manning document for our survey of position supervisors. Unfortunately, this step did not prevent all accounting problems from becoming

troublesome to our work. The documentation we used normally identified each position as Active Component or RC, but did not differentiate between IMA and AGR billets. As a result, we do not classify them separately in this report (USAR and USAFR positions shown include both IMA and AGR billets). In the case of ARNG and ANG positions, however, we were able to make separate identification through the help of the staff of the National Guard Bureau. All National Guard positions are AGR positions.

Chapter 3
Basic JPME for RC Officers

INTRODUCTION

This chapter discusses intermediate-level PME, basic JPME, and related issues dealing with RC officers. As mentioned in Chapter 1, basic JPME is imbedded in the resident and nonresident intermediate-level and senior-level PME courses of all the Military Services. This chapter will focus on the nonresident courses at the intermediate level, because nonresident courses are the ones that most RC officers attend. While basic JPME is imbedded in all the senior-level PME courses, these courses are not reasonable alternatives for obtaining basic JPME, for three reasons: more than 50 percent of the positions requiring basic JPME are for O-4s, who are not eligible to attend senior-level PME; only the Air War College and the Army War Colleges have nonresident courses at the senior level; and intermediate-level PME is a prerequisite for these courses, so anyone attending should already have completed intermediate-level PME.

We will also concentrate on the part-time RC officers who are IMAs, because over 90 percent of the reserve positions we surveyed are IMA positions, and the pressures faced by part-time RC officers are different from those faced by full-time RC officers, or AGRs. It is important to note that IMA positions do not exist in either the Army or Air National Guard. The only Guard positions in the joint organizations are AGR positions.

This chapter covers the following topics: the PME and JPME opportunities available to RC officers, the requirements for RC officers who have completed these courses, the supply of such officers, and the impact of personnel management policies on all of the above. It concludes with some observations about the present JPME system and RC officers.

PME COURSES FOR RC OFFICERS

As mentioned previously, RC officers usually attend PME in a nonresident status.

At present, nonresident courses are offered in three formats as follows:

- *Seminar.* A seminar course is a formal group of students who meet weekly (or at least regularly) to work on a certain lesson at each meeting and who take their tests together. Seminar courses have a designated leader who may be a faculty member or a student.[1]

- *Correspondence.* A correspondence course is a self-paced, work alone course. The student usually receives instructional materials in the mail and returns his or her completed work the same way. Correspondence courses often require one or more short periods of active duty at the educational institution for students to complete these courses successfully.

- *CD-ROM.* A CD-ROM course is similar to a correspondence course. The student receives instructional materials on the CD-ROM instead of in book format, but it is a self-paced, work-alone course. This type of course requires that the student have access to a personal computer with a CD-ROM drive.

All the Service PME schools offer intermediate-level nonresident PME courses containing basic JPME that are attended by RC officers: the CGSC, the College of Naval Command and Staff (CNCS), the Air Command and Staff College (ACSC), and the Marine Corps Command and Staff College (MCC&SC). These courses vary in format, length, and enrollment policy. The various courses of each school are discussed below.

Army Command and General Staff College

CGSC offers nonresident intermediate PME in two formats: seminar and correspondence. Enrollment is open to all officers meeting the prerequisites.

The seminar version is taught by USAR officers from the Professional Development Education Brigades (of the U.S. Army Reserve Command). Seminar classes are held in many locations around the United States and Europe. Students are expected to keep pace with their seminar and to attend two 2-week resident phases. The CGSC seminar version is designed to be completed in 24 to 36 months.

The CGSC course is also available as a traditional correspondence course. Students work alone, completing the subcourses at their own pace. The CGSC correspondence version is designed to be completed in 36 months.

[1] Seminars conducted by CNCS are led by faculty members. Seminars that are part of ACSC and the Air War College are led by student seminar members.

College of Naval Command and Staff

CNCS offers nonresident intermediate PME in two formats: seminar and correspondence. Enrollment in both courses is limited.

The seminar version is faculty-led and is offered at only a few locations. Unlike the ACSC seminar, it is not offered at most Navy installations. RC officers who wish to attend compete for seats with Active Component officers, who are accommodated first. Students are expected to keep pace with their class and attend all seminar meetings. The CNCS seminar is designed to be completed in 30 months.

CNCS is also offered in a traditional correspondence course version. Enrollment is limited because the sponsoring institution is unable to grade large numbers of tests and papers. This is unlike the ACSC CD-ROM and CGSC correspondence courses, in which anyone meeting the prerequisites can enroll. The CNCS correspondence course is designed to be completed in 24 months.

Air Command and Staff College

ACSC now teaches nonresident PME in two formats: seminar and CD-ROM. The traditional correspondence course version of ACSC is being phased out, and new students can no longer enroll. Students who cannot take the seminar version must now enroll in the CD-ROM version of the course. Enrollment in both courses is open—that is, available to any officer who meets the prerequisites.

The seminar version of the course is offered at most air bases worldwide. Seminars are student-led, and students are expected to keep up with their seminar—that is, take the tests on schedule and attend seminar meetings. All seminars worldwide conduct the same lesson at approximately the same time so that an officer who is traveling can attend another seminar and not miss a lesson. The ACSC seminar course is designed to be completed in 11 months.

The CD-ROM version of the course requires the student to have access to a personal computer with a CD-ROM drive. As with a correspondence course, the student works through the lessons alone and at his or her own pace. The ACSC CD-ROM course is designed to be completed in 12 to 36 months.

Marine Corps Command and Staff College

MCC&SC offers one nonresident intermediate-level PME course, through its Marine Corps College of Command and Staff Nonresident Program (MCC&SCNP). It is taught in one format only, correspondence. Enrollment is open—that is, available to any officer who applies and meets the prerequisites. The MCC&SCNP course is designed to be completed in 24 months.

RC OFFICER REQUIREMENTS FOR BASIC JPME

Using the results of the questionnaire and the analytical methods described in Chapter 2, we determined the number of RC positions in joint organizations whose incumbents require basic JPME. These are positions for officers in the grades of O-4 to O-6 only. Table 3-1 below shows these positions by joint organization.

Table 3-1. RC Basic JPME Requirements, by Joint Organization

Joint organizations	Billets by organization[a]	Numbers requiring basic JPME
Combatant commands		
Atlantic Command	639	227
Central Command	217	119
European Command	258	141
Pacific Command	603	370
Southern Command	199	95
Space Command[b]	181	96
Special Operations Command	172	80
Strategic Command	96	22
Transportation Command	90	58
NATO	11	10
Subtotal	2,466	1,218
Office of the Joint Chiefs of Staff		
Joint Staff	73	39
National Defense University	14	7
Subtotal	87	46
Office of the Secretary of Defense[c]	153	60
Defense agencies and activities		
Defense Intelligence Agency	838	579
Defense Logistics Agency	745	48
Small agencies and other activities[d]	96	6
Subtotal	1,679	633
Total	4,385	1,957

Source: Joint organizations' manpower authorization documents as of mid-1996. See Appendix A for detailed data on billets in joint organizations by RC and grade. See Appendix A for detailed data on JPME requirements by joint organization, RC, grade, and JPME level.

[a] Grades O-4 through O-6.

[b] Includes NORAD.

[c] Includes all normal OSD staff elements, plus RFPB and NCESGR.

[d] Includes DFAS, DISA, POW/MIA Office, AFIS, BMDO, DLSA, and DODIG.

The 1,957 positions requiring JPME represent 45 percent of all the RC officer positions authorized. Over 90 percent of these positions are for IMAs, RC officers who are part-time members of their joint organizations. The remaining few positions call for AGR officers serving full-time tours of duty. Table 3-2 shows the grade distribution of these positions for all joint organizations, combined by Service. This information is extracted from Tables 2 and 4 in Appendix D, which show the numbers of positions by grade in each organization as well as those requiring basic JPME, by grade and organization.

Table 3-2. Distribution of RC Positions in Joint Organizations by Grade, Service, and RC

Positions	O-4	O-5	O-6	Total
Total Army RC positions	857	537	143	1,537
USAR	(852)	(520)	(129)	(1,501)
ARNG	(5)	(17)	(14)	(36)
Army RC positions requiring basic JPME	395	267	70	732
USAR	(392)	(256)	(59)	(707)
ARNG	(3)	(11)	(11)	(25)
Total Naval Reserve positions	778	507	132	1,417
USNR positions requiring basic JPME	306	203	50	559
Total Marine Corps Reserve positions	137	95	18	250
USMCR positions requiring basic JPME	84	51	8	143
Total Air Force RC positions	703	364	100	1,167
USAFR	(403)	(224)	(47)	(1,144)
ANG	(0)	(6)	(17)	(23)
Air Force RC positions requiring basic JPME	291	181	44	516
USAFR	(291)	(178)	(30)	(499)
ANG	(0)	(3)	(14)	(17)
Total Coast Guard Reserve Positions	4	10	0	14
USCGR positions requiring basic JPME	2	5	0	7

Notes: 1. ANG = Air National Guard; ARNG = Army National Guard; JPME = Joint Professional Military Education; RC = Reserve Component; USAFR = U.S. Air Force Reserve; USAR = U.S. Army Reserve; USCGR = U.S. Coast Guard Reserve; USMCR = U.S. Marine Corps Reserve; USNR = U.S. Naval Reserve.

2. Figures in parentheses are included in appropriate subtotals, above.

In every Service except the Coast Guard, more than half of the positions requiring basic JPME are O-4 positions. Overall, more than 90 percent are in grades O-4 and O-5.

IMPACT OF CULTURE ON PME ATTENDANCE

While RC officers attend PME for a variety of reasons, to a significant extent their participation is controlled by the culture (and reward structure) of their Service and component. PME is attractive to RC officers, regardless of Service or component, because it is a source of retirement points. In addition to serving as an enchancement to some RC careers, it attracts those who enjoy taking courses and enjoy learning for its own sake. The following section describes the reward structure of each Service and the various aspects of Service culture and traditions that relate to PME.

Army

As mentioned in Chapter 1, the Army culture emphasizes PME, and promotion is tied to PME completion. To be eligible for CGSC intermediate-level PME, an Army officer must have completed a basic course as lieutenant, an advanced course as a lieutenant or captain, and the Combined Arms Services Staff School (CAS^3) as a captain. Under the current system, CAS^3 is a prerequisite for promotion to major for RC officers. While the Army culture emphasizes PME, Army RC officers may be deterred from early enrollment in CGSC because they have experienced intense demands on their personal time, having already taken so many hours of nonresident courses. A further deterrent to early enrollment in CGSC is that selection to lieutenant colonel in the USAR and ARNG requires completion of only 50 percent of CGSC.[2]

Navy

The Navy culture does not emphasize PME. The residual Navy philosophy is that time in the fleet is more important than attendance at PME. While GNA has begun to change this philosophy slowly, formal Navy policy calls for attendance at intermediate- or senior-level PME but not both. This policy is unlike that of all the other Services. The resulting low numbers of intermediate-level PME completers can be seen in Tables 3-3 and 3-4 below.

Air Force

The Air Force culture emphasizes PME. Service policy is to send Active Component officers to intermediate-level (ACSC) PME as early as possible after selection for promotion to the rank of major. The ACSC selection board meets immediately after the promotion board and considers the same pool of officers.

[2] The window of opportunity for RC Army officers to opt for nonresident CGSC attendance is open for about five years. There is no powerful incentive for those officers to enroll early, during years one or two in the period, and we believe that late enrollees are more common. Senior O-4s are not attractive nominees for O-4 billets in joint organization because of their impending likely promotion to O-5.

Unfortunately, this policy does not carry over to the Air Force Reserve and Air National Guard. Like RC officers of all the components, the Air Force's RC officers must apply for ACSC. Therefore, individual officers have complete control over when to attend intermediate-level PME. However, RC officers being considered for selection to lieutenant colonel are expected to have completed ACSC, providing a strong incentive to attend and complete ACSC.

Marine Corps

While it had historically resembled the Navy's PME culture for some time, Marine Corps culture now diverges from the Navy's. RC officers are expected to have completed intermediate-level PME prior to consideration for selection to lieutenant colonel. As expected, Tables 3-3 and 3-4 show higher numbers of completers in the Marine Corps than in the Navy.

National Guard

Both the Army and Air National Guard cultures emphasize PME to a greater extent than their respective reserve counterparts, the USAR and USAFR. This is reflected in the information in Tables 3-3 and 3-4 in the next section.

SUPPLY OF GRADUATES

Supply versus Inventory

Tables 3-3 and 3-4 show the number of officers in the officer inventories who had completed intermediate-level PME as of 31 March 1997 by grade, Service, and component. The number in parentheses is the ratio of completers to the total number of officers in this grade and component as of 31 March 1997.

Table 3-3. Officers in Grade O-4 Who Had Completed Intermediate-Level PME as of 31 March 1997

Service	Active	Guard	Reserve
Army	9,662 (74.6%)	4,311 (70.7%)	3,557 (33.2%)
Navy	542 (5.0%)	n/a	16 (>1.0%)
Marine Corps	71 (2.1%)	n/a	242 (12.1%)
Air Force	7,232 (45.8%)	1,091 (26.6%)	1,228 (25.4%)

Table 3-4. Officers in Grade O-5 Who Had Completed Intermediate-Level PME as of 31 March 1997

Service	Active	Guard	Reserve
Army	7,135 (77.9%)	3,086 (85.3%)	5,665 (66.7%)
Navy	967 (13.4%)	n/a	12 (>1.0%)
Marine Corps	156 (9.1%)	n/a	192 (26.3%)
Air Force	3,554 (34.5%)	1,429 (51.5%)	1,337 (44.2%)

RC Officer Supply versus Basic JPME Requirements

We now compare the supply of RC intermediate PME graduates, as of 31 March 1997, to the number of joint organization RC positions requiring basic JPME, by Service.

ARMY

The Army has 392 USAR O-4 positions that require basic JPME (see Table 3-2) and more than 3,500 USAR majors in the inventory who have completed intermediate-level PME. There are also 256 USAR O-5 positions requiring basic JPME and more than 5,600 USAR lieutenant colonels in the inventory who have completed intermediate-level PME.

The Army has 3 ARNG O-4 positions that require basic JPME (see Table 3-2) and more than 4,300 ARNG majors in the inventory who have completed intermediate-level PME. There are also 17 ARNG O-5 positions requiring basic JPME and more than 3,000 ARNG lieutenant colonels in the inventory who have completed intermediate-level PME.

NAVY

The Navy has 180 USNR O-4 positions that require basic JPME and 16 USNR lieutenant commanders who have completed intermediate-level PME. There are also 153 RC O-5 positions requiring basic JPME and 12 USNR commanders who have completed intermediate-level PME.

MARINE CORPS

The Marine Corps has 83 USMCR O-4 positions that require basic JPME and 242 USMCR majors in the inventory who have completed intermediate-level PME. There are also 37 RC O-5 positions requiring basic JPME and 192 USMCR lieutenant colonels who have completed intermediate-level PME.

AIR FORCE

The Air Force has 291 USAFR O-4 positions that require basic JPME (see Table 3-2) and more than 1,200 USAFR majors in the inventory who have completed intermediate-level PME. There also are 178 USAFR O-5 positions that require basic JPME and more than 1,300 USAFR lieutenant colonels in the inventory who have completed intermediate-level PME.

The Air Force has no ANG O-4 positions that require basic JPME (see Table 3-2). There are 3 ANG O-5 positions requiring basic JPME and more than 1,400 ANG lieutenant colonels in the inventory who have completed intermediate-level PME.

IMPACT OF PERSONNEL MANAGEMENT POLICIES

Like Service culture, personnel management policies have a substantial impact on PME attendance. This section discusses two policy areas that affect PME attendance: the PME selection process, and the position selection and rotation policies.

PME Selection Process

Perhaps the most important difference between the Active Component and RC PME experiences is the selection process involved. Active Component officers in all Services are automatically considered for PME attendance. PME selection boards screen all eligible officers, and the individual officer does not have to do anything in order to be considered. In contrast, RC officers of all Services must apply to attend or enroll in PME. One result is that individual RC officers control the timing of their attendance at PME. As is not the case in the Active Component, the needs of the Service and the capacity of the PME school are not part of the PME-attendance decision.

Position Selection and Rotation Policies

IMA POSITIONS

The Sea Services manage all RC position assignments centrally. RC officers are deliberately selected for positions and scheduled to rotate every three years. The selection process allows the component the opportunity to compare the qualifications of the officer to the requirements of the position, compare the officers with one another, and then select the best qualified person for the position.

The Army and the Air Force differ from the Sea Services in how they select RC officers for IMA positions. In the Army and Air Force, the Service reserve personnel center maintains a list of vacant positions and their required qualifications (usually limited to grade and skill). Officers select the positions they are interested in, and they are assigned on the basis of the required qualifications. Geographic

proximity is an important consideration, because individual officers must fund their own travel and expenses for any training other than a two-week annual training tour, for which the component funds the travel. While applicants must be qualified for the position, they are seldom compared to any other applicant for it. There is no specific rotation policy. In general, Army and Air Force Reservists self-select for IMA positions and stay in them for as long or short a time as they choose. Essentially, individual officers control position assignments, and the needs and requirements of the Service are not considered except as individual assignments are made.

AGR Positions

AGRs are managed centrally by component, meaning that they are screened to assure that they are qualified for position assignments, programmed to attend PME (or any other required education or training) in accordance with the needs of the Service, and scheduled to rotate periodically. AGR officers, like Active Component officers, are nominated for the positions they will fill in the joint organization, giving the Commander-in-Chief (CINC) or agency director the opportunity to reject a candidate for a joint assignment. None of the RCs nominate officers for IMA positions in joint organizations.

Observations

We have now discussed the PME opportunities available to RC officers and have seen the results these courses produce in terms of basic JPME-qualified officers by Service, component, and grade. We have compared this supply of officers to the positions in joint organizations that require basic JPME qualification, and we have seen some mismatches. The impact of Service culture and other policies has also been reviewed. It is now time consolidate our observations.

- PME courses are long. If a part-time RC officer were to enroll in a PME course upon assignment to a joint position, it would take him or her at least a year to complete basic JPME and probably longer. ACSC is the only intermediate-level PME course intended to be completed in this short length of time, one year, while all the others require longer study.

- Naval Reserve officers have very few opportunities to complete basic JPME, since enrollment in the nonresident CNCS is limited. This condition is compounded by the Navy culture, which has not valued PME, and by Navy policy, which discourages or prohibits attendance at either intermediate or senior PME.

- The promotion incentive in the USAFR, ANG, and USMCR leads to completion of intermediate-level PME as a senior major, in time for the lieutenant colonel selection board. In the USAR and ARNG, this incentive leads to

completion of intermediate-level PME as a lieutenant colonel. The problem is that most positions requiring basic JPME are graded for majors (O-4s).

- The pool of USNR officers is too small to fill the existing positions with basic JPME graduates. As of 31 March 1997, while there were 16 lieutenant commanders and 12 commanders who were intermediate-level PME graduates, there were 305 and 203 positions requiring, respectively, O-4 and O-5 basic JPME graduates.

- If geography is not considered, the pool of basic JPME-qualified USAFR, USAR, and USMCR officers appears adequate to fill the requirements. We know, however, that geographic proximity is an important consideration for drilling positions and that therefore, the apparently robust pool of officers in all three components may be overwhelmed.

- While the Sea Services have a system for selecting and rotating RC officers, only the USMCR has an adequate pool of basic JPME-qualified officers.

- Because the USAFR and the USAR do not have a system for selecting and rotating RC officers, self-selection and the importance of geography may negate the size of the pool of basic JPME-qualified officers.

- The limited number of ARNG and ANG positions, for both O-4s and O-5s, that require basic JPME pose4 a sharp contrast with the relatively large inventories of majors and lieutenant colonels in these components who have completed intermediate-level PME. The National Guard should not have significant trouble filling their assigned positions in joint organizations with basic JPME-qualified officers.

These observations lead us to conclude that the current system for producing basic JPME-qualified RC officers through completion of intermediate-level PME is largely inadequate to fill the joint positions requiring this level of education. The Navy cannot educate enough USNR officers at this level to fill its positions. The other Services have problems of geography and timing of the education. All the courses are long. The happy supply-and-demand situation existing in the two National Guard components affects relatively few positions.

The joint organizations need their positions filled with qualified (or soon to-be qualified) RC officers. An additional initiative is needed.

Chapter 4
Advanced JPME for RC Officers

INTRODUCTION

This chapter discusses advanced JPME, or that joint military education proposed for RC officers beyond Phase I JPME.[1] As mentioned in Chapter 1, Phase II JPME is provided by three NDU schools: NatWar, ICAF, and AFSC. These programs now provide all the Phase II JPME graduates needed for the active forces under the organizational manning requirement dictated by GNA.

This chapter covers the following topics: the advanced JPME opportunities available for RC officers, the number of RC positions in joint organizations requiring officers educated at the advanced JPME level, the senior-level working group recommendations for providing advanced JPME to RC officers, and the annual training rates to educate officers assigned to the selected positions in joint organizations.

OPPORTUNITIES FOR RC OFFICERS TO ACQUIRE ADVANCED JPME

Fewer than 20 RC officers each year are selected to attend the resident programs of NatWar or ICAF. As previously discussed, RC officer attendance at the 12-week Phase II program at AFSC is also nearly nonexistent. Therefore, Phase II joint education is provided in resident status only. There is no means to obtain Phase II JPME through non-resident means. There are two primary reasons for this:

1. *Application Orientation of Instruction.* The learning objectives associated with the well-established Phase II education at the three NDU colleges all emphasize the application (as differentiated from understanding and knowledge only) of military principles, theory, and practices under joint conditions. Indeed, this focus on application is what truly sets Phase II JPME apart from the knowledge-oriented basic JPME. And application is taught best through practice and repetition under near-real (or closely simulated) conditions that the student will face in the near future. The very nature of nonresident study makes the repetitive practice of routines difficult at best. Hence, DoD has offered its application-oriented teaching of Phase II JPME in resident programs only.

[1] Advanced JPME is not equivalent to Phase II JPME. See footnote 7, p. 2-6.

2. *Acculturation of Students.* It is by now generally understood and widely accepted that the single most important ingredient of successful joint military learning is the student's assimilation of the thought patterns, ambiance, capabilities, limitations, and historical perspectives—in short, the culture—of the other Military Services and other national military forces represented by fellow students. It is insufficient simply to learn about others' differing approaches, tactics, abilities, and limits. One needs to go beyond understanding and begin to "think like and even act like" his or her military associates from other Services or nations. The academic programs at NatWar and ICAF have the luxury of an academic year to bring about the acculturation required by their Phase II JPME curricula. The Phase II JPME program at AFSC, however, demands that this acculturation be achieved in only 12 weeks. AFSC leaders help achieve this objective by assigning all one's student roommates from other Services.[2] Likewise, work teams, seminar groups, and all other such student groups—as well as the AFSC faculty—represent a true cross section of U. S. Military Services.

What this resident study dependence means for RC officers, of course, is that there is almost no opportunity for them to attend Phase II JPME, whatever the need. There is therefore no Phase II-qualified pool of RC officers from which to draw properly prepared men and women for assignment to joint organizations.

Any advanced JPME program proposed for RC officers will have to address the double challenge of instilling in RC officer students an ability to apply the theory and practice of joint operations while becoming acculturated to the operational ambiances and practices of their sister Services. Given the RC officer's lack of time to experience the continuous interrelationships and repetitive practices that are a part of resident study, these are difficult challenges to meet.

REQUIREMENTS FOR RC ADVANCED JPME

Using the results of the questionnaire and the methodology described in Chapter 2, we determined the number of RC officers in joint organizations who require advanced JPME. Table 4-1, shows these positions by organization.

[2] AFSC Phase II students are typically assigned to bachelor officer quarters while undergoing Phase II education. They are most likely to be separated from families during this assignment.

Table 4-1. RC Advanced JPME Requirements, by Joint Organization

Joint organizations	Billets by organization[a]	Numbers requiring occupants who have completed advanced JPME
Combatant commands		
Atlantic Command	639	191
Central Command	217	93
European Command	258	106
Pacific Command	603	327
Southern Command	199	46
Space Command[b]	181	66
Special Operations Command	172	63
Strategic Command	96	13
Transportation Command	90	56
NATO	11	1
Subtotal	2,466	962
Office of the Joint Chiefs of Staff		
Joint Staff	73	34
National Defense University	14	6
Subtotal	87	40
Office of the Secretary of Defense[c]	153	39
Defense agencies and activities		
Defense Intelligence Agency	838	150
Defense Logistics Agency	745	36
Small agencies and other activities[d]	96	4
Subtotal	1,679	190
Total	4,385	1,231

Source: Joint organizations' manpower authorization documents as of mid-1996.

Note: See Appendix A for detailed data on billets in joint organizations by RC and grade. See Appendix A for detailed data on JPME requirements by joint organization, RC, grade, and JPME level.

[a] Grades O-4 through O-6.

[b] Includes NORAD.

[c] Includes all normal OSD staff elements, plus RFPB and NCESGR.

[d] Includes DFAS, DISA, POW/MIA Office, AFIS, BMDO, DLSA, and DODIG.

The incumbents in these 1,224 RC billets (which equate to about 28 percent of all the RC positions in joint organizations) require JPME at a level beyond JPME Phase I. That number represents the quantitative requirement for the advanced JPME preparation of RC officers in joint organizations. This total is not sensitive to the number of positions unoccupied, to turnover, or to other important aspects

of the management of the military personnel involved. Simply said, the officers who occupy these billets need this preparation.

Table 4-2 shows the grade distribution of these positions for all joint organizations by grade, Service, and RC.

Table 4-2. Distribution of Positions in Joint Organizations by Grade, Service, and RC

Positions	O-4	O-5	O-6	Total
Total Army RC positions	857	537	143	1,537
USAR	(852)	(520)	(129)	(1,501)
ARNG	(5)	(17)	(14)	(36)
Army RC positions requiring advanced JPME	223	175	58	456
USAR	(220)	(164)	(47)	(431)
ARNG	(3)	(11)	(11)	(25)
Total Naval Reserve positions	778	507	132	1,417
USNR positions requiring advanced JPME	170	140	41	351
Total Marine Corps Reserve positions	137	95	18	250
USMCR positions requiring advanced JPME	44	35	8	87
Total Air Force RC positions	703	364	100	1,167
USAFR	(703)	(358)	(83)	(1,144)
ANG	(0)	(6)	(17)	(23)
Air Force RC positions requiring advanced JPME	169	126	29	324
USAFR	(169)	(123)	(15)	(307)
ANG	(0)	(3)	(14)	(17)
Total Coast Guard Reserve Positions	0	10	4	14
USCGR positions requiring advanced JPME	0	5	1	6

Notes: 1. ANG = Air National Guard; ARNG = Army National Guard; JPME = Joint Professional Military Education; RC = Reserve Component; USAFR = U.S. Air Force Reserve; USAR = U.S. Army Reserve; USCGR = U.S. Coast Guard Reserve; USMCR = U.S. Marine Corps Reserve; USNR = U.S. Naval Reserve.

2. Figures in parentheses are included in appropriate subtotals, above.

In all RCs except the USCGR, about half of the positions requiring advanced JPME are O-4 positions. The number of O-4s plus O-5s requiring advanced JPME is 90 percent of all positions needing incumbents with that kind of military education.

THE ADVANCED JPME INITIATIVE

Approaching the Problem

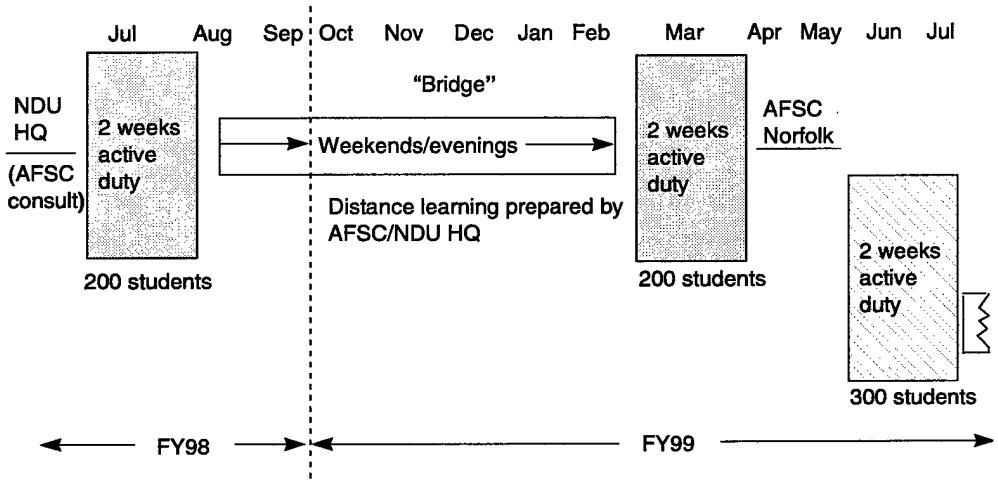
Since virtually no opportunity exists for RC officers to obtain JPME at a level beyond Phase I, there is no pool of RC officers with this advanced ability who could be used to man the positions requiring it. But 1,224 RC positions in joint organizations require advanced JPME. How can this problem be solved?

In September 1997, this question led a steering committee, chaired jointly by the ASD(RA) and the Director of the Joint Staff, to convene a senior-level working group to search for solutions in a special workshop held at LMI. The working group (see Chapter 2) analyzed several different options for providing advanced JPME to RC officers. The full report of the working group is in Appendix E. For the purpose of continuity, included here are the most important recommendations relating to the scope and content of the proposed advanced JPME training program for RC officers.

A "Bookend" Educational Program

Figure 4-1 shows the option selected by the working group and recommended to the steering committee. It would have an initial 200 RC officers attend a two-week resident session commencing in July 1998, conducted by NDU at NDU Headquarters with AFSC curriculum support.

Figure 4-1. Proposed "Bookend" Model



This session would be followed by a non-resident, distance-learning "bridge" developed and operated by AFSC and using various media approaches, including the Internet, video teleconferencing, CD-ROM self-paced instruction, and perhaps seminars. The distance-learning segment would be followed by a final bookend,

or two-week resident course at AFSC in Norfolk. That session would be based on the last two-week section of the current JPME Phase II curriculum, which consists of joint exercises and war games to an extensive degree. This session would begin in March 1999.

The Curriculum

The curriculum for RC officers would be drawn principally from that of the AFSC 12-week JPME Phase II program; the proposed RC program is listed below.

FIRST RESIDENT SESSION, OR BOOKEND—INSTRUCTIONAL TOPICS RECOMMENDED FOR CONSIDERATION

- Orientation
- Introduction to Joint Issues/Perspectives
- Joint Doctrine
- Orientation Exercises
- National Command and Control
- National Command Authority, President, Joint Chiefs of Staff, Secretary of Defense, Congress
- National Security Strategy and National Military Strategy
- Regional Perspective, CINCs
- Service and RC Capabilities
- RC Relationships with the Active Component
- RC Mobilization
- Preliminary Joint Exercise
- Synchronization Effort
- Campaign Plan
- CINC Staff
- Introduction to Distance Learning
- After-Action Review

DISTANCE-LEARNING SEGMENT, ON BRIDGE—INSTRUCTIONAL TOPICS RECOMMENDED FOR CONSIDERATION

Topic	*Suggested Medium*
◆ Joint Doctrine/Joint Warfighting	Self-paced/CD-ROM
◆ Regional Issues	Seminar
◆ Unified Command Plan	Self-paced/CD-ROM
◆ Force Apportionment	Seminar
◆ Joint Strategic Capabilities Plan	Group project
◆ Joint Vision 2010	Self-paced/CD-ROM
◆ Mobilization Policies/Integration	Self-paced/CD-ROM
◆ Regional Contingency Plan	Seminar group project
◆ Current Issues	Self-paced/briefings supported by video teleconferencing

SECOND RESIDENT SESSION, OR BOOKEND—INSTRUCTIONAL TOPICS RECOMMENDED FOR CONSIDERATION

- Orientation Exercise
- Emerging Crisis
- Issues of Joint Operation
- Joint Command, Control, Communications, and Computers (C^4) Integration
- Multinational Issues
- Joint Task Force Operation
- Concept of Future Joint Operations
- Joint Issues/Perspectives
- Crisis Action Exercise
- War Gaming/Simulation

Selection of Student Officers

The working group discussed at some length the issue of who might constitute the initial group of RC officers to attend the prototype program's opening sessions. Three categories of RC officers appear to be appropriate and available to furnish possible attendees:

- Officers now assigned to units of the reserve forces, or to the Individual Ready Reserve, who are being considered for nomination to positions in joint organizations.
- Officers of promise who wish to prepare themselves for the possibility of future assignment to joint organizations. These officers, after completing their courses of instruction, would enter the pool of men and women fully qualified for RC joint assignment.
- Present occupants of selected joint billets whose duties will permit absence for educational enhancement, and whose tours of duty have enough time remaining to warrant this time and effort.

ANNUAL GRADUATION RATES

Given a total requirement of 1,224 RC officers needing advanced JPME, just what does this requirement imply in terms of annual training load? The resultant throughput rate depends on several variables: the rate at which it is advisable for incumbents to be trained, the rate at which incoming officers need to be trained, how many incumbents nearing the end of their assignments are to be trained, and how much education can be afforded each year.

To begin with, the working group recommended establishing a minimum four-year tour length for RC officers in joint organizations. Therefore, in a steady-state situation, we should plan to graduate just over 300 RC officers each year. If it is decided to train officers at a faster pace, however, in order to correct the shortfall more quickly, then the annual training rate could be significantly higher. Conversely, of course, if a slower pace is selected, the graduation rates would be fewer than 300 per year.

Any reasonable calculation of annual graduation rates need to take into account the expected attrition from the educational program. Given the program's length, the part-time aspect of its "bridge" portion, and the need for student officers to devote two separated two-week active duty periods, some attrition over the length of each educational cycle is inevitable. Unfortunately, there is no way now to estimate a reasonable level of attrition for this new program. One approach would be to plan for, say, a 20 percent attrition rate the first year, and then adjust in future years as experience develops.

The first complete program recommended by the senior-level working group would start in July 1998 and accommodate 200 students,[3] with a second program starting in June 1999, accommodating 300 students. This scheduling is shown for four cycles in Table 4-3.

Table 4-3. Student Loads for Advanced JPME by Time and Phase

	July 1998	March 1999	June 1999	March 2000	June 2000	March 2001
First Cycle:						
First Bookend (start-up)	200					
Second Bookend		200				
Second Cycle:						
First Bookend			300			
Second Bookend				300		
Third Cycle:						
First Bookend				300		
Second Bookend					300	
Fourth Cycle:						
First Bookend					300	
Second Bookend						300

[3] With no provision currently made for student attrition.

Chapter 5
Conclusions and Recommendations

CONCLUSIONS

Conclusion 1: Personnel Management

There exists a general and serious personnel management problem in the oversight, administration, and filling of RC officer positions in joint organizations.

We believe that this problem exists in all RCs and in all joint organizations. The testimony of officials interviewed during the study indicates that the problem is rooted in the continuing change and evolution of the billet structure of the organizations themselves. The problem is made acute by the difficulty of providing changes to the supplying RCs soon enough and accurately enough to permit timely and complete adjustment of records and plans. The problem affects the determination of accurate JPME educational requirements, the establishment of instructional plans, and the effective management of the RC officers assigned to joint positions.

Conclusion 2: RC Officers and Joint Work

A large and growing group of RC officers assigned to DoD's joint organizations do joint work, and a number of these officers work on joint matters.[1]

Our survey results show that appreciable numbers of RC officers assigned to joint organizations interact routinely with staff members from other Services or agencies and work on plans for joint task forces and joint and unified military operations. Further, a large proportion of these officers work on teams dealing with important aspects of joint matters generally. Over the span of time required for the completion of the study, most joint organizations have initiated actions to increase the number of RC officers assigned to their units.

[1] Joint matters are "matters relating to the integrated employment of land, sea, and air forces, including matters relating to national military strategy, strategic and contingency planning, and command and control of combat operations under a unified command." (*Joint Publication 1-02*)

Conclusion 3: The Present System and JPME Completion Among RC Officers

The present military educational system provides RC officers assigned to joint organizations who need JPME essentially no opportunity to complete joint education beyond basic JPME. Sea Service officers[2] have had little opportunity to complete even that much.

Some of these officers need to be prepared for their assignments by achieving the learning objectives available only in one or both phases of current JPME programs. The present system clearly does not afford RC officers much opportunity to complete any JPME whatsoever beyond Phase I. In addition, the RC officer reservoirs of Phase I-qualified members in all the Sea Services are now to small to permit the filling of the requisite number of billets with incumbents so qualified. While these same Phase I-qualified reservoirs in the four RCs of the Army and Air Force are much larger, it is not at all clear, except for officers of the ARNG and ANG, that officer qualification requirements for these RCs can be met without additional basic JPME programs being established specifically for RC officers, and especially for officers who are majors.

Conclusion 4: Dynamic Conditions

The outcomes cited in this study represent only one moment in a rapidly shifting tableau.

Whatever actions are taken as a result of this study effort must take into account the rapidly changing nature of DoD's joint organizations. Indeed, between the time we received the manning documents containing information about the RC officer billets we sought and the time the study's survey was sent to joint organizations for completion, the billet structure and profile had changed in every organization surveyed.[3] That change will inevitably continue, and it may increase in velocity.

RECOMMENDATIONS

Recommendation 1: Personnel Management

OSD should act to improve the accuracy and responsiveness of the information interface between the several RCs and all DoD joint organizations so that the related preparation and assignment of RC officers can be managed more effectively.

---

[2] Sea Service officers are members of the Navy, Marine Corps, and Coast Guard.

[3] Perhaps the greatest growth is occurring in Defense Intelligence Agency, where our original billet list described 838 positions. This agency is now proposing a manning document structure containing approximately 1,800 RC officer positions.

RC officer joint schooling and joint assignments cannot be managed effectively without overhauling the billet control and information exchange now taking place between joint units and the RCs. A new policy document from OSD should begin that overhaul.

Recommendation 2: Advanced JPME

OSD and the Joint Staff should promptly establish an advanced JPME program for RC officers who are to serve in selected positions in joint organizations.[4]

The most immediate need for JPME for RC officers is for JPME beyond Phase I. On the basis of earlier informal briefings on the outcomes of this study, OSD has moved to get this program under way. Discussions in Chapter 4 and Appendix D contain information about these developments.

Recommendation 3: Basic, or Phase I, JPME

OSD and the Joint Staff should establish a basic JPME program for officers of the USNR, USMCR, and USCGR and be prepared to do so for the RCs of the Army and the Air Force as well.

Having established the requirement of Phase I JPME completion for entry into advanced JPME (see Appendix D), OSD and the Joint Staff will need to see that special actions are taken to assure compliance with that requirement by the Sea Service RCs, whose officer pools clearly lack enough Phase I completers to meet meaning student input requirements for any new RC advanced JPME program. The basic JPME program for Sea Service officers envisioned here will likely amount to compression or other alteration of their Phase I JPME programs by the intermediate PME schools of the Navy and Marine Corps. The insufficiency problem faced by the Sea Service RCs is aggravated when one considers that an additional number of officers from these RCs will need Phase I alone to be properly prepared for joint work.

In addition, OSD and the Joint Staff should closely monitor the ability of the Army and Air Force RCs to meet Phase I completion requirements. If, as we suspect, the USAR and USAFR begin to have difficulty providing the necessary numbers of qualified officers to joint organizations, then actions similar to those needed for the USNR, USMCR, and USCGR will need to be taken.

[4] The numbers of officers so affected are shown in Chapter 2, and in detail in Appendix A.

Appendix A
Data Tables

This appendix displays summary data originating from this LMI study. The data support the conclusions and recommendations of Chapter 5. The appendix contains the following five tables:

Table A-1. Total Reserve Component Officer Billets in Joint Organizations, by Reserve Component and Organization (1 page)

Table A-2. Total Reserve Component Officer Billets in Joint Organizations, by Reserve Component, Organization, and Grade (3 pages)

Table A-3. Total Reserve Component Officer Billets in OSD and in Small Defense Agencies and Other Activities, by Reserve Component, Organization, and Grade (4 pages)

Table A-4. Total RC Officer Basic JPME Requirements, by Joint Organization, Reserve Component, and Grade (3 pages)

Table A-5. Total RC Officer Advanced JPME Requirements, by Joint Organization, Reserve Component, and Grade (3 pages)

Table A-1. Total Reserve Component Officer Billets in Joint Organizations, by Reserve Component and Organization[a]

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Combatant Commands								
Atlantic Command	180	2	258	80	118	1	0	639
Central Command	98	0	33	32	53	1	0	217
European Command	147	5	62	14	29	1	0	258
Pacific Command	194	0	247	29	133	0	0	603
Southern Command	85	2	33	12	67	0	0	199
Space Command [b]	27	0	46	12	94	2	0	181
Special Operations Command	81	1	44	2	44	0	0	172
Strategic Command	1	0	39	1	55	0	0	96
Transportation Command	27	0	33	3	19	0	8	90
NATO	1	1	5	0	4	0	0	11
Subtotal Combatant Commands	841	11	800	185	616	5	8	2,466
Office of the Joint Chiefs of Staff								
Joint Staff	31	4	15	2	16	5	0	73
National Defense University	5	1	4	3	1	0	0	14
Subtotal Office of the Joint Chiefs of Staff	36	5	19	5	17	5	0	87
Office of the Secretary of Defense [c]	50	14	34	15	25	9	6	153
Defense Agencies & Activities								
Small Defense Agencies and Other Activities [d]	42	6	16	2	26	4	0	96
Defense Intelligence Agency	321	0	204	43	270	0	0	838
Defense Logistics Agency	211	0	344	0	190	0	0	745
Subtotal Defense Agencies & Activities	574	6	564	45	486	4	0	1,679
Grand total	1,501	36	1,417	250	1,144	23	14	4,385

Source: Joint organization manning documents and National Guard Bureau files.

[a] Grades O-4 through O-6.

[b] Includes NORAD.

[c] Includes RFPB and NCESGR.

[d] Includes DFAS, DISA, POW/MIA Office, AFIS, BMDO, DODIG, Drug Enforcement Agency (DEA), Joint Military Intelligence College (JMIC), and Advanced Research Projects Agency (ARPA).

Table A-2. Total Reserve Component Officer Billets in Joint Organizations, by Reserve Component, Organization, and Grade[a]

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Combatant Commands								
Atlantic Command								
O-6	16	1	21	4	8	1	0	51
O-5	80	1	85	35	33	0	0	234
O-4	84	0	152	41	77	0	0	354
Subtotal	180	2	258	80	118	1	0	639
Central Command								
O-6	6	0	1	2	2	0	0	11
O-5	35	0	11	7	12	1	0	66
O-4	57	0	21	23	39	0	0	140
Subtotal	98	0	33	32	53	1	0	217
European Command								
O-6	12	0	0	1	1	1	0	15
O-5	27	3	10	5	9	0	0	54
O-4	108	2	52	8	19	0	0	189
Subtotal	147	5	62	14	29	1	0	258
Pacific Command								
O-6	10	0	12	0	6	0	0	28
O-5	64	0	104	16	50	0	0	234
O-4	120	0	131	13	77	0	0	341
Subtotal	194	0	247	29	133	0	0	603
Southern Command								
O-6	4	0	0	0	3	0	0	7
O-5	17	1	6	7	11	0	0	42
O-4	64	1	27	5	53	0	0	150
Subtotal	85	2	33	12	67	0	0	199
Space Command [b]								
O-6	1	0	5	0	6	2	0	14
O-5	8	0	17	2	27	0	0	54
O-4	18	0	24	10	61	0	0	113
Subtotal	27	0	46	12	94	2	0	181

[a] Grades O-4 through O-6.

[b] Includes NORAD.

Table A-2. Total Reserve Component Officer Billets in Joint Organizations, by Reserve Component, Organization, and Grade (Continued)

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Special Operations Command								
O-6	8	0	3	0	4	0	0	15
O-5	52	1	30	1	25	0	0	109
O-4	21	0	11	1	15	0	0	48
Subtotal	81	1	44	2	44	0	0	172
Strategic Command								
O-6	0	0	5	0	11	0	0	16
O-5	0	0	9	1	17	0	0	27
O-4	1	0	25	0	27	0	0	53
Subtotal	1	0	39	1	55	0	0	96
Transportation Command								
O-6	2	0	2	0	1	0	1	6
O-5	12	0	17	1	10	0	7	47
O-4	13	0	14	2	8	0	0	37
Subtotal	27	0	33	3	19	0	8	90
NATO								
O-6	0	1	0	0	0	0	0	1
O-5	0	0	2	0	0	0	0	2
O-4	1	0	3	0	4	0	0	8
Subtotal	1	1	5	0	4	0	0	11
Subtotal Combatant Commands	841	11	800	185	616	5	8	2,466
Office of the Joint Chiefs of Staff								
Joint Staff								
O-6	4	3	2	0	2	4	0	15
O-5	27	1	13	2	11	1	0	55
O-4	0	0	0	0	3	0	0	3
Subtotal	31	4	15	2	16	5	0	73
National Defense University								
O-6	2	1	1	0	1	0	0	5
O-5	3	0	3	2	0	0	0	8
O-4	0	0	0	1	0	0	0	1
Subtotal	5	1	4	3	1	0	0	14
Subtotal Office of the Joint Chiefs of Staff	36	5	19	5	17	5	0	87

Table A-2. Total Reserve Component Officer Billets in Joint Organizations, by Reserve Component, Organization, and Grade (Continued)

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Office of the Secretary of Defense [c]								
O-6	22	5	15	7	9	7	3	68
O-5	18	8	14	8	9	2	3	62
O-4	10	1	5	0	7	0	0	23
Subtotal	50	14	34	15	25	9	6	153
Defense Agencies and Activities								
Small Defense Agencies and Other Activities[d]								
O-6	11	3	3	2	3	2	0	24
O-5	10	2	7	0	10	2	0	31
O-4	21	1	6	0	13	0	0	41
Subtotal	42	6	16	2	26	4	0	96
Defense Intelligence Agency								
O-6	14	0	15	2	13	0	0	44
O-5	89	0	51	8	65	0	0	213
O-4	218	0	138	33	192	0	0	581
Subtotal	321	0	204	43	270	0	0	838
Defense Logistics Agency								
O-6	17	0	47	0	13	0	0	77
O-5	78	0	128	0	69	0	0	275
O-4	116	0	169	0	108	0	0	393
Subtotal	211	0	344	0	190	0	0	745
Subtotal Defense Agencies and Activities	574	6	564	45	486	4	0	1,679
Totals by Grade								
O-6	129	14	132	18	83	17	4	397
O-5	520	17	507	95	358	6	10	1,513
O-4	852	5	778	137	703	0	0	2,475
Grand Total	1,501	36	1,417	250	1,144	23	14	4,385

Source: Joint organization manning documents and National Guard Bureau files.

[c] Includes RFPB and NCESGR.

[d] Includes DFAS, DISA, POW/MIA Office, AFIS, BMDO, DLSA, DODIG, DEA, JMIC, and ARPA.

Table A-3. Total Reserve Component Officer Billets in OSD and in Small Defense Agencies and Other Activities, by Reserve Component, Organization, and Grade

Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Office of the Secretary of Defense								
ASD (C^3I)								
O-6	2	0	1	0	1	0	0	4
O-5	0	0	1	1	3	0	0	5
Subtotal	2	0	2	1	4	0	0	9
ASD (FM)								
O-5	2	0	0	0	1	0	0	3
O-4	1	0	0	0	1	0	0	2
Subtotal	3	0	0	0	2	0	0	5
ASD (HA)								
O-6	1	0	0	0	0	0	0	1
O-5	2	0	0	0	0	0	0	2
Subtotal	3	0	0	0	0	0	0	3
ASD (LA)								
O-5	0	1	0	1	0	0	0	2
Subtotal	0	1	0	1	0	0	0	2
ASD (RA) [a]								
O-6	8	5	9	4	3	6	1	36
O-5	4	2	3	4	2	0	0	15
O-4	2	0	1	0	1	0	0	4
Subtotal	14	7	13	8	6	6	1	55
NCESGR								
O-6	1	0	0	0	1	0	0	2
O-5	2	0	1	0	0	0	0	3
O-4	4	0	1	0	0	0	0	5
Subtotal	7	0	2	0	1	0	0	10
ASD (SO/LIC)								
O-6	8	0	1	0	0	0	0	9
O-5	3	0	2	0	0	0	0	5
O-4	1	0	1	0	1	0	0	3
Subtotal	12	0	4	0	1	0	0	17

[a] Includes RFPB.

Table A-3. Total Reserve Component Officer Billets in OSD and in Small Defense Agencies and Other Activities, by Reserve Component, Organization, and Grade (Continued)

Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
ASD (PA)								
O-5	1	1	0	0	0	1	0	3
O-4	0	0	0	0	1	0	0	1
Subtotal	1	1	0	0	1	1	0	4
Director, Net Assessment								
O-5	0	0	1	0	0	0	0	1
Subtotal	0	0	1	0	0	0	0	1
DUSD(PS)								
O-6	2	0	3	3	1	0	2	11
O-5	2	0	3	1	3	0	3	12
O-4	3	0	1	0	2	0	0	6
Subtotal	7	0	7	4	6	0	5	29
DUSD(ES)								
O-6	0	0	0	0	1	0	0	1
O-4	0	0	0	0	1	0	0	1
Subtotal	0	0	0	0	2	0	0	2
USD(P&R)								
O-6	0	0	1	0	2	0	0	3
O-5	4	2	3	1	0	2	0	12
O-4	0	0	1	0	0	0	0	1
Subtotal	4	2	5	1	2	2	0	16
Special ARNG Assignments[b]								
O-5	0	2	0	0	0	0	0	2
O-4	0	1	0	0	0	0	0	1
Subtotal	0	3	0	0	0	0	0	3
Total Office of Secretary of Defense	53	14	34	15	25	9	6	156
Small Defense Agencies and Other Activities								
DFAS								
O-6	3	0	3	0	2	2	0	10
O-5	9	0	5	0	4	2	0	20
O-4	11	0	2	0	4	0	0	17
Subtotal	23	0	10	0	10	4	0	47

[b] Special arrangement for ARNG officer positions that LMI cannot place in other OSD assignment categories.

Table A-3. Total Reserve Component Officer Billets in OSD and in Small Defense Agencies and Other Activities, by Reserve Component, Organization, and Grade (Continued)

Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
DISA								
O-5	0	0	0	0	5	0	0	5
O-4	0	0	0	0	7	0	0	7
Subtotal	0	0	0	0	12	0	0	12
POW/MIA								
O-5	0	0	2	0	1	0	0	3
O-4	4	0	4	0	1	0	0	9
Subtotal	4	0	6	0	2	0	0	12
AFIS								
O-6	2	0	0	0	1	0	0	3
O-4	4	0	0	0	1	0	0	5
Subtotal	6	0	0	0	2	0	0	8
BMDO								
O-5	1	0	0	0	0	0	0	1
O-4	1	0	0	0	0	0	0	1
Subtotal	2	0	0	0	0	0	0	2
DLSA								
O-5	1	0	0	0	0	0	0	1
Subtotal	1	0	0	0	0	0	0	1
DODIG								
O-6	9	0	0	2	0	0	0	11
O-5	1	0	0	0	0	0	0	1
O-4	2	0	0	0	0	0	0	2
Subtotal	12	0	0	2	0	0	0	14
DCA								
O-6	0	1	0	0	0	0	0	1
Subtotal	0	1	0	0	0	0	0	1
DEA								
O-6	0	1	0	0	0	0	0	1
Subtotal	0	1	0	0	0	0	0	1
JMIC								
O-5	0	1	0	0	0	0	0	1
Subtotal	0	1	0	0	0	0	0	1

Table A-3. Total Reserve Component Officer Billets in OSD and in Small Defense Agencies and Other Activities, by Reserve Component, Organization, and Grade (Continued)

Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
ARPA								
O-6	0	1	0	0	0	0	0	1
O-5	0	1	0	0	0	0	0	1
O-4	0	1	0	0	0	0	0	1
Subtotal	0	3	0	0	0	0	0	3
Total Small Defense Agencies and Other Activities	48	6	16	2	26	4	0	102

Table A-4. RC Officer Basic JPME Requirements, by Joint Organization, Reserve Component, and Grade

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Combatant Commands								
Atlantic Command								
O-6	12	1	13	2	7	1	0	36
O-5	36	1	26	14	23	0	0	100
O-4	37	0	18	10	26	0	0	91
Subtotal	85	2	57	26	56	1	0	227
Central Command								
O-6	3	0	0	2	2	0	0	7
O-5	13	0	9	4	9	1	0	36
O-4	25	0	11	16	24	0	0	76
Subtotal	41	0	20	22	35	1	0	119
European Command								
O-6	6	0	0	0	0	1	0	7
O-5	18	3	5	1	5	0	0	32
O-4	68	2	17	2	13	0	0	102
Subtotal	92	5	22	3	18	1	0	141
Pacific Command								
O-6	9	0	7	0	5	0	0	21
O-5	31	0	58	6	28	0	0	123
O-4	66	0	95	10	55	0	0	226
Subtotal	106	0	160	16	88	0	0	370
Southern Command								
O-6	1	0	0	0	1	0	0	2
O-5	8	1	3	1	5	0	0	18
O-4	34	1	14	4	22	0	0	75
Subtotal	43	2	17	5	28	0	0	95
Space Command								
O-6	0	0	3	0	0	2	0	5
O-5	5	0	10	0	23	0	0	38
O-4	5	0	13	9	26	0	0	53
Subtotal	10	0	26	9	49	2	0	96

Table A-4. RC Officer Basic JPME Requirements, by Joint Organization, Reserve Component, and Grade (Continued)

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Special Operations Command								
O-6	4	0	1	0	3	0	0	8
O-5	35	1	13	1	8	0	0	58
O-4	6	0	1	1	6	0	0	14
Subtotal	45	1	15	2	17	0	0	80
Strategic Command								
O-6	0	0	2	0	3	0	0	5
O-5	0	0	3	1	4	0	0	8
O-4	0	0	3	0	6	0	0	9
Subtotal	0	0	8	1	13	0	0	22
Transportation Command								
O-6	1	0	1	0	1	0	1	4
O-5	8	0	13	1	7	0	5	34
O-4	5	0	8	2	5	0	0	20
Subtotal	14	0	22	3	13	0	6	58
NATO								
O-6	0	1	0	0	0	0	0	1
O-5	0	0	1	0	0	0	0	1
O-4	1	0	3	0	4	0	0	8
Subtotal	1	1	4	0	4	0	0	10
Subtotal Combatant Commands	437	11	351	87	321	5	6	1,218
Office of the Joint Chiefs of Staff								
Joint Staff								
O-6	1	3	0	0	0	4	0	8
O-5	10	1	5	2	9	1	0	28
O-4	0	0	0	0	3	0	0	3
Subtotal	11	4	5	2	12	5	0	39
National Defense University								
O-6	1	1	1	0	1	0	0	4
O-5	1	0	1	1	0	0	0	3
O-4	0	0	0	0	0	0	0	0
Subtotal	2	1	2	1	1	0	0	7
Subtotal Office of Joint Chiefs of Staff	13	5	7	3	13	5	0	46

Table A-4. RC Officer Basic JPME Requirements, by Joint Organization, Reserve Component, and Grade (Continued)

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Office of the Secretary of Defense[a]								
O-6	11	5	8	2	2	6	1	35
O-5	5	3	6	4	4	1	0	23
O-4	2	0	0	0	0	0	0	2
Subtotal	18	8	14	6	6	7	1	60
Defense Agencies and Activities								
Small Defense Agencies and Other Activities[a]								
O-6	1	0	0	0	0	0	0	1
O-5	0	1	1	0	0	0	0	2
O-4	2	0	1	0	0	0	0	3
Subtotal	3	1	2	0	0	0	0	6
Defense Intelligence Agency								
O-6	5	0	7	2	5	0	0	19
O-5	81	0	45	14	42	0	0	182
O-4	136	0	121	27	94	0	0	378
Subtotal	222	0	173	43	141	0	0	579
Defense Logistics Agency								
O-6	5	0	7	0	0	0	0	12
O-5	5	0	5	0	11	0	0	21
O-4	4	0	4	0	7	0	0	15
Subtotal	14	0	16	0	18	0	0	48
Subtotal Defense Agencies and Activities	239	1	191	43	159	0	0	633
Totals by Grade								
O-6	60	11	50	8	30	14	2	175
O-5	256	11	204	50	178	3	5	707
O-4	391	3	309	81	291	0	0	1,075
Grand Total	707	25	563	139	499	17	7	1,957

[a] The information provided by Washington Headquarters Services and the National Guard Bureau for these joint organizations contained some data redundancy. As a result, we are not able to provide more detailed tables relating to officers requiring JPME.

Table A-5. Total RC Officer Advanced JPME Requirements, by Joint Organization, Reserve Component, and Grade

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Combatant Commands								
Atlantic Command								
O-6	12	1	13	1	6	1	0	34
O-5	32	1	23	14	20	0	0	90
O-4	31	0	10	6	20	0	0	67
Subtotal	75	2	46	21	46	1	0	191
Central Command								
O-6	2	0	0	2	1	0	0	5
O-5	9	0	5	4	7	1	0	26
O-4	19	0	11	12	20	0	0	62
Subtotal	30	0	16	18	28	1	0	93
European Command								
O-6	6	0	0	0	0	1	0	7
O-5	17	3	4	1	4	0	0	29
O-4	46	2	9	2	11	0	0	70
Subtotal	69	5	13	3	15	1	0	106
Pacific Command								
O-6	9	0	5	0	3	0	0	17
O-5	29	0	51	4	27	0	0	111
O-4	56	0	85	11	47	0	0	199
Subtotal	94	0	141	15	77	0	0	327
Southern Command								
O-6	1	0	0	0	0	0	0	1
O-5	3	1	1	2	4	0	0	11
O-4	18	1	7	1	7	0	0	34
Subtotal	22	2	8	3	11	0	0	46
Space Command								
O-6	0	0	3	0	0	2	0	5
O-5	4	0	9	0	15	0	0	28
O-4	3	0	5	3	22	0	0	33
Subtotal	7	0	17	3	37	2	0	66

Table A-5. RC Officer Advanced JPME Requirements, by Joint Organization, Reserve Component, and Grade (Continued)

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Special Operations Command								
O-6	4	0	1	1	2	0	0	8
O-5	30	1	11	1	6	0	0	49
O-4	4	0	1	0	1	0	0	6
Subtotal	38	1	13	2	9	0	0	63
Strategic Command								
O-6	0	0	2	0	1	0	0	3
O-5	0	0	4	0	2	0	0	6
O-4	0	0	0	0	4	0	0	4
Subtotal	0	0	6	0	7	0	0	13
Transportation Command								
O-6	1	0	1	0	1	0	1	4
O-5	8	0	13	1	8	0	5	35
O-4	4	0	6	2	5	0	0	17
Subtotal	13	0	20	3	14	0	6	56
NATO								
O-6	0	1	0	0	0	0	0	1
O-5	0	0	0	0	0	0	0	0
O-4	0	0	0	0	0	0	0	0
Subtotal	0	1	0	0	0	0	0	1
Subtotal Combatant Commands	348	11	280	68	244	5	6	962
Office of the Joint Chiefs of Staff								
Joint Staff								
O-6	0	4	0	0	0	4	0	8
O-5	9	1	4	2	6	1	0	23
O-4	0	0	0	0	3	0	0	3
Subtotal	9	5	4	2	9	5	0	34
National Defense University								
O-6	1	0	1	0	1	0	0	3
O-5	1	0	1	1	0	0	0	3
Subtotal	2	0	2	1	1	0	0	6

Table A-5. RC Officer Advanced JPME Requirements, by Joint Organization, Reserve Component, and Grade (Continued)

Joint Organization	USAR	ARNG	USNR	USMCR	USAFR	ANG	USCGR	Total
Subtotal Office of Joint Chiefs of Staff	11	5	6	3	10	5	0	40
Office of the Secretary of Defense[a]								
O-6	4	5	7	2	2	6	0	26
O-5	2	3	1	3	1	1	0	11
O-4	1	0	1	0	0	0	0	2
Subtotal	7	8	9	5	3	7	0	39
Defense Agencies and Activities								
Small Defense Agencies and Other Activities[a]								
O-6	1	0	0	0	0	0	0	1
O-5	0	1	1	0	0	0	0	2
O-4	0	0	1	0	0	0	0	1
Subtotal	1	1	2	0	0	0	0	4
Defense Intelligence Agency								
O-6	5	0	3	2	5	0	0	15
O-5	15	0	7	2	13	0	0	37
O-4	36	0	30	7	25	0	0	98
Subtotal	56	0	40	11	43	0	0	150
Defense Logistics Agency								
O-6	3	0	5	0	0	0	0	8
O-5	4	0	5	0	9	0	0	18
O-4	2	0	4	0	4	0	0	10
Subtotal	9	0	14	0	13	0	0	36
Subtotal Defense Agencies and Activities	66	1	56	11	56	0	0	190
Totals by Grade								
O-6	49	11	41	8	22	14	1	146
O-5	163	11	140	35	122	3	5	479
O-4	220	3	170	44	169	0	0	606
Grand Total	432	25	351	87	313	17	6	1,231

[a] The information provided by Washington Headquarters Services and the National Guard Bureau for these joint organizations contained some data redundancy. As a result, we are not able to provide more detailed tables relating to officers requiring JPME.

Appendix B
Principles of Joint and Combined Planning and Warfare Required for Basic JPME for Reserve Component Officers

Incumbents are required to comprehend *one or more* of these principles thoroughly:[1]

I. Principles of Joint and Combined Planning and Warfare

Areas of Knowledge: Tactics and Operations

A. Principles of combined arms operations

B. Joint perspectives in theater warfare

C. Theater strategy and plans, national military strategy, national security strategy and policy, and military operations and materiel

D. Joint force employment at the operational and tactical levels of war

II. Principles of Joint and Combined Planning and Warfare

Areas of Knowledge: National Military and Security Strategy

A. National military strategy as derived from national security strategy and policy

B. Theater-level strategy, campaign planning, and warfighting

C. Political, economic, social, and psychological dimensions of theater strategic environment

D. Development, application, and coordination of the instruments of national power

E. Resource components of national power and their integration into national security strategy

[1] Chairman of the Joint Chiefs of Staff Instruction CJCSI 1800.01, 1 March 1996, Appendices B, C, D, and E; Intermediate and Senior-Level Colleges; National War College; and Industrial College of the Armed Forces Learning Objectives, pp. C-B-1 through C-E-4.

III. Principles of Joint and Combined Planning and Warfare

Areas of Knowledge: National Military Capabilities and Command Structure

A. Capabilities and limitations of U.S. military forces

B. Organizational framework within which joint forces are employed

C. Purpose, roles, functions, and relationships of the National Command Authority, the National Security Council, the Chairman of the Joint Chiefs of Staff, combatant commanders, Service Chiefs, and Joint Force Commanders

D. How joint force command relationships support joint warfighting capabilities

E. Organization of the U.S. military for planning, execution, sustaining, and training for joint and multinational operations

IV. Principles of Joint and Combined Planning and Warfare

Areas of Knowledge: Service and Joint Doctrine

A. Relationship between Service doctrine and joint doctrine

B. Current joint doctrine

C. Factors influencing joint doctrine

D. Solutions to operational problems using current joint doctrine

V. Principles of Joint and Combined Planning and Warfare

Areas of Knowledge: Joint and Multinational Forces at the Operational Level of War

A. Considerations accompanying the employment of joint and multinational forces at the operational level of war

B. How to plan for employment of joint forces at the operational level of war

C. Application of the theory and principles of war at the operational level of war

D. Link between national objectives and supporting military objectives, and the importance of defined conflict termination

E. Relationship among strategic, operational, and tactical levels of war

VI. Principles of Joint and Combined Planning and Warfare

Areas of Knowledge: Joint Planning and Execution Processes

A. Relationship between national objectives and means availability through the framework provided by joint planning processes

B. Effect of time, coordination, policy changes, and political development on the planning processes

C. Command, control, communications, computers, and intelligence (C^4I) as applied at all levels of war

D. How national intelligence organizations support Joint Force Commanders

E. Fundamentals of campaign planning

F. Effect of Defense Planning Systems on Joint Operational Planning

VII. Principles of Joint and Combined Planning and Warfare

Areas of Knowledge: System Integration at the Operational Level of War and the Processes Supporting the 21st Century Battlefield

A. Relationship between the concepts of the Revolution in Military Affairs (RMA) and the Military Technological Revolution (MTR)

B. How command, control, communications, computers, intelligence, surveillance, and reconnaissance (C4ISR) systems apply at all levels of war

C. How joint and Service battlespace systems are integrated at the operational level of war

D. Opportunities and vulnerabilities created by increased reliance on technology throughout the range of military operations

Appendix C
Principles of Joint and Combined Planning and Warfare Required for Advanced JPME for Reserve Component Officers

Incumbents are required to apply *one or more* of these principles.[1]

I. Joint principles and lessons learned from past operations and campaigns in employing unified and joint forces throughout the range of military operations

II. Design and application of appropriate organizational and command relationships for joint and multinational task forces

III. Analysis of the role that effective command, control, communications, computers, and intelligence (C4I) plays in joint operational planning

IV. Analysis of the complexities of joint C4I systems that support U.S. military and multinational operations

V. Processes and principles of joint planning systems that affect unified, joint, and multinational operations

VI. Appropriate problem-solving techniques, using current joint planning technology, to accomplish concept, force, and support planning; transportation assessment; and wargaming

VII. Creation and briefing of campaign plans, joint operation plans, and operation orders

VIII. Demonstration of a thoroughly joint perspective and comprehension of the increased power available to commanders through joint efforts and teamwork

[1] Chairman of the Joint Chiefs of Staff Instruction CJCSI 1800.01, 1 March 1996, Appendix F to Enclosure C; Armed Forces Staff College Learning Objectives, pp. C-F-1 and C-F-2.

Appendix D
Duties and Responsibilities Associated with the RC Officer Position upon Mobilization

The questionnaire send to the joint organizations surveyed asked RC officer position supervisors to describe the types of duties and responsibilities associated with the billet upon mobilization. Specific questions asked for the primary focus, subject matter, and type of work associated with the billet.

I. Which statement best describes the issues or matters that make up the primary focus of the position identified?

   A. Issues or matters of any kind within the officer's own Military Department dealing with military operations or operational support.

   B. Issues or matters of any kind within the officer's own Military Department dealing with other than military operations or operational support.

   C. Issues or matters of any kind within or pertaining to two or more Military Departments, CINCs, or agencies dealing with military operations or operational support.

   D. Issues or matters of any kind within or pertaining to two or more Military Departments, CINCs, or agencies dealing with other than military operations or operational support.

II. Select the category that most closely identifies the subject matter of the work required of the position identified:

   A. Acquisition, procurement

   B. Command, control, and communications

   C. Community relations, historical issues, public affairs

   D. Computer systems

   E. Doctrine, mobilization, exercises, readiness, training

   F. Facilities planning, architectural development, construction management

G. Political-military affairs, psychological operations, civil affairs

H. Law, medicine, religion, fields related to medicine

I. Maintenance, supply, fuel management, munitions

J. Administration, manning, personnel, personal finance

K. Operational planning, targeting, weapons employment, combat engineering

L. Programming, budgeting, accounting

M. Reconnaissance, electronic warfare operations

N. Intelligence, security police, weather

O. Space operations, satellite control

P. Scientific analyses, research and development

Q. Transportation, traffic management

R. Other (please specify) _____

III. Select the category that most closely identifies the type of work required of the position identified:

A. Direct/lead

B. Plan/staff

C. Stand watch/shift

D. Administer

E. Provide professional support such as law or medicine

F. Provide technical/scientific advice

G. Provide Reserve/National Guard advice

H. Educate/train

I. Other (please specify) _____

IV. What portion of the position incumbent's time and effort should be spent in working with people from beyond your major command boundaries (for example, working with another—or several—Military Services, with other

Defense Agencies, with the staffs of other unified commands, with the Joint Staff (if outside the Joint Staff), with OSD (if outside OSD), with other federal departments or agencies, with elements of foreign governments or with the United Nations)?

A. Much—over 50 percent

B. Some—25 to 50 percent

C. Little—less than 25 percent

Appendix E

Report of the May 1997 Workshop

JPME WORKSHOP FOR RESERVE COMPONENT OFFICERS

19 - 20 May 1997

(Corrected 3 July 1997)

Session I

Administrative Remarks/Welcome

Bemis. RC has come a long way. Things have changed greatly since Desert Storm. Not counting RC in Bosnia, there are 3000 on A/D. During Desert Storm there were 39M RC mandays. Last year, not counting Bosnia, there were 14M RC mandays. Purpose here is to provide, to the extent possible, JPME to the RC. We are looking for ideas. We can't afford to give the RC the same full-time education given to the AC. How do we start this process? We need innovative ways to do this.

Dees. I echo Mr. Bemis' comments. There is tremendous value added from the RC. RC involvement is increasing. At the same time, QDR is starting to expose raw nerves. Joint Vision 2010 is one of the CJCS' top three priorities and is my baby; it includes rapid integration of RC into active force and cites the need for joint warriors. Education is the key for that. Since 1989, there has been a 56% increase of RC involvement with JPME. Distance learning offers great potential for RC education.

The J7 is retiring for health reasons. I will be involved in retirement today and tomorrow. Col McLean will be sitting in for me.

JPME requirements need to be articulated clearly. Justification for these requirements needs to be firm. We need to ensure Service buy-in and that services recognize the value added of this approach. One way that JS can influence service is through the JROC to grade the Services' POMs. Services can be encouraged to support RC JPME. Then we need to make sure that RC officers are properly utilized after JPME. The challenge is to look outside the present JPME paradigm.

This is a high-powered group. There is another technology group that is looking at distance learning , war-gaming, etc. We need to look at a tailored approach for the RC, and not just mirror the AD solution. Keep in mind there are resource constraints. I will be monitoring the proceedings of this workshop with Mr. Bemis and COL McLean.

Requirements for JPME Educated Officers—Pickett (see slides from presentation)

LMI Survey--Pickett

Discussion of the totals in the chart. Do they show needs cumulatively for JPME standard and enhanced education? Answer. Can't add percentages. Upper limit of RC officers needing JPME is about 50%.

Question about whether there was a potential for respondent bias to pad the requirements for RC JPME? Answer. Possible, but the survey was constructed to eliminate as much bias as possible.

Bemis. We know there are some number of RC billets that need JPME. What was surprising in the survey was that the hard numbers for JPME for RC are so low. There is a problem in the RC with fitting faces and spaces because of the voluntary nature of the RC IMA assignments, etc.

Question about the survey being about the person or position. Answer. Position.

Present JPME Practices and Why They Don't Work—Lieberman (see slides from presentation)

Comment. Keep in mind that there are courses available for RC. But we may need to encourage them to take these courses.

Comment. Where does acculturation come in within the survey? Answer. It was embedded in Question 15h in the LMI survey.

Bemis. Acculturation is important; e.g., in CAPSTONE courses, meeting with other GOs and getting briefings at CINC HQs is very important.

Comment. Acculturation is important at the one-star course the Naval War College teaches.

Comment. It is important for the RC officers to rub elbows with AD officers from their own and other Services.

Comment. Take opposing view. Acculturation can only result in resident course. Distance learning is fine but if you make it too hard, you won't get the numbers you want in the long run. It goes very slowly. Takes longer to develop relationships with distance learning.

Comment. Offered different perspective. There is a wealth of knowledge imparted though seminars. (One time a week for 50 weeks).

Bemis. We need to try to work some acculturation in.

Post Selection Education--Smith (see slides from presentation)

Comment. Training and education are different. Education is what we are doing in JPME.

Comment. There are only educators in this group.

Comment. View Graph Transparency 6. "Intermediate School Solution to Standard JPME." Disagree with second bullet: "Nice idea but not workable." Navy Non-Resident JPME course is a viable alternative.

Comment. Not sure that the Army has this problem or what the magnitude of the problem is. We need stats on the incumbents' qualifications.

Comment. Survey could be skewed because of the supervisor's military education.

Comment. In the best of all world, the supervisors used the J1's job description for the position being surveyed.

Comment. Don't think that is true. I think the CINCs are asking for RC JPME.

Comment. CINCs are asking for JPME qualified officers.

Comment. Most of the augmentees I know about are for J3.

Comment. Navy RC requirement is not laid out clearly.

Bemis. Selection process may be there for RC officers, but not sure. For example, the USAR IMA list just dropped from 12,000 to 6,000 for fiscal reasons. There had to be some method for doing that.

Comment. PFP increases requirements on an unscheduled basis. Peacekeeping??

Comment. Working with AD forces is training.

Comment. View Graph Transparency 7. All four weeks would be ACDUTRA.

Comment. Web base education is an alternative.

Comment. No matter what the method of delivery (R, Non-Resident, distance learning....) for the course, seats are allocated through some process.

Bemis. Unit and IMA officers can use ACDUTRA for JPME. May have to get a second two-week ACDUTRA.

Comment. Need to look at prerequisites for JPME, such as PME.

Pickett. We are dealing with education not training. Consider using the current system with modifications. What are the CINCs requirements? Further research is required.

Comment. Is it feasible to fill all positions with qualified RC officers?

Pickett. Maybe there are distribution and selection problems.

Comment. Note that JPME is not required for promotion to O4.

Comment. The education phasing issue for RC officers reduces the availability of volunteers.

Comment. Look at the operational module of Non-Resident courses to force-feed selectees. It would have to be tailored to make time required to complete course more manageable.

Comment. In the Army, it is difficult to sort out the embedded JPME modules in the intermediate level courses.

Comment. Modularized concept could apply to RC and AC, which might help get support from the Services.

Pickett. There are some risks of achieving this type of popularity. The AC could sign up, and there would be pressure to drive overall time down without consideration of all factors.

Comment. The best JSO is one who is steeped in his own service (i.e., fully qualified). But we should not set up something that will override service prerogatives in how they qualify their officers.

Comment. Need to focus on the requirement.

Comment. It is too late to redo the survey.

Comment. Survey tells me that 135 people need JPME.

Comment. CINCs will want RC officers with intermediate level education and JPME.

Comment. In my own case, I would have been ill prepared to go to a JSO job as a major.

Pickett. Perhaps one idea is to send more senior O4s to JSO-type jobs.

Comment. This is largely a voluntary process, so that is going to be a problem. (Navy is using a selection process.)

Officer PME Framework (Figure A-B-1 of OPMEP)

- Comment. First two columns are mushy. We need two years to make them firmer.
- Comment. If we can do the first two columns right, that will provide the foundation that will better support preparation of RC officers for JSO assignment.
- Comment. AF example is the Squadron Officers School open to O2s and O3s which will make them better prepared for JSO duty.
- Pickett. If we overlaid an RC version of this View Graph Transparency over the AC View Graph Transparency we would see the vertical lines moving to the right in time. The RC is 2 1/2 years behind the AC in educational attainment at O4 and O5.
- Comment. We should require the RC to complete education faster.
- Comment. Remember that these officers have another life. That gets into the retention issue.
- Bemis. There is no written requirement for AD promotion to O5, but there is a written requirement that RC officers must have completed half of their intermediate level school to be eligible for promotion to O5.
- Comment. CAS3 is required for O4s. But there is not a JPME requirement.
- Comment. We are "whistling Dixie" if we try to tell Services to compress education. Maybe the right answer is to offer an alternative. In the RC, the selection rate to O4 has gone down to 33% due to PME requirements.
- Comment. AF has placed eligibility restrictions on PME to avoid junior officers signing up for education that they can not utilize within a reasonable period of time.

Comment. What is our purpose here?

Pickett. Primary aim is to better prepare RC officers for duty in joint organizations, not to fix the education structure.

Bemis. How do you better performance? Use existing platform.

Comment. What are the CINCs asking for?

Comment. Non-Resident phase I is available for all now. Non-Resident phase II is not.

Comment. There is an accreditation problem. Suggest detaching Phase 1 from JPME standard. The MECC needs to look at this.

Comment. We need some degree of accreditation.

Comment. We have oversight of Phase 1 but not of the RC education.

Pickett. It is not Phase I, but a new animal.

Session II

Review of Standard JPME Requirements--Dial

View Graph Transparency 9. Bemis. TAR is subset of AGR.

View Graph Transparency 13. Comment. Correction. Majority of JPME is taught in the first five months while the RC officers are in CGSC.

View Graph Transparency 15. Comment. Correction. Time to complete Non-Resident course is 60 months and it is tied to promotion (USMC).

View Graph Transparency 16. Range in length of Non-Resident courses.

- Retirement points are a factor in how quickly an officer completes these courses. One does not want to waste retirement points in any one year by going over the 60 allowed.
- Bemis. The 60 limit has been changed to 75 per year.
- Comment. CGSC could take up to 36 months. It can be done faster.
- Comment. It is 22 months for the USMCR instead of 24 months.
- Comment. Completion is tied to promotion or choice of assignment

View Graph Transparency 18. Service factors - Army

- Comment. Reserve schools teach CAS^3. Army effort to send Reserve Instructors to Levenworth to teach the active course to qualify as instructors and return to teach reservists. They're trying to push through twenty people a year. Also trying to match the Non-Resident and the resident courses. The Non-Resident course is long because of the limited time available to RC officers. CAS^3 is great, but having CGSC 1.5 years later causes problems. CAS^3 is being moved earlier at the tail end of the advanced course. Where the Army is going? Distance learning plan for CAS^3 and reducing from 9 to 6 weeks.
- Bemis. Remember those officers in units still have their normal RC duties to perform.
- Comment. Keep aware of the CAS^3 model (as a critical component for reserve promotion), tailored so that RC can do the six weeks in 2 weeks and 8 weekends
- Comment. There is an instructor qualification process for RC instructors.

View Graph Transparency 19. Service factors - Navy

- Comment. Not aware of any officer who has completed the Naval War College Non-Resident course.
- Pickett. Navy Non-Resident course is very hard. However, course has been changed to reduce its bulk. Should expect an increase in enrollment.
- Comment. Third bullet should read: "Manning the fleet takes priority over education."
- Comment. Less than 400 junior officers per year go to Newport in residence.
- Pickett. The quality of Navy officers attending intermediate level courses at other services schools and colleges have improved markedly over the past several years. Several years ago when they did not send the best.

View Graph Transparency 21-22. Comment. I will argue with the ranking that Dial assigned to the Army--third. A significant number of Army AC officers attend Army Non-Resident course because only 50% of AD officers can attend residence courses. More time is allowed for RC to complete Non-Resident because time demands on RC are recognized.

View Graph Transparency 24 Conclusion.

- Comment. There are multiple competing requirements for reservists. How to incentivize JPME?

- Comment. The paradigm for RC JPME needs to be changed.
- Comment. RC officers should complete PME earlier.
- Comment. One way to fix this is to change the grade of RC billets (i.e., O4 billet to O5, an active major slot = reserve Lt.Col) to give them more time to complete PME and JPME.

- Comment. That may be a good idea.
- Bemis. It would create a problem with the AC grade structure of the supervisors with the RC officer being superior in rank.
- Comment. Maybe they should all be colonels. (Humor.)
  - Ballard. We need to find an incentive to get RC officers to complete education at right time. I like the way you have done this. It is just the facts.
  - Dial. System works but better for the AC than the RC.
  - Bemis. There may be multiple paths to achieve the objective. Acknowledge the unique talents of reservists (Haiti / banking example).
  - Ballard. The seminar idea has a lot of potential.
  - Pickett. There are disadvantages in some cases. In the AF seminar, students are the seminar leaders. In the Navy seminar, there is a faculty lead. RC officers serve as adjunct faculty.
  - Bronson. Technology (DL, video conferencing...) offers solutions.
  - Pisel. Discussion of WEB based learning, how and why. A problem with the seminar is that people are in different time zones. Need to think about a new paradigm of asynchronous (any time/ any place) learning. But, need to use cohorts to ensure more students finish. Individuals will tend to drop out at a higher rate.
  - Iowa University uses this approach. No courses, just 7 problems to solve over 24 months.
  - Reilley. AFSC is experimenting with the synchronous CyberSeminar right now.
  - Pisel. Discussed computer mediated instruction. Joint acculturation will take place in this environment.

Reserve Officer Operations Course Presentation—Gillespie, Naval War College

- Run three times a year. Six week reserve officer course, seminar based (a pull from existing curriculum).
- Reserve Officer Operations Course is in its 17th year.
- Focused on grades O4-O7.
- Using distance learning has been tested on the Carrier Carl Vinson.
- Comparison of courses.
  - Joint Military Operations. 220 hours.
  - Program of Joint Education/JLASS. Two trimester electives. 136 hours.
  - College of Continuing Education. Two year NRS program. ≅ 130 hours contact time.
  - Reserve Officer Operations Course. 6 weeks. 80 hours contact time per dept.

Bemis. What is the AGR participation? (Answer. A sprinkling). When this shows up on a Naval officers record, does it affect promotion? What's the incentive for a no accreditation, no certification course?

Bronson. Do you see this as being amenable to the other courses (portions of the College of Continuing Education program); could it be packaged for dissemination? (Answer. Yes).

Ballard. Reserve Officer Operations Course qualifies USMCR officers for O5. (C&S equivalent)

JPOC Presentation—Antis, AFSC

Ballard. Huge diversity and range of people who attend this course *and* there is a growing demand. There is no target audience. We get E1s through O8s.

Bemis. You said this is not a targeted course. Should it be a targeted course if the demand is so high as to encompass E1-O8? What is JPOC if anybody can be in?

Ballard. JPOC is comprehensive but *basic knowledge* level of PME. We are providing a service to the host organization. They determine the audience.

Bemis. You need to limit it.

Bronson. How does an organization request JPOC? What is your end-state level (expectation of comprehension) when you go out to a unit?

Antis. Some RC units make the JPOC mandatory attendance for the entire unit. At AC units, we normally spend 2 hours with the flag/general officers and then present the course to an audience consisting of O3-O5. The end-state is "oriented."

Gillespie. Could it be a foundation JPME course? (Answer. Yes).

ACSC Presentation on CSC Electronic Campus--Reilly

- Non-Resident program with 8,000 students.
- Book based program is being phased out. Cost: $48 per student.
- CD ROM program replacing book based program. Cost: $3.30 per student.
- A complaint is that the printing costs have been transferred down to the unit. New utility lets users select portion of document to print instead of having to print the entire document. This will help alleviate complaint. Texts over 20 pages are produced on paper for distribution to students.

Young. AWC is using similar thing in virtual seminars via video conferencing.

Pisel. A limitation is the need to consider what time zone the student is in. There is also a bandwidth issue.

Presentation on education attainments of Selected Reserve officers--Bemis

Reaction to Models--Dial

McLean. Are we concerned about the officers going to joint duty or the incumbent?

Gillespie. First, we need to find out what the target audience is? Second, determine what the "void" is (what it is that's broken/missing).

Ballard. Start with the 135 people identified in the LMI survey. Extrapolate on the board to generate a template you can modify.

Young. We need to look at the requirement on almost an individual basis.

Ballard. The current system of centralized planning and decentralized execution has worked fine. Let the Military Services work the issues raised by Young.

Pickett. What we are talking about is what education is required for each joint seat.

Gillespie. RC would say that the system is broken. What can we do? For example, the CINCs' comments need to be analyzed for educational requirements.

Ballard. Courses are pretty much similar. Once you have a good template, *Now* who do need to teach, what media, in what time frame.

Pickett. Ballard found that the UK is teaching a course like Reserve Officer Operations Course.

Pickett. There is a need for service competence. How does this fit in? How can CINC assure qualifications of RC officers? (Answer. He can't because it is a voluntary system. The joint organization does not select them).

Ballard. I like the idea of giving individuals incentives to complete PME or JPME.

Bronson. There is enough demand in the RC so that we don't need to ratchet up the incentives, e.g., Marine course. These are officers who know they need (and want) more than they're getting! We need to provide something more.

Young. There seems to be a mismatch between RC officers qualifications and joint billets for them. Greatest demand may be for C^3I officers but greatest supply may be in other officers. Can we determine the value of additional training? Need to focus in on requirements.

Ballard. The problem is to link joint education to joint utilization.

Bemis. There is a difference between the AC and the RC. We take a shotgun approach in the AC, that is, many AC officers get educated to provide a pool of officers to draw from. This can't be done in the RC, rifle shots are needed there.

Bemis. Not all are volunteers. If the CINC declines an RC nominee, he may not get anyone. We need to change CINCs and RC staffs to get better choices.

Pickett. Incentives will provide a larger pool of potential volunteers.

Bristow. Unqualified RC officers are going to joint assignments. CINC should want to have officers having intermediate level schooling and minimums. We have Army schools and courses to do that. We may be looking at a personnel management problem. The incentives question should be asked of the RC leadership. What incentives do you need to get better people? Also, CINCs should start raising standards by declining nominees.

Pickett. Is the U.S. Army going to permit reservists/ guardsman to fill O-4 slots with only minimal PME requirements? (Answer, Bristow. "Hell yes!").

Pickett. We failed to reach closure in this session.

Naval War College Courses	
Joint Military Operations	**Reserve Officer Operations Course**
approx=220 contact hours	6 wks/SP/NPSM/Joint Military Operations
1 15-20 Research Paper	80 hours contact time per dept.
2 3.5 hour written exam	1 read-ahead CES (Korea made simple)
3 CES problems	lecture (moderately intensive)
1 two week MRCWG (2 MRC + Dist)	1 small ILC (Caiman Is--DROGS Terrorism)
Program of Joint Education/JLASS	1 RC officer moderator
2 Trimester electives	
96 hours CT + 40 JLASS= 136 CT	No known charter.
1 paper	No directed curriculum
1 exam	Curriculum development on Joint Military Operations course
College of Continuing Education	
2 years NRS program	No paper
33 weeks each, S&P/ NSPM/ Joint Military Operations	No exam
	No OPORD/CP
approx=130 hours contact time	Little above K&C taxonomy
written exams/ research papers	
CES & WG experience	
(Quotas Lim Fac Faculty $ Positions)	

Session III

Presentation of perceptions on first day's discussions–McLean

- Heard sound bites regarding.
- Policy-identify the audience
- Tailored
- Targeted
- Models-JPOC and Naval War College
- Core competency-service qualifications.
- Survey
- Incentives
- Requirements
- JPME phasing-no requirement (disconnect from Phases I and II)
  - Need more research on requirements and end-state, and further investigate areas identified yesterday.
  - What's the objective: To improve the education of RC officers to operate in a joint environment.
  - Course content . . . . to achieve objective.
  - What is it that this course needs in content to ensure that RC officers will need to be successful in the joint environment? (challenge, "you are the curriculum experts!").
  - Maybe it is the Navy course, or another or a synthesis. The aim is not to achieve Phase I or II but to make them better able to support CINCs.
  - If we can't come to closure, then we need to articulate a path to take.

Bemis. I echo what Col. McLean said. This is not taken as criticism. We called this group together to help us focus; to see if policy can be changed to make the right thing to happen. Appreciate participation.

Gillespie. In the last couple of MECCs, the subject has been RC support to the CINCs. Some bullets and questions:

- A thought is that this is a personnel and not an education problem.
- There was a message (?) that directed a fix to the personnel problem.
- Recent briefing stated that there was a dramatic improvement after that.
- Education technology offers alternatives.
- Question. Is RC education policy defined?

Bronson. Depends. There is no RC JPME policy.

Gillespie. Policy for RC JPME is needed. Volunteerism and incentives can only go so far.

Bemis. This could have been done two years ago, but the means was not there. RC personnel and education comes from the same office.

McLean. OPMEP focuses on AC JPME. There is no CJCS oversight of RC education and I don't think the OPMEP is the way to do it.

McLean. We need help from a curriculum standpoint, but not being as strict.

Pisel. Don't agree. I think it is more a process problem. Content is not the problem.

Miller. Joint Vision 2010 (mentioned by BG Dees) could be the vehicle.

Bemis. Don't put into Phase I or II structure. Down the road, are we going to have an RC JSO specialty? The alternatives are one, to have a straight on document or two, to merge at some point.

Pisel. It will have to be a parallel policy.

Bemis. Probably don't want an RC JSO specialty. There are too many implications.

Review of Enhanced JPME -- Lieberman

There are platform issues (curriculum issues) and admin issues (who develops and administers these courses), and who's responsible for QA? (within or across the services?).

View Graph Transparency 6. "Current Practice."

Miller. There are only 10 RC officers in ICAF and 1 in the Naval War College.

Lieberman. Need to look at alternatives for increasing the number of RC seats at ICAF and Naval War College.

Selected Reserves education statistics--Bemis

- (Lots of discussion and disagreement)
- Gillespie. Noted that about 1 out of 5 (20%) have PME certification
- Bridgeman. IMA officers are masked in this chart.
- Bristow. Pointed out that there are 9700 qualified O4s and O5s in USAR and Army NG which are consistent numbers (driven by promotion rates) because of the high value.

Models for Consideration--Lieberman

Focused Studies at AFSC--Ballard

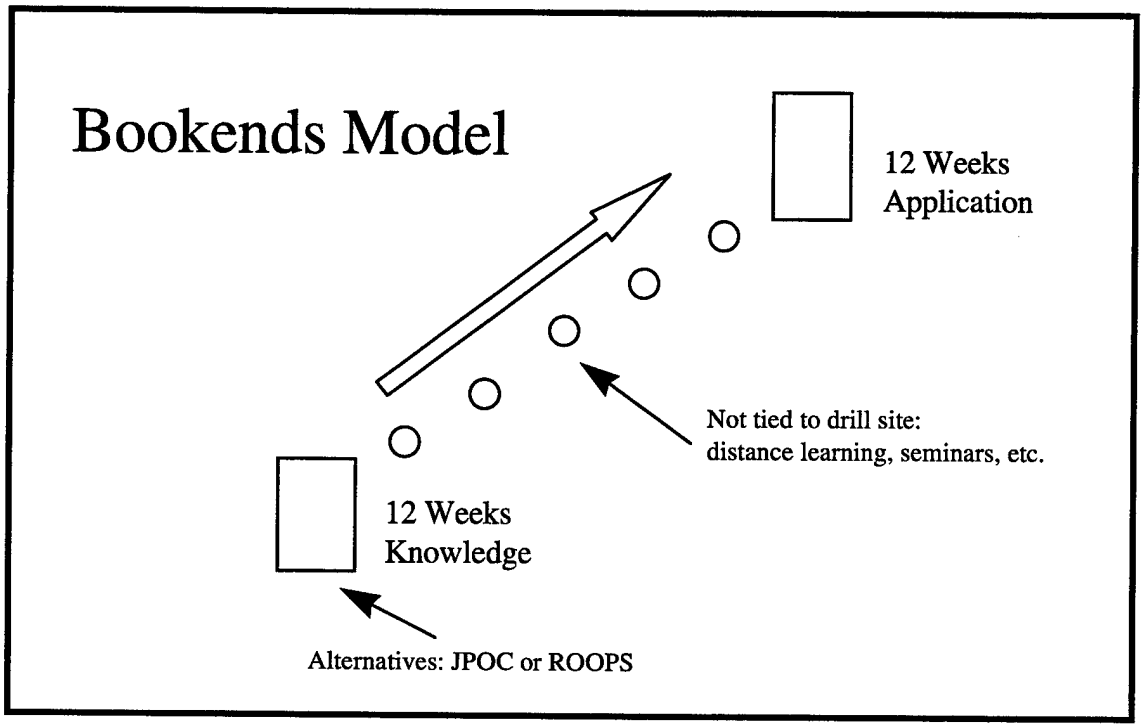
- Focused studies (electives!) refers to two 20 hour blocks in O4-O5 level course.
- They are not stand alone blocks.
- "Education is fundamentally different than training." Recommended Joint Pub 3.0 as a must for all Joint Doctrine Education. Discussed the *top end goal*: to get the RC officer to think like, act like, respond like an active, full time officer. RC deserves the same opportunities and quality of education.

Pickett. Any suggestion as to how to achieve joint acculturation?

AFSC Bookend Model--Ballard.

- 12 days ACDUTRA (2 weeks) plus 48 drills = 12 week JPOC
- Knowledge level vs. application level (manage the track)
- One of the top goals is building teams. Everyone should be capable of fully understanding component core competencies, and everyone should understand service capabilities and limitations with regard to component core competencies.

Bronson. Acculturation begins in sessions not tied to drills site



Alternatives (4 year vs. 3 year tour)				
	Year 1	**Year 2**	**Year 3**	**Year 4**
Alt 1	JPME	Utilization	Utilization	Utilization
Alt 2	JPME+ Utilization	JPME+ Utilization	JPME+ Utilization	NA

Ballard. Content appears to be firm. Options should be in the packaging and the process!

Revised RC National Security Course at NDU--Miller

- The two week RCNS course with some modification might be the avenue to provide enhanced JPME, or as an interim fix.
- All five elements of NDU contribute to RCNSC.
- RCNSC full time staff is 2 people. The course is for reservists, by reservists.
- Depends on services to provide students and staff (and depends on service $).
- Redundancy between standard and enhanced PME is crucial for RC officers.
- 500 officers per year. Probably none going to joint assignments
- LMI survey gives us data for RC requirements.
- RC officers at PACOM lacked knowledge about joint operations.
- Eventually need to add preparation for officers at JTF.
- The disconnect is the lack of a method to fit students to utilization

Ballard. This is a great course. It gives top level credit. Open to O4-O6. The incentive is that it qualifies you for O-6

Gillespie. The courses exist to meet the requirements however, you can't control the services sending the right bodies. No policy of assignment, requirement, and wasted $. It looks like a boondoggle.

Miller. Disagree. It helps non-joint officers understand how their organizations fit in.

Gillespie. The CINCs have requirements. RC officers having assignment to CINC should be selected for RCNSC.

Ballard. We have a generation gap here. It took a long time for the AC to understand Goldwater-Nichols. The RC is just starting to understand Goldwater-Nichols.

Reinero. There is a DoD directive for the AC. There is an RC Directive in draft patterned on the AC that will lay down the ground rules for RC officer management. It is to be published by the end of the year. It will be the Joint Officer Management for RC.

Miller. This meeting will be the subject of the next meeting of the RC Joint Officers Working Group.

Young. This is a great course that can service 500 but it is not tied in to assignment patterns, so it makes no sense. Don't want to see that it makes no sense on the front page of the Washington Post or NY Times.

Miller. That is unlikely. The QDR was only on page 17 of the Post.

Miller. This course could be done in two 2-week blocks to prepare RC officers to perform more effectively in joint assignments.

Reinero. This course is not designed to prepare officers for joint duty.

Miller. It is a micro-course of the Naval War College. Recommended AFSC Pub 1 for "under the pillow"; great for understanding joint doctrine. The Purple Book.

McLean. Joint doctrine, as it matures, is not in AFSC Pub 1. Who has academic oversight for RCNSC?

Miller. Academic oversight of this course is an issue that is being looked at. (Temporarily it's Col. Miller, who thinks it should be Col. Shaw).

McLean. How do you improve on this course? Is there a process to survey supervisors of graduates of this course? Are the graduates really grasping the intent of the course and applying it?

Miller. There is no process for assessing value to supervisor (because the utilization rate is so low).

Ballard. RCNSC is a strategic level course.

Bronson. Question re: JTF Tactical Support? (If actual ops requirements are joint; Reforger).

Discussion.

Lieberman. Who should develop and administer?

Ballard. The answer is obvious; NDU should develop and administer. Services are not equipped or able to do this for enhanced JPME. Not an increase in resources, but a scheduled, focused, better application of existing resources.

McCluny. DLAMPS is driving resources. DLAMPS is the program to educate federal civilian non-DoD managers at these schools.

McLean. We need to refocus on the context. Where to do this is beyond the purview of this group. We must restructure the current process and build a curriculum or develop a new one.

Comparison of alternatives--Lieberman.

Platforms	Prerequisites	Policy	Course Goals
RCNSC	Std JPME	Utilization	Application
Bookends (Ballard)	Service competency	Scope (JTF)	Acculturation

Question. When does acculturation occur? Congress has determined that it requires a 12 week course. (Why not at 9 weeks?)

Ballard. (Great agreement). Acculturation occurs in joint assignments that follow education. Goldwater-Nichols as the right process for acculturation.

Pisel. Argues with Congress' interpretation of acculturation requirement. Acculturation as a burden; as defined drives one to the conclusion that it can only be achieved in a long Non-Resident course or in residence.

McLean. We don't need to use "acculturation". Joint warfare is *Team* warfare. Working together is the first step in understanding each other. "Team building" process in the academic environment as a foundation for acculturation. In my experience, it took about 8 weeks at AFSC. There is no research to support the Congressional 12 week requirement. A joint assignment will help build team. Most critical thing was exercises.

Ballard. Agree. Two weeks is a building block to start building team week by week.

Briggs. Use "Introduction to Joint Team Building". Exercises act as a facilitator for team building.

Reinero. Different place and different time problems. Great concerns regarding logistical issues.

Pickett. Use distance learning, etc. to overcome.

Ballard. Process is already in place. It is proven. I also want RC officers in the resident course to add value.

Lieberman. Does anyone disagree that the bookend approach is a good approach? (Answer. No).

Bemis. I am not ready to commit that it's the right answer. I'll accept it as an alternative. First choice would be resident course, then second may be AFSC solution.

Young. Unless it's tied back to an assignment policy, any plan is useless. (What good is graduating 1000 folks with none going to joint assignments?)

Briggs/Gillespie. Need to tie resources to assignment policy.

Bemis. Unless the cost is zero or below...

Young/ Briggs/Gillespie. Argument that the billets exist, the moneys are already being spent, in an unfocused, ad hoc way. Not the right folks going to the right place.

Gillespie. How about an officer assignment requirements policy statement? Reserve education requirements definition, from the reservists.

Bristow. If the total number of RC joint billets is 4000 and the assignment is for three years, then you need to train about 1500 officers a year. Many of these may be in the pipeline already.

Young. If courses have to be added, they will have to be zero-summed with services. Incentives will have to be added to generate students for the new courses.

Bronson. Tweaking existing courses can be zero-sum.

McLean. If we use the present process, are we going to have to standardize?

Gillespie. I think the courses are very close at the present. But we need to coordinate this with the RC leadership.

Ballard. That should be easy to coordinate.

Gillespie. Aim was to follow OPMEP.

McLean. DoD RC personnel policy must be complementary with ROPMEP to solve issue.

Bemis. The MECC needs to have customer representatives.

Pickett. How does customer input come in?

Young. Described a process of direct and indirect input.

Pickett. Should there be a reserve MECC?

Bemis. The link to the RC is through J7.

McLean. MECC is Military Education Coordination Conference.

Bemis. Need to look at RC input model to MECC.

Session IV

Pickett. We need to determine the number of RC not qualified.

Hurdles and Challenges--Smith

View Graph Transparency 5. "Training programs do not exist to meet the need."

- Bristow. Objects to first bullet. Army Non-Resident course can provide the numbers in time.
- Ballard. Objects to second bullet. RC do have access to AFSC Phase II course.
- Bronson. "Can't get there from here" (sarcasm)
- Bemis. While Ballard is right at one level, from the individual RC officer's perspective, this may be true.
- McLean. Objects to third bullet. No new training program is needed.

View Graph Transparency 9. "Models for consideration-2"

- Ballard. Focused studies cannot be expanded and exported as stand alone course.

Bemis.

- Thanked all participants.
- Wants to reach consensus on conclusions (some things to agree on). What kinds of things do we need to try to do? When to creep in resource and personnel management issues? Do we want to put something on the street in a year, change it as we go...to get something better in place for reservists.
- Wants to determine actions for the future (LMI→plan→OSD)
- Be aware of resource implications.

Pisel. Sees three things: need to address personnel policy, education policy, and curriculum development.

McLean. We need to clearly delineate requirements, know the objectives, and who do we need to educate.

Pickett. We need to refine the survey data and get CINC requirements.

Young. Also, need to get RC incumbent's views.

Pisel. Need capabilities analysis for users--who has computers. (i.e. delivering a CD Rom based program)

Bemis. New questions are raised. How do you qualify an RC officer for joint duty before he has completed Phase I education? By using orientation or a refresher course (the knowledge level, such as JPOC) After Phase I education perhaps there is a need for a Phase I Plus course before joint duty assignment (the application level).

McLean. In my experience, Phase II was critical. Education is a readiness issue! In active, you cannot be a JSO nominee until you have completed both phases of JPME and are in a joint assignment.

Ballard. Is what they're getting at phase 1 sufficient to do the job? Will it fill the bill per the CINCs? Discussed broadening their minds (education) vs. filling their minds (training). (Answer, Briggs. Command should be responsible for training).

McCluny. Resources are there. It is just a matter of personnel management. However, Phase II issue is tough. Phase I requires policy changes. Need to focus on Phase II.

Reilley. Should be phased, especially in light of information systems and technology capability limitations.

Pickett. Should we be searching for the short term fix? (The 80% solution now vs. the 100% solution 3 years from now).

Ballard. Only a core 5-10% requirement for an enhanced, application level billet.

Bemis. The issue is going to be, should the AC and RC officers working side by side have the same joint qualifications.

Objective

To improve the joint education of RC officers to function in a joint environment

End state

Establish a career pattern and education process that will enable RC officers to better perform in a joint environment

Assumptions

- Enhanced ≠ Phase II
- Joint team building ≠ acculturation
- Develop a parallel joint education policy
- Service buy-in is essential

Action Items

- Define joint requirements
    - What are the capabilities shortfalls? (e.g. no PME, PME too late, inadequate PME)
    - Describe the shortfalls (Service, grade, specialty, scope of problem, etc.)
    - Match the incumbent capabilities with joint requirements?
    - Address how to resolve the differences above
- Identify user needs and capabilities (technology). Link to the MECC technology plan
- Complete RC Joint Management Directive (JMD) and ROPMEP development
    - JMD should include service education requirement
    - Timing of RC standard JPME
- Emphasize "joint team building" vice acculturation
- Address personnel management issues:
    - RC JPME nomination process (who gets enhanced education?)
    - Utilization and assignment (where are graduates assigned?)
    - Analysis of incumbents education/timing
- Address resource issues
    - Institutional implications
    - RC implications
- Implement CINC feedback process addressing adequacy of RC preparation for joint duty
- Develop transition plan for short term and long-range requirements

Possible Courses of Action

- Current standard JPME unchanged – Policy changes
- Current standard JPME modified
- A hybrid RC course to include standard and enhanced JPME
- Develop enhanced RC course that builds on the existing standard JPME
- Consider use of JPOC and RCNSC as part of the transition plan

Recommendation

Establish a steering committee and working groups consisting of OSD(RA), JCS, Service personnel and education experts, and RC leadership to address the above issues. Provide initial feedback to the MECC working group in October 1997.

McLean. Revisit policy issues to address reserve component education.

Bemis. Need to reallocate the resources we've got to do a better job. We will need to organize a joint task force with a steering group jointly appointed by Director of the Joint Staff and ASD(RA). Membership will come from OSD, JS, and service secretariats Working groups will be set up on Education and Resources.

Pickett. May fold into the MECC with an update or briefing.

Bemis. Can't wait till the MECC meets in the fall. All of the presenters should send papers to me on the models discussed here today.

Miller. Revised RCNSC will be considered as a candidate for the interim fix.

Appendix F

Report to the Steering Committee September 1997

Senior-Level Working Group on RC Advanced Joint PME

An Implementation Plan for Providing Advanced Joint PME for Reserve Component Officers

A Report to the Steering Committee on the Results of a Workshop Held on 22–23 September 1997

Contents

Chapter 1 Introduction 1-1

BACKGROUND 1-1

ROAD MAP 1-2

ORGANIZATION OF THE REPORT 1-2

Chapter 2 Curriculum and Structure 2-1

INTRODUCTION 2-1

STRUCTURE 2-2

Chapter 3 Implementation 3-1

INTRODUCTION 3-1

RESOURCES 3-1

COURSE POLICIES 3-4

STUDENT PERSONNEL ISSUES 3-5

Chapter 4 Management and Administration 4-1

INTRODUCTION 4-1

RESPONSIBILITIES 4-1

ADMINISTRATIVE ACTION 4-2

PERSONNEL MANAGEMENT 4-2

COORDINATION 4-3

VALIDATION 4-4

Chapter 5 Resource Support 5-1

PURPOSE 5-1

BACKGROUND 5-1

RESOURCE REQUIREMENTS 5-2

RESOURCE MANAGEMENT 5-5

Appendix A Steering Committee Memorandum Establishing Charter for Senior-Level Working Group

Appendix B Workshop on Advanced JPME for RC Officers Attendees

Appendix C Developing Cost Estimates

Appendix D Implementation Plan

Appendix E Abbreviations

FIGURES

Figure 2-1. Option A Structure 2-2
Figure 2-2. Option B Structure 2-4
Figure 2-3. Option C Structure 2-6
Figure 2-4. Proposed Model 2-7

TABLES

Table 3-1. Proposed Student Enrollment, by Fiscal Year 3-1

Chapter 1
Introduction

BACKGROUND

This report, submitted by the Senior-Level Working Group on Reserve Component (RC) Advanced Joint Professional Military Education (JPME), is the outcome of a 2-day workshop conducted 22–23 September 1997. The workshop was held pursuant to a 19 September 1997 memorandum (see Appendix A) from the Steering Committee on Reserve Component Advanced Joint Professional Military Education and was conducted in the conference spaces of the Logistics Management Institute (LMI) at 2000 Corporate Ridge, McLean, VA. The 26 participants (see Appendix B) represented all major interested parties–as well as LMI–in the ongoing initiative to provide RC officers with JPME beyond the level currently available at the services' intermediate and senior PME institutions.

The group met to develop ideas and concepts that had been under consideration by interested parties for several months. The objective of the workshop was to reach a consensus on methods and vehicles to accomplish the desired advanced JPME for RC officers. That objective has been achieved, and this report presents the working group's considered conclusions and recommendations to the steering committee.

During the workshop itself, participants were divided into four discussion groups whose subjects mirror the titles of Chapters 2 through 5 of this report. Meetings of the discussion groups, called subgroups in this report, alternated with plenary sessions throughout the workshop. This practice disseminated information and ensured each group's progress was somewhat synchronous with the progress of the others.

While important to the future operational capability of DoD's joint organizations, these are not easy issues upon which to agree. The discussions resulted in many compromises and, as may be imagined, issues requiring the commitment of resources, particularly in the months immediately before us, produced the most intense discussion. The members of the working group most affected by these resource claims, however, are eager for this initiative to succeed, and their support of the working group's conclusions and recommendations are deeply appreciated by their colleagues in the group.

ROAD MAP

This report is intended to provide the steering committee with information that leads from current conditions to a fully operational advanced JPME program for RC officers, to the extent that future conditions can be foreseen to some reasonable degree. This road map approach recommends actions to be taken, an office of primary responsibility (OPR) for each action, an accompanying time line for the action, and recommended coordination agencies, when appropriate. This general approach is followed in each of the chapters with a recapitulation in Appendix D.

ORGANIZATION OF THE REPORT

This report contains five chapters. This chapter consists of a brief background discussion followed by a description of the composition of the report itself. Chapter 2 is the foundation for the chapters that follow. It describes in general terms the curricular content of the program proposed, along with a recommendation for a specific, RC-oriented structure to allow optimum delivery of the curriculum chosen. Chapter 3 addresses the question of how to set this program on its course. Chapter 4 represents a longer view of the program being proposed and deals with governance and oversight issues, as well as administrative matters. Chapter 5 contains a suggested plan for providing the fiscal support needed to implement this instructional program, including the funding required for manpower purposes. Four appendixes to the report provide foundational information and supplementary detail. Of particular interest is Appendix D, which is a recapitulation of actions, OPRs, and time lines recommended in the report.

While the time constraints of a 2-day workshop make impossible the thorough development of any educational program as complex as this one, the working group was aided considerably by the preliminary and exploratory work performed over the preceding 4 months by DoD officials and contractor personnel interested in making this endeavor succeed. Of particular help were the experience and suggestions gained during a 19–20 May 1997 workshop on this same subject attended by institutional and other representatives from the PME community. Many of the concerns and challenges addressed by the working group in the session just concluded had been discussed in preliminary and helpful ways some 4 months earlier.

Chapter 2
Curriculum and Structure

INTRODUCTION

Because of the overriding importance of student availability and institutional capacity in this initiative, program structure is discussed before curricular content. The great majority of RC officers assigned to joint organizations cannot attend a 12-week resident program similar to the phase II course now being offered at the Armed Forces Staff College (AFSC). We must try to structure something that would achieve as much of the AFSC program as possible, while accommodating the drilling and active-duty training patterns of RC officers.

Three models of program structure were considered. These models were extensively debated, as were variations of the models. By the end of the first day's deliberations, we had agreed upon a single structure as best meeting the needs of the program.

Once an acceptable structure was identified, the challenge was to examine the curriculum at AFSC's phase II course for joint specialty officers, review the learning objectives of that course, and identify those learning outcomes that could be included within the agreed-upon structure. This task was accomplished during the second day of the workshop.

Because of the desire of the working group to facilitate the implementation of this program in the most realistic way, all structural options were discussed as real-time startup options, with actual proposed dates affixed to the planning models. This helped participants identify and debate actual constraints and advantages.

The discussion of institutional involvement—in this chapter and elsewhere—sometimes identifies elements of the National Defense University (NDU), such as AFSC and the headquarters organization of NDU, for the performance of specific roles in this developing program. The working group has done this for practical, advisory reasons. We do not desire in any way to challenge or otherwise interfere with the authority of NDU itself. The comments recorded here simply convey the collective knowledge of workshop participants of the present roles and operations of those segments identified. The NDU president has the authority to assign, redirect, or realign the internal operations of the institution, and we collectively acknowledge that authority.

This chapter first discusses the various models for RC JPME considered by the workshop, including the advantages and disadvantages of each, and describes the

resultant recommended structure. We then present a proposed curriculum to fit in this structure, along with the rationale for selecting this curriculum.

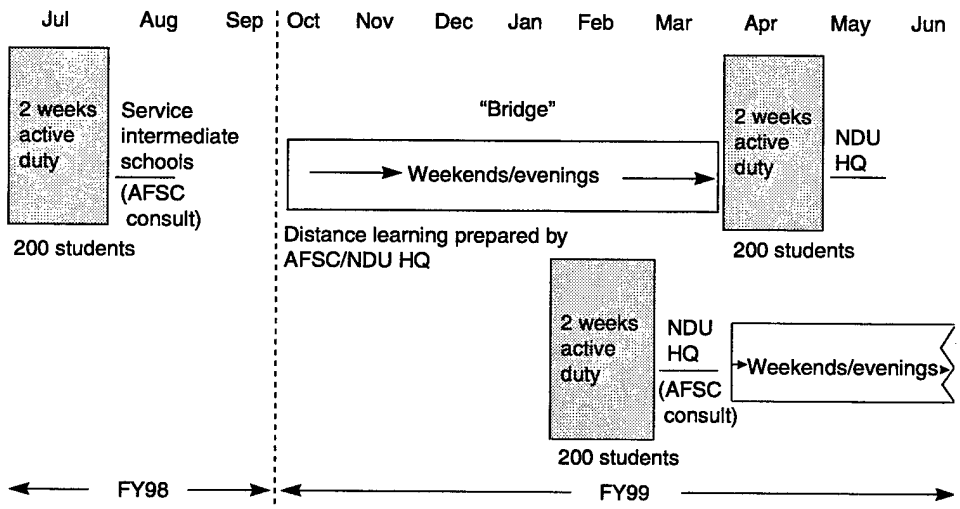
STRUCTURE

All three models presented to the workshop included a mix of resident and distance-learning segments. The idea was to utilize one or more of the reservists' 2-week annual active-duty training periods as a resident portion, complemented by a distance-learning portion to meet the objectives of the course. The three models are referred to as Options A, B, and C.

Option A

In this model, two periods of annual active-duty training are utilized in succeeding fiscal years, joined by a distance-learning segment between the two training periods. The two active-duty training periods, or resident sessions, are referred to as "bookends," and they are tied together by a single distance-learning "bridge." One bookend would precede the distance-learning period, and the second bookend would follow the distance-learning period. A schematic of this model is shown in Figure 2-1.

Figure 2-1. Option A Structure



As seen, RC officers would attend a 2-week resident session starting in July 1998. This would be conducted by the service PME schools—the intermediate (command and staff-level) schools in each service—with assistance from the AFSC staff for curriculum development. The distance-learning period would be developed and operated by AFSC, and would consist of various media

approaches, including the Internet, video-teleconferences (VTCs), CD-ROM self-paced instruction, and (perhaps) seminars.

The final 2-week resident session would be conducted at NDU headquarters with AFSC curriculum assistance. This program would utilize the resources and format of the current Reserve Components National Security Course (RCNSC), which would be adjusted to meet the needs of the advanced JPME curriculum.

ADVANTAGES

- Service intermediate PME schools already provide JPME at the phase I level. This mission could be a logical extension of their program.
- The Navy and Marine Corps currently provide 2-week RC joint operations courses annually. These courses could provide a platform for accommodating a new, first bookend resident session.
- AFSC, the leader in JPME phase II curriculum development, could provide consultative services for all segments of the proposed option.
- The current RCNSC is a 2-week active-duty session segment operated by NDU. This platform would be reengineered to provide the second active-duty resident segment of the proposed option.
- AFSC currently is developing distance-learning programs as part of their ongoing educational programs in JPME.
- Utilization of existing capabilities, both in the services and at AFSC, would provide a low-cost means of initiating the proposed program.

DISADVANTAGES

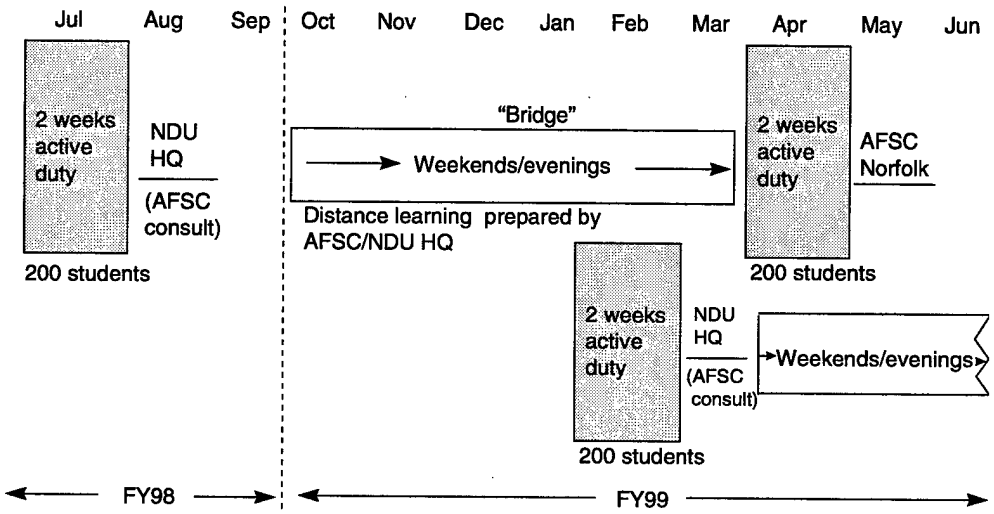
- It would be difficult for the services' intermediate PME schools to develop and deliver a coordinated JPME program at the advanced level since their current mission and capabilities are limited to JPME at the phase I level.
- This option requires two 2-week absences from each officer's parent unit over 2 fiscal years–absences taken in lieu of two annual training periods with his/her unit. This condition would create a considerable hardship on the parent unit.
- The Army and Air Force would need to create new 2-week resident courses for RC officers since they do not now offer programs similar to those of the College of Naval Warfare and the Marine Corps University.
- The RCNSC course operated by NDU is an auditorium- and lecture-based program that would not easily lend itself to a final resident phase of RC

JPME, in which joint exercises and war games are advisable to provide the integration and acculturation required.

Option B

The structure of this model is similar to that of Option A. Two periods of annual active-duty training are utilized in succeeding fiscal years, joined by a distance-learning segment between the two training periods. The two resident sections, or bookends, are tied together by a single distance-learning bridge. A schematic of this model is shown in Figure 2-2.

Figure 2-2. Option B Structure



As in Option A, the RC officer would attend a 2-week resident session starting in July 1998. However, this segment would be conducted by NDU at NDU headquarters, with AFSC curriculum assistance. This program would utilize the resources and format of the current RCNSC, which would be adjusted to meet the needs of the advanced JPME curriculum

As in Option A, the distance-learning period would be developed and operated by AFSC (with NDU headquarters help) and would consist of various media approaches, including the Internet, VTCs, CD-ROM self-paced instruction, and (perhaps) seminars.

The final 2-week resident session would be conducted by AFSC at the AFSC facilities in Norfolk.[1]

As presented, this option included a second cycle of classes, starting in February 1999, coincident with the current schedule of RCNSC, which provides two

[1] This education would be based largely on the final 2-week section of the current JPME phase II curriculum, which consists mostly of joint exercises and war games.

sessions each year at NDU. The RCNSC course is set for approximately 200 students at each session and cannot be easily increased in size.

ADVANTAGES

- Since the current RCNSC course at NDU is an auditorium- and lecture-based format, it lends itself easily to a reengineered introductory course involving initial integration and acculturation of the attendees. The change could be accomplished by July 1998.
- With AFSC conducting the final 2-week active-duty segment, it could draw on its expertise and curriculum from the current phase II program. AFSC could offer extensive joint exercise and war-gaming experience to students.
- One command, NDU, would manage and control the entire RC JPME educational program at the advanced level, as with the current phase II program. This would ensure better coordination and control and should further assist early implementation.

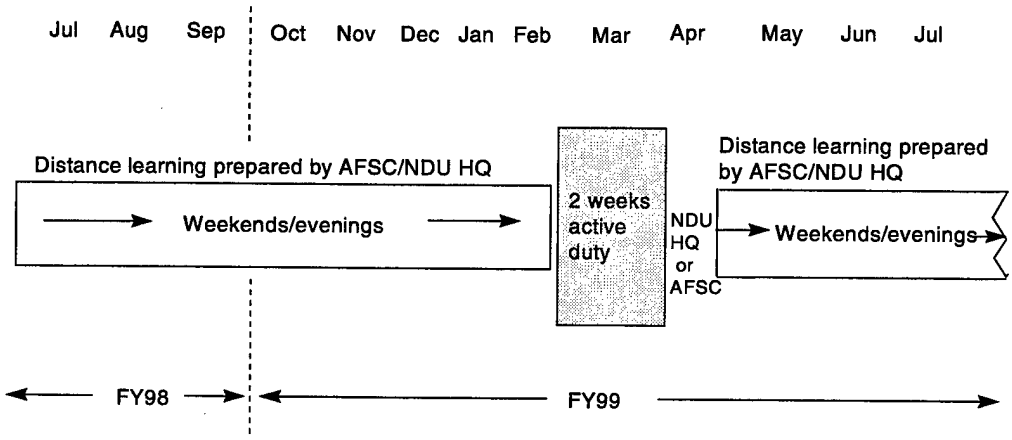
DISADVANTAGES

- Although RCNSC now enrolls 200 students at each of 2 sessions annually, AFSC could not accommodate that number as presented in the model. The suggested timing of the second cycle at AFSC would conflict with the present tight schedule of JPME, phase II, and could not easily be accommodated.
- This option requires two 2-week absences from each officer's parent unit over 2 fiscal years–absences taken in lieu of two annual training periods with his/her unit. This condition would create a considerable hardship on the parent unit.

Option C

This model provides a single 2-week period of annual active-duty training, preceded by a distance-learning segment and followed by a second distance-learning segment. A schematic of this model is shown in Figure 2-3.

Figure 2-3. Option C Structure



As in the other options, the distance-learning segments would be developed and operated by AFSC with NDU headquarters help and would consist of various media approaches, including the Internet, VTCs, CD-ROM self-paced instruction, and (perhaps) seminars.

The single 2-week active-duty resident segment would be conducted either at NDU headquarters or at the AFSC facility. If held at NDU with AFSC curriculum assistance, it would utilize the resources of the current RCNSC. It would be reengineered as much as possible in order to meet the needs of the advanced JPME curriculum for RC officers.

Alternatively, if the active-duty segment were held at AFSC, it would be a new course, based primarily on the last 2-week section of the current JPME phase II course.

ADVANTAGES

- This option would have the smallest impact on other annual active training requirements since it would require only one active-duty segment between two distance-learning segments.
- As in Option B, it would be under the control of one command, NDU, which would manage and control the entire RC JPME educational program at the advanced level. This would ensure better coordination and control and should further assist in early implementation.
- With AFSC conducting the 2-week active-duty segment, it could draw on its expertise and curriculum from the current JPME phase II program. AFSC could offer extensive joint exercise and war-gaming experience to students.

DISADVANTAGES

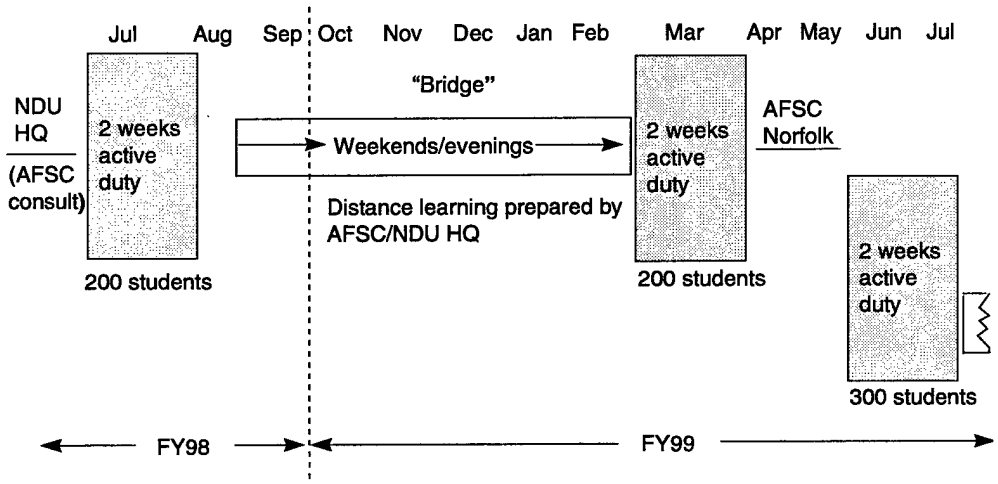
- There was significant concern that a single 2-week active-duty segment provided insufficient face-to-face time to accomplish the learning objectives sought by RC officers. The exercise and war-gaming capability of AFSC was deemed essential to providing the necessary education at the application level for RC officers and provided for their acculturation into the joint environment. Moreover, with only a distance-learning experience to precede the residence portion of the program, insufficient learning would have occurred to ensure successful war game outcomes.

- There was strong feeling that a distance-learning segment might not provide participants with the necessary motivation and sense of mission required to complete this arduous curriculum successfully. All students need to start together in a structured program that provides an early opportunity for the participants to work together.

Selected Model

After lengthy discussions of the three options, as well as variations of each, we determined that a variant of Option B most closely meets the conditions set forth by the steering committee. In addition, the working group believes that this structural choice provides an optimum solution to the major conflicting challenges: need for additional education, reasonable officer availability, and institutional capacity. Figure 2–4 is a schematic portrayal of the group's choice of program structure.

Figure 2-4. Proposed Model



Option C was discarded as not providing for sufficient JPME at the application level and for allowing for insufficient integration and acculturation of the students.

Option A was discarded because of the difficulties inherent in creating new programs in the Army and Air Force for RC officers.

A variant of Option B was accepted as the most viable model, with a single complete cycle during the first 2 fiscal years. The first cycle will accommodate 200 students, building to 300 students in the second cycle.

IMPORTANT CHARACTERISTICS OF THE OPTION CHOSEN

- The program can be started soon and easily by reengineering the RCNSC course at NDU with AFSC support.
- It can be easily scheduled because the RCNSC course is already planned for July 1998. The second resident session will fit into a current gap in the AFSC educational schedule.
- The entire program will be under the control of NDU. It may not be necessary to ask any of the military services or intermediate schools to participate in the program's implementation.
- This is a relatively low-cost alternative, utilizing existing course work to a large extent, piggybacking on AFSC's distance-learning initiatives, and starting small with future growth possibilities.
- It will provide a relatively quick beginning to a program that will offer RC officers access to JPME at the application level, an opportunity which is now practically nonexistent.
- This option mirrors the active component JPME process, with the military services responsible for providing basic (phase I equivalent) JPME and NDU providing advanced (phase II equivalent) JPME.
- The final 2-week active-duty period will emphasize joint exercises and war games, thereby facilitating joint acculturation, a prime objective of JPME at the application level.

The working group recommends that the proposed option (Figure 2-4) become the structure for initiating RC JPME at the advanced level.

Curriculum

On the second day of the workshop, focus shifted to the specific curriculum required to provide RC officers with JPME at the advanced (application) level.[2] From the outset of the discussion, the working group intended that RC officers be provided with JPME at an advanced level. With this objective in mind, instructional topics from the course taught at the Joint and Combined Staff Officer School at AFSC were used as the basis of developing the RC officer program.

Individual syllabus topics were examined and arranged in priority order. The highest priority topics were allocated to that segment of the program that offers the best opportunity for achieving the corresponding learning objectives. Working through the topics in this order resulted in the following arrangement of topics:

FIRST RESIDENT SESSION, OR BOOKEND—INSTRUCTIONAL TOPICS RECOMMENDED FOR CONSIDERATION

- Orientation
- Introduction to Joint Issues/Perspectives
- Joint Doctrine
- Orientation Exercises
- National Command and Control
- National Command Authority, President, Joint Chiefs of Staff, Secretary of Defense, Congress
- National Security Strategy and National Military Strategy
- Regional Perspective, Commanders-in-Chief (CINCs)
- Service and RC Capabilities
- RC Relationships with Active Component
- RC Mobilization
- Preliminary Joint Exercise

[2] The arrangement of instructional topics recommended for consideration in this section represents the best thinking of interested and experienced participants in an abbreviated workshop. We leave for the professional curriculum developers of NDU the final task of allocating time, subject, and instructional medium in optimum ways to achieve the educational goals of this program in the best interests of the officer students.

- Synchronization Effort
- Campaign Plan
- CINC Staff
- Introduction to Distance-Learning
- After-Action Review

DISTANCE-LEARNING SEGMENT—INSTRUCTIONAL TOPICS RECOMMENDED FOR CONSIDERATION

Topic	*Suggested Medium*
Joint Doctrine/Joint Warfighting	Self-paced/CD-ROM
Regional Issues	Seminar
Unified Command Plan	Self-paced/CD-ROM
Force Apportionment	Seminar
Joint Strategic Capabilities Plan	Group project
Joint Vision 2010	Self-paced/CD-ROM
Mobilization Policies/Integration	Self-paced/CD-ROM
Regional Contingency Plan	Seminar group project
Current Issues	VTC-supported briefings/ Self-paced

SECOND RESIDENT SESSION, OR BOOKEND—INSTRUCTIONAL TOPICS RECOMMENDED FOR CONSIDERATION

- Orientation Exercise
- Emerging Crisis
- Issues of Joint Operation
- Joint C^4 Integration
- Multinational Issues
- Joint Task Force Operation

- Concept of Future Joint Operations
- Introduction to Joint Issues/Perspectives
- Crisis Action Exercise
- War Gaming/Simulation

The working group recommends that the listed RC Advanced JPME curriculum content and arrangement be proposed by the steering group to NDU for their consideration.

Chapter 3
Implementation

INTRODUCTION

During the workshop, a separate implementation subgroup met to discuss the actions that must be taken and the policies that must be instituted before an advanced JPME course can be established. That group considered issues in three areas: resources, course policies, and student personnel issues. The issues discussed are presented below along with the actions required, OPR, and schedule. They are grouped according to the three areas.

The working group has reviewed and endorses the report of its implementation subgroup. Where adjustment or compromise has been found necessary, it has been written into this chapter.

RESOURCES

Issue 1—Enrollments

Table 3-1 shows the time-phased size of each bookend and the bridge. The first resident session begins in July 1998, the distance-learning segment immediately thereafter, and the second resident session in March 1999. The intent is that a student would attend one bookend per training year using annual training funds.

Table 3-1. Proposed Student Enrollment by Fiscal Year

Fiscal year	Left bookend	Bridge	Right bookend
FY98	200	200	0 (begins in FY 99)
FY99	300	300	200
FY00	300	300	300
FY01	300	300	300[a]
FY02	300	300	300

[a] This year could possibly see the breakout of the class attending the right bookend into three 100-student sections.

Steady-state throughput is considered to be 300 students entering each fiscal year after FY98 and completing the following fiscal year.[1]

NDU/AFSC is considering splitting the second bookend into three sections beginning in FY01. These sections would be integrated with the last 2 weeks of each resident phase II course.

ACTION: None required

Issue 2—AFSC's Need for Four Officers to Work As Curriculum Designers and Teachers

Without four additional curriculum designers, AFSC cannot proceed with this initiative.

AFSC must have four full-time curriculum developers now to design the curriculum for the bridge and the second bookend. The long-range plan is that they will use Active Guard/Reserve (AGR) officers from each service, who will also teach some of the courses. A proposed interim solution is to use active-duty support workdays. Several qualified individuals have been identified by NDU, but no positions are presently available for them. These individuals must begin designing the curriculum about 1 year in advance of instruction, which means they are already behind schedule for designing the bridge portion of the curriculum.

A proposed interim solution is to put the curriculum designers on consecutive 179-day Active-Duty for Special Work (ADSW) tours. Participants agreed that the ADSW tours should be workable until the permanent billets can be identified.

ACTION: Identify funding for ADSW tours to develop the curriculum at AFSC. Select and order qualified officers to perform the duty.

OPR: Reserve Components

TIME LINE: Immediate

ACTION: Identify four billets for AGR/TAR[2] curriculum designers. Assign qualified officers to those positions.

OPR: Reserve Components

TIME LINE: 1 October 1998

---

[1] The working group discussed, at some length, the issue of how to plan for the inevitable attrition of students. We were unable to reach a consensus, and this report therefore portrays all classes as having no attrition, an unrealistic condition.

[2] TAR: The USNR continues to use this acronym (for Training and Administration of the Reserves), although the official designation, to be used by all RCs, is now AGR.

Issue 3—AFSC's Need for 20 Reserve Component Faculty Members

AFSC does not now have the staff necessary to support this initiative over the long term. By March 1999 the institution will need 20 additional part-time faculty members to teach the second bookend periodically and otherwise administer the AFSC part of the program. It would be best if these officers were part of a special Individual Mobilization Augmentee (IMA) unit assigned to AFSC for this purpose. Representation from all services is desirable so that the faculty itself will be truly joint, thereby providing the students an additional dimension to the acculturation process.[3] In the short term (FY98 and possibly FY99), however, this arrangement may not be feasible. Three interim solutions to the problem are proposed for consideration:

- Twenty RC officers for 19 days active-duty in March 1999
- Funding to hire temporary civilian contract instructors
- Temporary duty (TDY) instructors from the service intermediate and senior schools, with the schools funding the TDY.

Since AFSC cannot teach advanced JPME to RC officers in the long term without the new staff members, the requirement should have the highest planning priority. Since the deadline for meeting the requirement is March 1999, however, there is a little time to accomplish the preparation necessary.

ACTION: Obtain temporary faculty members using one of the alternatives described (short-range solution).

OPR: Steering committee and Reserve Components

TIME LINE: Immediate

ACTION: Oversee the establishment of a joint IMA reserve unit of 20 officers at AFSC to provide faculty for the program (long-range solution).

OPR: Office of the Assistant Secretary of Defense (Reserve Affairs)

Issue 4—Additional Costs That Have Not Been Specified

AFSC anticipates some additional costs in the following areas:

- Hardware to support distance-learning activities
- Resources to operate a World Wide Web site
- Reproduction—paper and CDs

[3] For planning purposes, the working group suggests that the makeup of this faculty augmentation group be USAR7, USNR6, USMCR1, and USAFR6.

- Distribution (postage)
- Off-campus, leased facilities, when required.

NDU already incurs limited costs of these types in running the RCNSC.

ACTION: Identify additional costs associated with this course.

OPR: National Defense University

TIME LINE: Must be identified for FY99 and subsequent budgets

COURSE POLICIES

Issue 1—Can an Officer Attend the First Bookend Only?

The two resident sessions and the bridge will be considered one course. Enrollment in the first bookend constitutes enrollment in the entire course. The student does not graduate until he/she has completed all phases. It will not be possible to enroll in one part only. This is the model used by the Army War College for its nonresident course.

ACTION: None

Issue 2—Will the Bridge Be Accomplished in a Paid Status?

The bridge, the nonresident course, will be accomplished for retirement points only. Drilling reservists will not be entitled to use drill time to complete the nonresident portion of the course. This may partially alleviate the concern about the reservist being "lost" to the joint commander for 2 years. This issue is covered in greater detail in the discussion of the tour length policy.

ACTION: None

Issue 3—Will Successful Completion of Phase I JPME Be a Prerequisite for This Course?

Yes. There was much discussion about how to handle Naval and Marine Corps Reserve officers who will not arrive from a large pool of qualified officers (intermediate service school graduates). In the case of the Navy, there are no known plans to create such a pool. Phase I is important, and RC officers must be required or strongly encouraged to complete it. The Joint Staff will oversee this advanced program, and will see that the effort maintains the high standards needed to ensure excellent performance of duty in the joint environment. The existing differences in service cultures regarding PME, however, coupled with the lack of time available for additional active-duty by RC officers, present daunting challenges to those officials charged with reviewing a demanding educational program while maintaining reasonable equity among the RCs and their officers.

ACTION: Develop admission policies that maintain appropriately high standards while recognizing the differences in the service's PME cultures, to the end that participating RC officers are treated equitably.

OPR: Office of the Assistant Secretary of Defense (Reserve Affairs)

TIME LINE: The rules must be established in time to process admissions applications for the July 1998 bookend

STUDENT PERSONNEL ISSUES

Issue 1—Will Attendance at the Course Depend on Assignment to a Certain Type of Billet?

Probably not, at least at the outset of the program (see issue 2). Considerable discussion within the working group led us to emphasize the importance of nominating RC officers of high quality to positions in joint organizations. Each command will know the number of advanced JPME RC officer billets within that organization. Negotiation between the joint organization and the RC should result in the assignment of high-quality officers who have attended—or who will attend—the proposed advanced JPME program. The commanders will likely use incoming RC officers flexibly, as they have in the past.

ACTION: None required

Issue 2—How Will Students Be Selected?

The RCs, with recommendations originating in the joint organizations, will have to identify the students to NDU for the first course about 60 days prior to the start of the first resident session. We identified three types of students who are likely to attend during the first iteration of the program:

- Officers who currently occupy billets in joint organizations
- Officers who have been selected/identified to occupy billets in joint organizations
- Officers who are bright and promising and are likely to occupy such billets in the future.

ACTION: Identify officers to attend first and subsequent Advanced RC JPME courses.

OPR: Reserve Components, in conjunction with joint organizations

TIME LINE: Identification process must include notification of NDU 60 days prior to first class in July1998

Issue 3—How Will We Keep Records of Completers?

The working group believes that we need a method to track officers who complete this course. It could be an additional data field, a skill identifier, or some other method. We must be able to locate officers who have this qualification, whether for mobilization or assignment to a position.

ACTION: Develop and implement a method to identify and track completers.

OPR: Office of the Assistant Secretary of Defense (Reserve Affairs), Reserve Components

TIME LINE: Method must be established by Mar1999 when first class completes the second bookend and the course

Issue 4—Is a Minimum Length of Assignment Policy Needed?

Great concern was voiced over the joint organization's loss of an officer for two annual training periods, especially if the officer is assigned to the joint organization for only 3 years. We discussed several ways to alleviate this problem, including a policy that the annual training for the first bookend would be completed while the officer was still assigned to his/her previous organization. This policy is probably not viable since the previous commander might have other needs and be unwilling to send the officer to a school that brings no benefit to that unit.[4]

We also discussed the use of funding other than annual training but realized that in the current budget climate, other funds cannot be assumed to exist in the future. We agreed that a 4-year tour policy would enable joint commanders to send the officer to school for two annual training periods, in 2 years, and still have two more annual training periods to utilize the officer. This policy, while not perfect, might offset some concerns about utilization of RC officers.

ACTION: Establish 4-year tour as the standard for all services for RC officers assigned to joint organizations.

OPR: Office of the Assistant Secretary of Defense (Reserve Affairs)

TIME LINE: None, but could be a selling point to commanders of joint organizations

[4] These conditions generally pertain to officers assigned to a pay billet in a commissioned RC unit. Officers who are IMAs or are members of the Individual Ready Reserve who consider applying for a joint assignment might experience less difficulty with the first bookend.

Chapter 4
Management and Administration

INTRODUCTION

This chapter deals with issues of management and administration that will permit the proposed JPME program to approach and reach a steady-state, successful operation without serious impediment or difficulty. The chapter is divided into five sections: Responsibilities, Administrative Action, Personnel Management, Coordination, and Validation. Actions recommended to support the establishment and operation of the proposed JPME program are shown in italics.

RESPONSIBILITIES

Steering committee. In our judgment, the steering committee has the responsibility to nurture and support this initiative, particularly through its formative early stages. The working group stands ready to act further as the action agent of the committee. As the program approaches maturity, however, we see a diminished need for steering committee oversight.

Office of the Assistant Secretary of Defense (Reserve Affairs) (OASD[RA]). This office, along with that of the Director, Joint Staff, is the principal policymaking organ of all the agencies involved in establishing a successful JPME program for RC officers. *We recommend that OASD(RA) publish by January 1998 a DoD directive establishing this program.*

RCs. These Components will provide the officer-students for JPME and will supply some of the officers needed to develop and operate the educational program. In the context of this initiative, the RCs are responsible for managing the assignments of all their officers, screening and selecting officers for assignment to joint organizations, and providing much of the funding and administrative support necessary to provide appropriate training and education. In addition, since this effort will require special actions involving RC officers needed for curricular and other program planning, the RCs will need to provide the officers required.

NDU. This educational institution will execute the program, at least initially. The institution has responsibility for curriculum design and for program structure and execution. Those portions of this document endorsed by the steering committee will provide some guidance, as will the advanced JPME experience of the staff of one of NDU's member institutions, the AFSC. But the final responsibility for the program rests with NDU. *We recommend that the steering committee, in the fall*

of 1997, recommend to the Director, Joint Staff, that NDU execute the educational mission embodied in this initiative.

Joint Staff. The Joint Staff has the responsibility for developing and overseeing the execution of policy on JPME matters on behalf of the Chairman of the Joint Chiefs of Staff. In this position, the staff has responsibility for curriculum oversight and program review of the education embodied in this initiative.

The responsibilities discussed in this chapter are not all-inclusive. They represent those that we feel are important and particularly relevant at this stage of development of the program envisioned by the working group.

ADMINISTRATIVE ACTION

As envisioned by the working group, the steering committee will play an important role in establishing and overseeing the start of this JPME program. As the program becomes more mature, however, we anticipate a logical transition to more normal administrative structures and practices. This will be particularly true as the program reaches a steady-state throughput of RC officers identified to participate in JPME.

As the steering committee anticipates the launching of the JPME educational program, there is one administrative action that needs to be taken to set in motion the process of identifying the joint organization billets whose incumbents need this advanced JPME. *We recommend that OASD(RA) distribute to all joint organizations except the Defense Intelligence Agency (DIA) and the Defense Logistics Agency (DLA)*[1] *the number of advanced JPME requirements appropriate for each organization. This should be accomplished by the end of November 1997.* The contractor (LMI) that computed the overall education requirements for this JPME is now completing a master table of RC officer billets, by organization, by Component, and by grade, whose incumbents need the advanced education. That information will be provided to OASD(RA) in October 1997.

PERSONNEL MANAGEMENT

In some respects, the demands of this new initiative upon the management of RC officer personnel will produce the greatest challenge of any that follows the establishment of the program. The very requirement to educate some of the 4,400 RC officers in joint organizations at an advanced level of JPME beyond that available at the services' command and staff schools will result in some need to manage centrally those officers who have completed this education. While the RCs have no intention of producing a formal pool of joint specialty officers like their

[1] The analysis by LMI of educational requirements associated with RC officer positions in these two organizations is not yet complete. These requirements should be identified by the end of 1997.

colleagues in the active forces, successful execution of this initiative will inevitably result in quantities of officer records that should be flagged and used by personnel managers to identify officers with high potential for second or third joint assignments.

Given the disparity in PME participation cultures across the RCs, a first order concern of the working group is the proper qualifications and prerequisites for officers entering this advanced JPME program. We note that an already-chartered task force coordinated by OASD(RA) is dealing with this difficult issue. The working group suggests that this issue be addressed as directly as possible in the previously discussed DoD directive.

Another difficult question for personnel managers is that of formal recognition for course and tour completion. At the present time, there seems to be no truly attractive, direct benefit to the RC officer considering applying for a joint assignment carrying the requirement to complete the proposed schooling. If the steering committee desires that the very best RC officers apply for these positions, the advanced JPME course and joint tour completion should become part of the RC officer reward system. While the working group discussed this matter at some length, we could not agree on how such recognition might best be made.

The final personnel management problem discussed by the working group dealt with billet management. LMI staff members made us aware of widespread and large discrepancies between the joint officer billet lists maintained by the RCs and those lists (purported to represent the same positions) maintained by the joint organizations themselves. The working group recognizes that organizational manning documents are notorious sources of temporary discrepancies and disagreements between the personnel and manpower communities of the military services, but the magnitude of the difficulties described to this group would seem to amount to a major impediment to the effective management of these officers and their positions in the joint world. While we had no reason to question LMI's assertion, we could not reach agreement on any specific recommendation to attack the problem.

COORDINATION

The steering committee has a large and clear coordinating role to play in launching this initiative successfully. The membership of the steering committee itself offers assurances that major issues coming before that body will receive review by all interested parties. The working group is also aware that the committee will soon bring this initiative before the Military Education Coordination Conference. That act will further distribute the institutional involvement in this enterprise and should help ensure its success.

The coordination role of the steering committee is temporary and will ultimately be assumed in the normal interrelationships among staff entities and institutions that mark the ongoing PME efforts within DoD.

VALIDATION

Validation of the new educational program—a considered judgment that this advanced course is important, efficacious, and worthy of attendance by selected RC officers—is an important step in the preparation of RC officers to do joint work effectively. As stated in an earlier section, the working group believes that the responsibility for an evaluation leading to any such supportive conclusion rests with the Joint Staff as part of their JPME oversight responsibilities. While clearly not a part of the Program for the Accreditation of Joint Education (PAJE),[2] the assessment of this new educational venture for RC officers nevertheless lies within the purview of the Joint Staff.

As the initiative is developed and implemented over the next 2 years, the steering group should anticipate information from the Joint Staff on the related plans for evaluation and validation of the program.

[2] The PAJE process was established by the Chairman of the Joint Chiefs of Staff to assess the operation of the Program for Joint Education (PJE) at intermediate and senior PME institutions. While similar and related, the present initiative for RC officers will not become part of the PJE.

Chapter 5
Resource Support

PURPOSE

A resource support subgroup was established to discuss resource-related aspects of the Advanced RC JPME initiative and to report its observations and recommendations to the full working group. This chapter summarizes those discussions, which included both an assessment of the dollar and manpower requirements for implementation and the broader topic of resource management considerations. The positions represented here have been endorsed by the working group.

BACKGROUND

Resource issues are key to achieving a consensus about Advanced RC JPME. Continuing decreases in military and civilian end strengths and funding have resulted in missions that are currently unfunded or underfunded. New requirements without resources must compete against both currently funded as well as unfunded requirements. Additionally, resource constraints cause the RCs to constantly reassess their current resource allocations, particularly in cases where they support requirements established outside the RC or service.

RC military pay to support schools and training is a scarce resource. This portion of military pay represents a discretionary source of funding that historically has diminished to pay for increasing mandatory requirements. Current funding shortfalls make it impossible to send all newly assessed officers to basic officer training. This inability fully to educate new officers exacerbates a shortage of officers and adversely impacts the RCs' need to fill vacant positions in the current force structure. A key RC concern is that no additional training (and resource) requirement be created that would further diminish funding for higher priority service needs.

The USAR has expressed a concern about the affordability of manpower that it currently provides to the RCNSC. The current proportion of USAR manpower for instructors significantly exceeds the USAR student ratio in the course. The working group recommendation to use RCNSC resources to implement a portion of Advanced RC JPME makes continued USAR support of RCNSC an important variable in determining incremental resources needed to support the program.

RESOURCE REQUIREMENTS

Overview

The resource support subgroup identified the following key assumptions:

- As a matter of policy, the Office of the Secretary of Defense (OSD) will not require Advanced RC JPME students to participate in active-duty in excess of the time required to complete the Advanced RC JPME classroom instruction, plus travel time allowances.

- Dollar and manpower resources currently programmed for the RCNSC, both at NDU and within the RCs, will continue at current levels and will be redirected to support Advanced RC JPME.

The first assumption is particularly important. Throughout the 2 days of the workshop, several participants in the full working group suggested that officers participating in the Advanced JPME program might be expected, or even required, to serve annual training tours with their assigned units *in addition to* the time they serve while attending either of the bookend sessions. In the resource support subgroup, there was a strong consensus that the RCs would find this unacceptable because it would, in effect, double the cost of each officer's annual active-duty. The RCs felt strongly that this would be considered unaffordable.[1]

Advanced JPME resource implications are summarized below (and further explained in the remainder of this section):

- Incremental resource requirements to RC military pay appropriations to provide compensation to Advanced RC JPME students will be essentially neutral.

- Costs for the first bookend will be minimal and will affect NDU.[2]

- The majority of incremental costs will be required by AFSC to conduct the second bookend, develop curriculum, and develop and manage the bridge. These costs will fluctuate over the first 3 years as a result of the increase in

[1] While the primary concern in the resource support subgroup was the dollar cost of the potential doubling of annual training, the participants also expressed other concerns. These included the difficulties associated with taking additional time off from civilian jobs and the adverse impact on morale and retention that might result from increased periods of active-duty.

[2] Although AFSC is part of NDU, this discussion separately identifies each to distinguish resources associated with the first resident session, managed and conducted by NDU Headquarters at Fort McNair, and the second resident session and bridge, managed and conducted by AFSC at Norfolk.

student load beginning in the second year and the maturation of technology and curriculum in the bridge. An assessment of cost impacts follows:

- *Manpower*. AFSC has several requirements:
  - AFSC requires four full-time instructors and has recommended that they be in military positions manned by AGR officers. These instructors would develop course curriculum and administer the bridge.
  - Twenty RC personnel are required on active-duty for 19 days to act as adjunct faculty members.
- *Funding*. The working group was not able to determine operations and support costs for equipment, supplies, communications, and administrative support for the second bookend and the bridge. We recommend that a request be made to AFSC to provide resource information. This is addressed in greater detail in a subsequent section of this chapter.

Student Pay

Student pay projections indicate that the overall incremental impact on the RCs' military pay appropriations will be minimal. Potential savings in the compensation portion of military pay would be offset by projected increases in travel and per diem.

COMPENSATION

It is envisioned that Advanced RC JPME students will normally complete the 2-week (13-day) active-duty resident session (the initial bookend) in lieu of duty in their assigned units. Military compensation costs for AGRs attending Advanced RC JPME are neutral, since the program requires no increase in active-duty for the officers. Since some officers are assigned to OCONUS organizations and normally serve a 19-day active-duty period, a small savings in the compensation component of military pay should result from assigning officers to resident portions of Advanced RC JPME.

TRAVEL AND PER DIEM

Resource impacts associated with student travel to Advanced RC JPME should be minimal. Low travel costs of officers previously serving at a home location would be offset by cost avoidance of travel costs associated with cross-country and overseas assignments.

Student per diem costs are expected to increase to support attendance at the first bookend. Since on-base housing at Fort McNair is limited, most students would be housed off base and receive per diem pay.

First Bookend—NDU

Current plans redirect the activities and resources of the RCNSC to support the first resident session of Advanced RC JPME. RCNSC currently conducts two 2-week courses per year, each attended by approximately 200 students, for a total output of 400 students per year. During FY98, RCNSC will conduct a single NSC course for 200 students, revise its curriculum, and then conduct one resident session of Advanced RC JPME for 200 students. Since the student output for the combined RCNSC and Advanced JPME courses will remain at 400 students for FY98, NDU will incur only minor increases in operating and support costs. These costs are associated with printing and reproduction, copyright materials, and other Advanced RC JPME course-related materials.

In steady state, beginning in FY99, plans call for an Advanced RC JPME student output of 300, a reduction from the current RCNSC student output of 400. Specific savings resulting from the reduced student workload was not addressed during the working group discussions.

The Director, RCNSC, raised an issue concerning a requirement for two active-duty for training personnel to support Advanced RC JPME, but withdrew the issue from discussion when it could not be determined whether the requirement was incremental to current resources. The working group believes that meeting this requirement will not result in an increase in NDU costs.

We recommend that specific costing information be requested from NDU with regard to costs and savings associated with the first bookend.

The Bridge and the Second Bookend

Curriculum development, the bridge, and the second bookend will be managed by AFSC. Since manpower and some funding resources overlap these functional areas and will be managed by a single manager, they are combined for discussion in this section.

The bridge and the second bookend represent new missions and additional student output for AFSC. However, AFSC is familiar with JPME curriculum and has distance-learning capabilities that may afford efficiencies.

Technology and techniques associated with the bridge are evolving. AFSC currently has experience in several distance-learning technologies using various media. The working group indicated that the development of interactive CD-ROM based lessons was feasible since AFSC has experience in this area. Students

would need access to a computer with either a CD-ROM drive or Internet browser. Specific costs associated with the distance-learning bridge were not discussed by the working group, and it is not possible to estimate the magnitude of these costs without further information from AFSC. As currently envisioned, students will be responsible for accessing suitable computers and communications interfaces as needed.

AFSC identified two specific manpower requirements (summarized previously). The first manpower requirement, for four full-time instructors, supports curriculum development, development and management of the distance-learning bridge, and instruction during the second bookend. AFSC needs these personnel 1 year prior to the start of the Advanced RC JPME course. AFSC has indicated a preference for AGR officers to fill these requirements, which will result in incremental manpower and funding costs to the RCs. If civilians were used to fill these positions, responsibility for providing resources would shift from the RCs to OSD, and the source of funds would shift from the military pay appropriations to the operations and maintenance account supporting AFSC.

AFSC has identified a second manpower requirement for 20 RC personnel on active-duty for 19 days to act as seminar leaders. This requirement would begin in FY99 and constitutes an incremental manpower and funding cost to the RCs providing the officers.

RESOURCE MANAGEMENT

The subgroup discussed a number of resource management issues: resource strategies, issues related to guidance documents, resource reporting requirements, and the development of cost estimates.

Resource Strategies

The DoD Planning, Programming, and Budgeting System (PPBS) provides a management structure for obtaining resources for new initiatives and programs. In the normal course of events, new programs are considered for funding at least 2 years before the first funds can be made available. For example, the next PPBS cycle will begin with a planning phase in late 1997 or early 1998, and the first new resources from that cycle will be included in the FY00 budget, which will be submitted to Congress in February 1999.

Since it is intended that Advanced RC JPME be implemented in FY98, 2 years earlier than can be accommodated in the next PPBS cycle, an approach somewhat outside the normal procedures will have to be used to provide resources for FY98 and FY99. Fortunately, the PPBS structure provides for this.

The resource support subgroup developed a strategy or approach for three time frames: FY98, FY99, and FY00–05.

Fiscal Year 1998

At the time of the workshop, the FY98 budget was being reviewed by Congress and was expected to be enacted prior to, or shortly after, the start of the fiscal year on 1 October. The subgroup believes that the best approach to provide resources for FY98 is for all agencies to redirect existing resources to satisfy program requirements.

Fiscal Year 1999

By the time the steering committee meets, the military departments and defense agencies will have submitted their FY99 budgets to OSD and the annual OSD/OMB budget review will have begun.

The subgroup concluded that if the budgets require changes to implement Advanced RC JPME, OASD(RA) should coordinate with the concerned department or agency and with the OSD comptroller staff to draft the appropriate changes in a program budget decision (PBD), which is the standard decision document used in the annual budget review.

If the PBD approach fails and budget changes are still required, the remaining option will be to initiate a reprogramming request to Congress after the FY begins. Because reprogramming actions are much more difficult to prepare and manage than are PBD changes, the subgroup strongly suggests that the PBD option be used. This will require early identification of any required changes to the FY99 budget and prompt action to develop and coordinate the input to the PBD.

Fiscal Years 2000–2005

To provide resources after FY99, the normal PPBS cycle can be applied. OASD(RA), in coordination with J-7, will develop guidance for the Advanced RC JPME initiative, then the military departments and defense agencies will apply this guidance in developing their FY00–05 program objective memorandums (POMs).

The next section discusses how functional guidance can be published in order to influence resource decisions.

Guidance Documents

The primary DoD document that provides resource guidance within the context of PPBS is the Defense Planning Guidance (DPG). The DPG, which is published at the start of each PPBS cycle, is the output of the planning phase of PPBS and provides guidance to be used in the programming phase.

The subgroup initially concluded that it would be appropriate to publish guidance in the DPG concerning Advanced RC JPME. However, following the workshop, the subgroup discussed this approach with the Office of the Under Secretary of Defense for Policy, OUSD(P), the office that coordinates and publishes the DPG.[3] In this discussion, we learned that OUSD(P) strives to restrict the DPG to issues on which the Secretary of Defense (SECDEF) has taken, or should take, a position. OUSD(P) suggested that it would be more effective for the Assistant Secretary of Defense (Reserve Affairs) (ASD[RA]) to publish policy guidance to the services and RCs. In plenary sessions of the working group, it was reported that OASD(RA) is drafting a DoD directive to publish policy regarding Advanced RC JPME. This directive would be a natural vehicle for publishing the appropriate policy guidance.

The resource support subgroup recommended that the appropriate guidance be published in the DoD directive and that OASD(RA) hold open the option of drafting appropriate language for inclusion in the FY00–05 DPG. The working group concurs.

Resource Reporting Requirements

Within PPBS, the publication of guidance is usually followed by a requirement for the military departments and defense agencies to report on the extent to which they have complied with that guidance in their POMs and budgets. These reporting requirements are published in two documents: the POM Preparation Instructions (PPI) for the POM and Volume 2 of the DoD Financial Management Regulation (FMR) for the budget.

Reports submitted in response to the PPI and FMR serve as source documents for DoD's formal POM and budget reviews. In these reviews, OSD staff agencies assess how well the military departments and defense agencies have complied with guidance, then they can recommend to the SECDEF that POMs and budgets be changed as needed to improve compliance.

The working group is hesitant to make Advanced RC JPME a part of the formal POM and budget review processes since taking such a step might create an unnecessarily adversarial relationship among OASD(RA) and the RCs. At the same time, it would be useful for OASD(RA) to know, at least in the first few years of the program, how many officers were participating.

To satisfy these two concerns, the subgroup recommends that NDU provide informal reports to OASD(RA) each year on the number of officers that are enrolled

[3] Telephone conversation between Ms. Mary Scala, a program analyst in the Office of the Deputy Under Secretary of Defense (Requirements and Plans) (ODUSD[R&P]), and Mr. Joseph Romito of LMI on 24 September 1997.

in, and complete, the Advanced RC JPME course. The report should include the number of officers, broken out by RC and by unified or specified command.

Developing Cost Estimates

As discussed previously, the resource support subgroup was able to identify the areas where incremental costs are likely to be incurred and to make a preliminary assessment of the order of magnitude of the costs. However, the subgroup was not able to develop detailed cost estimates and agreed that these estimates would be needed as part of the recommendations to the steering group.

To facilitate the preparation of cost estimates, the subgroup developed a spreadsheet to be completed by each of the agencies expected to incur costs in developing and implementing the Advanced RC JPME initiative. This spreadsheet identifies each of the major functions or activities for which costs might be incurred and requires input for the upcoming year (FY98) through the end of the next programming period (FY05). The agencies that might incur incremental costs to implement the Advanced RC JPME initiative are NDU headquarters, AFSC, and the seven RCs.

Instructions for completing the spreadsheet are in Appendix C. These instructions, along with an electronic copy of the spreadsheet on a diskette, should be sent to the agencies where action is required. Each agency should complete its spreadsheet and return it to OASD(RA) in time to be incorporated into the decision briefing to the steering group.

Appendix A

Steering Committee Memorandum Establishing Charter for Senior-Level Working Group

ASSISTANT SECRETARY OF DEFENSE

WASHINGTON, DC 20301-1500

RESERVE AFFAIRS

19 SEP 1997

MEMORANDUM FOR ASSISTANT SECRETARY OF THE ARMY (M&RA)
ASSISTANT SECRETARY OF THE NAVY (M&RA)
ASSISTANT SECRETARY OF THE AIR FORCE (MRAI&E)
PRESIDENT, NATIONAL DEFENSE UNIVERSITY
DIRECTOR, ARMY NATIONAL GUARD
CHIEF, ARMY RESERVE
DIRECTOR, NAVAL RESERVE
DIRECTOR, AIR NATIONAL GUARD
CHIEF, AIR FORCE RESERVE
ASSISTANT DEPUTY CHIEF OF STAFF (M&RA) FOR RESERVE AFFAIRS, USMC
DIRECTOR OF RESERVE AND TRAINING, USCG

SUBJECT: Charter for Senior Level Working Group on Reserve Component Advanced Joint Professional Military Education (JPME)

Increased reliance on Guard and Reserve forces in support of our nation's military commitments brings with it a greater demand for Reserve component (RC) participation in the joint arena. In an effort to enhance the rapid and smooth integration of RC forces into the active forces, RC officers must be properly educated to meet JPME needs. Currently, across the DoD, there exists no comprehensive program of instruction that will provide RC officers with JPME beyond the current level (phase I) now available at our intermediate and senior service schools and their corresponding non-resident programs. Accordingly, the Steering Committee hereby establishes a "Senior-Level Reserve Component Working Group" to identify and investigate opportunities for providing RC officers advanced levels of JPME.

The immediate focus of the group will be to develop the ideas and concepts that have been under discussion by OASD/RA, the Joint Staff, and other interested organizations regarding the increasing need for more RC officers with JPME. To that end, this working group will evaluate, analyze, and make recommendations for methods and possible vehicles for providing RC officers JPME beyond the standard level now available. At a minimum, this "advanced" JPME must: (a) meet a sufficient number of the desired learning objectives in existing JPME curricula; (b) be customized to accommodate the limited time availability of RC officers; (c) keep costs to a minimum; and (d) provide an educational environment which fosters acculturation to and a greater understanding of the joint arena.

The working group will consider the views of all the stakeholders of the Reserve components, the joint arena end-users, and the educational institutions' curriculum designers. The recommendations must be based on the most practicable form of access by RC officers while meeting the educational objectives cited above.

The working group will develop a time-phased action plan with milestones for implementing the new method for providing advanced JPME to RC officers. This senior-level working group will review all aspects of policy relating to the management of RC officers in JPME. We expect the working group to convene for a one or two-day session by late September to work through the details of the four areas cited above. We believe this concentrated effort may require subsequent meetings of limited duration to finalize the product for submission to the Steering Committee. However, the bulk of the work should be accomplished during the initial session. As a result, the senior-level working group is expected to report its findings and recommendations by early October 1997.

We request you identify members of your organization to represent you on the working group and provide their names, phone numbers, and e-mail addresses to Colonel Fred Reinero, OASD/RA(M&P) at (703) 693-7490. Colonel Rowan Bronson from OASD/RA and Colonel John McLean, J-7 MED at (703) 695-8622, will co-chair the senior-level working group.

DC Blair

Dennis C. Blair
Vice Admiral, USN
Director, Joint Staff

Deborah R. Lee

Deborah R. Lee
Assistant Secretary of Defense
Reserve Affairs

Appendix B
Workshop on Advanced JPME for RC Officers Attendees

2000 Corporate Ridge, McLean, Virginia
22–23 September 1997

Name	Representing	Phone/Fax	E-Mail Address
Dr. John Ballard Curriculum Director	AFSC	(757)444-6965 (757)444-5022	ballardj@afscmail.afsc.edu
CAPT Doug Bellows Director MPT Policy	USNR	(703) 601-1840 (703) 601-2000	bellows.doug@hqnavy.mil
Col Paul Briggs Department Director	Marine Corps University College of Continuing Education 2076 South Street Quantico, VA 22434-5068	(703) 784-1079	briggsf.@mqg-smtp3.usmc.mil
Col Rowan W. Bronson Assistant Director	OASD/RA Room 2D517 Pentagon	(703) 693-8109 (703) 695-3659	rbronson@OSD. pentagon.mil
Mr. Roy Capozzi	LMI 2000 Corporate Ridge McLean, VA 22102	(703) 917-7417 (703) 917-7475	rcapozzi@lmi.org
Dr. Charles C. Chadburn	Naval War College Building 101-W Washington, DC 20372	(202) 433-6208 (202) 433-2714	chadbur@usnwc.edu
CAPT Doug Clapp Chief, Office of Res. Affairs CGHQ	USCGR	(202) 267-0614 (202) 267-4243	declapp@comdt.uscg.mil
COL Bob Clark	J-7/Med Pentagon	(703) 695-9203 (703) 697-2515	clarkrl@js.pentagon.mil
Ms. Elizabeth Dial	LMI 2000 Corporate Ridge McLean, VA 22102	(703) 917-7382 (703) 917-7475	edial@lmi.org
LTC Bert Gagne Deputy Chief OPN/TNG-OCAR	USAR 2400 Army Pentagon Washington, DC 20310	(703) 695-3662 (703) 693-5321	gagne@pentagon-ocarl.army.mil
COL Marlin Guild Chief, Personnel Division, OCAR	OCAR	(703) 696-6200 (703) 696-6510	guild@pentagon-ocarl.army.mil

Workshop Attendees (Continued)

Name	Representing	Phone/fax	E-mail address
CDR Marty Kauchak Deputy Director Training Ed/Tech	OASD/RA(RTM) Room 2E515 Pentagon Washington, DC 20301-1500	(703) 614-4186 (703) 693-5371	mkauchak@OSD.pentagon.mil
Major Mary Lynom Chief Education Branch	ANGSC	(301) 836-8877 (301) 836-8525	lynomm@ang.af
Col Ron Manning Sr. Military Advisor SAF/MIR	SAF/MIR	(703) 693-9504 (703) 693-2701	manningr@af.pentagon.mil
Dr. LB McCluney Dean, Academic Affairs	AFSC	(757) 444-5074	mccluney@afscmail.afsc.edu
Col "Mac" McLean Chief, MED, Joint Staff	J-7/MED	(703) 697-8622 (703) 697-2515	mcleanjn@js.pentagon.mil
Col Bill Miller USAR Coordinator	NDU Building 62, QM170 Ft. McNair, DC 20319	(202) 685-3944 (202) 685-4409	millerb@ndu.edu
CDR Dick Page Special Asst. Naval Reserve	DASN/RA Room 5D825 Pentagon	(703) 693-0389 (703) 693-4959	page.richard@hq.navy.mil
Dr. Dayton Pickett	LMI 2000 Corporate Ridge McLean, VA 22102	(703) 917-7363 (703) 917-7475	dpickett@lmi.org
LTC John Reynolds Chief, Officer Personnel Branch	NGB	(703) 607-7122 (703) 607-9587	reynoldsj@arng-rc-emh2.army.mil
Mr. Joseph Romito	LMI 2000 Corporate Ridge McLean, VA 22102	(703) 917-7349 (703) 917-7475	jromito@lmi.org
LtCol Ron See Chief , Personnel Plans & Policy	AF/REPX Room BF655 Pentagon	(703) 695-6220 (703) 614-8249	ron.see@re.hq.af.mil
Col Bryant Shaw Director, Academic Affairs	NDU Ft. McNair 20319	(202) 685-3841 (202) 685-3935	shawb@ndu.edu
Mr. David Smith	LMI 2000 Corporate Ridge McLean, VA 22102	(703) 917-7364 (703) 917-7475	dsmith@lmi.org
COL Ron Tipa DDARNG for Human Resources	NGB	(703) 607-7100 (703) 607-7108	tipr@ngb-arng.ngb.army.mil
COL Terry Young Director, Concepts Doctrine	USAWC Jt Education Box 518 Carlisle Bks, PA 17013	(717) 245-2432 (717) 245-4721	youngtj@carlisle-emh2.army.mil

Appendix C
Developing Cost Estimates

As described in Chapter 5 of this report, each agency that will incur costs to implement the Advanced RC JPME initiative will be asked to provide OASD(RA) with an estimate of its incremental resource requirements. Agencies should submit a narrative justification for their estimated resource requirements, and should also electronically complete a Microsoft Excel spreadsheet developed by the resource support subgroup.

The following agencies should provide their cost estimates:

- NDU.
- AFSC (with the concurrence of NDU). AFSC is a subordinate element of NDU and its resource requirements would normally be included in the NDU total. However, at this early stage in the project, greater visibility over AFSC's costs would be useful to managers.
- The RCs of DoD and the Department of Transportation: Army National Guard, Army Reserve, Naval Reserve, Marine Corps Reserve, Air National Guard, Air Force Reserve, and Coast Guard Reserve.

A due date for agency input should be selected that enables OASD(RA) to incorporate the input into the upcoming decision briefing to the steering group.

Structure of the Excel File

The Excel file contains ten individual worksheets. Nine of the worksheets are identical, with one sheet for each agency. The tenth worksheet is a summary sheet that will reflect the sum of all agencies' costs. The column headings for each worksheet are the fiscal years, FY98 through FY05, and the row headings reflect the activities or functions for which agencies are expected to incur costs. Table C-1, with a limited number of columns, shows the worksheet format.

Instructions for Completing the Spreadsheet

The following general instructions are provided:

1. Each agency will enter data only on its worksheet. The Total Requirements worksheet is locked and is reserved for use by OASD(RA).

Table C-1. Format for Reporting Cost Estimates

Cost category	FY98	FY99
Curriculum development		
Left bookend		
Right bookend		
Bridge		
Total curriculum development costs		
Distance learning		
Hardware and software acquisition		
Media development		
Leased communications and Internet access		
Total distance learning costs		
Correspondence instruction		
One-time startup costs		
Recurring operations costs		
Total correspondence instruction		
Instructor costs		
Base operations and infrastructure costs		
Printing and reproduction		
Administrative and classroom facilities		
Furnishings		
Other classroom equipment		
Billeting		
Transportation		
Other base operations costs		
Total base operations and infrastructure costs		
Student costs		
Pay		
Travel and per diem		
Total student costs		
Other costs (add items as needed)		
Field trips		
Honoraria for guest speakers		
Total other costs		
Grand total		

2. Estimates will be entered in thousands of current (i.e., then-year) dollars, with no decimal values. The number format in the spreadsheet should not be changed.

3. The worksheet is designed to accommodate all cost categories, and it is anticipated that most agencies will have costs in only a few categories. In the categories for which an agency has no costs, the cells may be left blank.

4. Only incremental or additive costs will be reported. Resource requirements that will be satisfied by redirecting previously programmed or budgeted resources will not be shown. For example, if personnel requirements are satisfied by diverting personnel from one duty to another, then pay costs will not be reported. Of course, if such a situation generates an increased requirement for travel and per diem funds, then those costs will be reported. It is expected that resource requirements will be satisfied, at least in part, by redirecting resources in all categories.

5. Costs are to be reported by the agency that will pay the bill, which might not be the agency that will drive the cost or derive the direct benefit. For example, if the components are directed to provide personnel to serve as seminar leaders at either bookend, any incremental costs associated with these personnel will be reported by the RCs, not by NDU or AFSC.

The following instructions pertain to specific cost categories:

1. Distance learning: In this context, distance learning refers to electronic media, not conventional correspondence courses.

2. Correspondence instruction: The working group seemed to conclude that conventional, paper-based correspondence courses would not be needed for implementation of the program. This category is provided in the event that this conclusion was erroneous.

NARRATIVE JUSTIFICATION

Each agency will submit a narrative justification to accompany its spreadsheet. For each category and year for which resource requirements are reported in the spreadsheet, the narrative will describe what the dollars will be used for, amplifying the cost category as necessary. For example, an entry for curriculum development might explain that resources will be required to adapt the existing RCNSC curriculum to meet the needs of the Enhanced RC JPME course.

In addition, the narrative will discuss or describe the existing resources that will be redirected to help offset new requirements. This explanation should address in qualitative terms the impact of redirecting the resources.

ANTICIPATED COST REQUIREMENTS

NDU, AFSC, and the RCs should use Table C-2 as a guide in developing their estimates of incremental costs. This table identifies selected cost drivers and provides the working group's assessment of whether incremental costs are likely to occur in these areas. In this table, the "reference" column identifies the chapter(s) in this report where the item is discussed in greater detail.

Table C-2. Anticipated Resource Impact Areas

Item	Reference	Responsibility	Comments
Four billets for AGR/TAR to develop curriculum at AFSC beginning in FY99	3	USNR USMCR ARNG or USAR ANG or USAFR	
Four ADSW tours to develop curriculum at AFSC in FY98	3	USNR USMCR ARNG or USAR ANG or USAFR	It is expected that these requirements will be met with funds already programmed and budgeted for ADSW.
Joint IMA reserve unit at AFSC to provide 20 permanent AFSC faculty members	3	Unspecified Component	
Twenty temporary AFSC faculty members	3	NDU or unspecified Components	
Curriculum development	2, 3	AFSC	
Administration, conduct, and support for first bookend of instruction	2, 3	NDU	Since the Advanced RC JPME course replaces the RCNSC, incremental costs are expected to be minimal.
Administration, conduct, and support for second bookend of instruction	2, 3	AFSC	
Administration, conduct, and support for distance learning bridge	2, 3	AFSC	
One-time start-up costs for distance learning bridge	2, 3	AFSC	
Officers' attendance at bookend instruction	2, 3	Components	Because course attendance will be in lieu of active duty with assigned units, there will be no incremental compensation costs. There might be minor variations in travel and per diem requirements.

Appendix D
Implementation Plan

The table that begins on the following page (Table D-1) summarizes the key actions required for implementation of the Enhanced RC JPME program. The table shows the following information:

- Chapter (page): The chapter and page number in this report where the action is discussed in greater detail
- Action: The action or event that must be accomplished
- Start: The projected start date for the action
- Complete: The projected or required completion date for the action
- OPR: The office of primary responsibility for completing the action
- Coordination: The offices and organizations with which the OPR should coordinate
- Comments: Amplifying notes as required.

Table D-1. Partial Management and Administration Implementation Plan

Chapter (page)	Action	Start	Complete	OPR	Coordination	Comments
3 (3-3)	Oversee the establishment of a joint IMA reserve unit of 20 officers at AFSC to provide faculty for the program.			OASD(RA) RCs		
3 (3-6)	Establish a 4-year tour as the standard for all services for the RC officers assigned to joint organizations.			OASD(RA)		
3 (3-2)	Identify funding for ADSW tours to develop the curriculum at AFSC. Select and order qualified officers to perform the duty.		Immediate	RCs		
3 (3-3)	Obtain 20 temporary faculty members for AFSC using one of the alternatives described at page 3-3.		Immediate	Steering Committee RCs		
5 (5-8)	Issue tasking to agencies to submit cost estimates.	2 Oct 97	6 Oct 97	OASD(RA)		
5 (5-8)	Provide cost estimates to OASD(RA).	7 Oct 97	16 Oct 97	NDU AFSC RCs		Completion date should be adjusted to enable OASD(RA) to prepare briefing for Steering Group.
5 (5-6)	Develop FY99 PBDs if needed.	1 Oct 97	1 Nov 97	OASD(RA)	RCs OUSD(C)	
4 (4-2)	Distribute to all joint organizations except the Defense Intelligence Agency and the Defense Logistics Agency the number of advanced JPME requirements appropriate to each organization.	6 Oct 97	30 Nov 97	OASD(RA)		
5 (5-7)	Draft guidance for inclusion in FY00–FY05 DPG.	1 Nov 97	30 Nov 97	OASD(RA)	J-7, RCs	

Table D-1. Partial Management and Administration Implementation Plan (Continued)

Chapter (page)	Action	Start	Complete	OPR	Coordination	Comments
4 (4-1)	Provide Director with a directive to execute the educational mission embodied in this initiative.	Oct 97	Dec 97	Steering Committee	J-7	
3 (3-4)	Develop admission policies that maintain appropriately high standards while recognizing the differences in the Service's PME cultures, to the end that participating RC officers are treated equitably.		1 Jan 98	OASD(RA)		The rules must be established in time to process admissions applications for July 1998 bookend.
4 (4-1)	Publish DoD directive establishing an advanced JPME program for RC officers.	Sep 97	Jan 98	OASD(RA)	Normal	
3 (3-5)	Identify officers to attend first and subsequent Advanced RC JPME courses.		1 May 98	RCs	Joint organizations	Completion date is shown only for the initial course.
5 (5-7)	Provide informal reports to OASD(RA) on number of officers enrolled in and completing the course.		1 Aug 98	NDU		Completion date is shown only for the initial course.
5 (5-6)	Program and budget to provide required resources to meet program requirements in FY00–FY05.	1 Feb 98	25 Sep 98	NDU AFSC RCs		

Table D-1. Partial Management and Administration Implementation Plan (Continued)

Chapter (page)	Action	Start	Complete	OPR	Coordination	Comments
5 (5-6)	Redirect FY98 resources as needed to meet program requirements.	1 Oct 97	30 Sep 98	NDU AFSC RCs		
3 (3-2)	Identify four billets for AGR/TAR curriculum designers. Assign qualified officers to these positions.		1 Oct 98	RCs		
3 (3-6)	Develop and implement a method to identify and track officers who have completed the Advanced RC JPME course.		1 Mar 99	OASD(RA) RCs		
5 (5-6)	Initiate FY99 reprogramming requests if needed.	1 Oct 98	30 Jun 99	NDU AFSC RCs		

Appendix E
Abbreviations

ADSW	Active Duty for Special Work
AFSC	Armed Forces Staff College
AGR	Active Guard/Reserve
ANG	Air National Guard
ARNG	Army National Guard
ASD	Assistant Secretary of Defense
CINC	Commander-in-Chief
DPG	Defense Planning Guidance
FMR	Financial Management Regulation
FY	fiscal year
IMA	Individual Mobilization Augmentee
JPME	Joint Professional Military Education
LMI	Logistics Management Institute
NDU	National Defense University
OASD(RA)	Office of the Assistant Secretary of Defense (Reserve Affairs)
OCONUS	outside CONUS
OMB	Office of Management and Budget
OPR	office of primary responsibility
OSD	Office of the Secretary of Defense
OUSD(P)	Office of the Under Secretary of Defense for Policy
PAJE	Program for the Accreditation of Joint Education
PBD	program budget decision
PJE	Program for Joint Education
PME	Professional Military Education
POM	program objective memorandum
PPBS	Planning, Programming, and Budgeting System

PPI	POM Preparation Instructions
RC	Reserve Components
RCNSC	Reserve Component National Security Course
SECDEF	Secretary of Defense
TAR	Training and Administration of the Reserves
TDY	temporary duty
USAFR	U.S. Air Force Reserve
USAR	U.S. Army Reserve
USCGR	U.S. Coast Guard Reserve
USMCR	U.S. Marine Corps Reserve
USNR	U.S. Naval Reserve
VTC	video-teleconference

Appendix G
Abbreviations

ACSC	Air Command and Staff College
ADSW	Active Duty for Special Work
AFIS	Armed Forces Information Service
AFSC	Armed Forces Staff College
AGR	Active Guard/Reserve
ANG	Air National Guard
ARNG	Army National Guard
ARPA	Advanced Research Projects Agency
ASD	Assistant Secretary of Defense
ASD(C^3I)	Assistant Secretary of Defense for Command, Control, Communications, and Intelligence
ASD(FM)	Assistant Secretary of Defense for Financial Management
ASD(HA)	Assistant Secretary of Defense for Health Affairs
ASD(LA)	Assistant Secretary of Defense for Legislative Affairs
ASD(RA)	Assistant Secretary of Defense for Reserve Affairs
ASD(SO/LIC)	Assistant Secretary of Defense for Special Operations/Low Intensity Conflict
AWC	Army War College
BMDO	Ballistic Missile Defense Organization
C^3I	command, control, communications, and intelligence
C^4	command, control, communications, and computers
C^4I	command, control, communications, computers, and intelligence
C^4ISR	command, control, communications, computers, intelligence, surveillance, and reconnaissance
CAS^3	Combined Arms Services Staff School
CGSC	Army's Command and General Staff College
CINC	Commander-in-Chief

CJCS	Chairman of the Joint Chiefs of Staff
CNCS	College of Naval Command and Staff
DEA	Drug Enforcement Agency
DFAS	Defense Finance and Accounting Service
DISA	Defense Information Systems Agency
DLSA	Defense Legal Services Agency
DODIG	Department of Defense Inspector General
DPG	Defense Planning Guidance
DUSD(ES)	Deputy Under Secretary of Defense (Environmental Security)
DUSD(PS)	Deputy Under Secretary of Defense (Policy Support)
FMR	Financial Management Regulation
FY	fiscal year
GNA	Goldwater-Nichols Act
ICAF	Industrial College of the Armed Forces
IMA	Individual Mobilization Augmentee
JMIC	Joint Military Intelligence College
JPME	Joint Professional Military Education
JSO	Joint Specialty Officer
LMI	Logistics Management Institute
MCC&SC	Marine Corps Command and Staff College
MCC&SCNP	Marine Corps College of Command and Staff Nonresident Program
McWAR	Marine Corps War College
MTR	Military Technological Revolution
NATO	North Atlantic Treaty Organization
NatWar	National War College
NavWar	Naval War College
NCESGR	National Committee for Employer Support of the Guard and Reserve
NDU	National Defense University
NORAD	North American Aerospace Defense Command

OASD(RA)	Office of the Assistant Secretary of Defense (Reserve Affairs)
OCONUS	outside CONUS
OMB	Office of Management and Budget
OPR	office of primary responsibility
OSD	Office of the Secretary of Defense
OUSD(P)	Office of the Under Secretary of Defense for Policy
PAJE	Program for the Accreditation of Joint Education
PBD	program budget decision
PJE	Program for Joint Education
PME	Professional Military Education
POM	program objective memorandum
POW/MIA	Prisoner of War/Missing in Action
PPBS	Planning, Programming, and Budgeting System
PPI	POM Preparation Instructions
RC	Reserve Components
RCNSC	Reserve Component National Security Course
RFPB	Reserve Forces Policy Board
RMA	Revolution in Military Affairs
SECDEF	Secretary of Defense
SOUTHCOM	United States Southern Command
TAR	Training and Administration of the Reserves
TDY	temporary duty
USAFR	U.S. Air Force Reserve
USAR	U.S. Army Reserve
USCGR	U.S. Coast Guard Reserve
USD(P&R)	Under Secretary of Defense (Personnel and Readiness)
USMCR	U.S. Marine Corps Reserve
USNR	U.S. Naval Reserve
VTC	video-teleconference

REPORT DOCUMENTATION PAGE

Form Approved
OPM No.0704-0188

Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources gathering, and maintaining the data needed, and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington Headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302, and to the Office of Information and Regulatory Affairs, Office of Management and Budget, Washington, DC 20503.

1. AGENCY USE ONLY *(Leave Blank)*

2. REPORT DATE
Nov 98

3. REPORT TYPE AND DATES COVERED
Final

4. TITLE AND SUBTITLE
Joint Professional Military Education for Reserve Component Officers
A Review of the Need for JPME for RC Officers Assigned to Joint Organizations

5. FUNDING NUMBERS
C DASW01-95-C-0019
PE 0902198D

6. AUTHOR(S)
Dayton S. Pickett, David A. Smith, Elizabeth B. Dial

7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES)
Logistics Management Institute
2000 Corporate Ridge
McLean, VA 22102-7805

8. PERFORMING ORGANIZATION REPORT NUMBER
LMI– RA501R1

9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES)
Henry J. Schweiter
Deputy Assistant Secretary of Defense/Reserve Affairs (Manpower and Personnel)
1500 Defense Pentagon, Room 2E520
Washington, DC 20301-1500

10. SPONSORING/MONITORING AGENCY REPORT NUMBER

11. SUPPLEMENTARY NOTES

12a. DISTRIBUTION/AVAILABILITY STATEMENT
A: Approved for public release; distribute to DITC and defense libraries, NTIS, or other appropriate government report databases.

12b. DISTRIBUTION CODE

13. ABSTRACT *(Maximum 200 words)*

This study identifies the need for joint professional military education (JPME) for the approximately 4,400 Reserve Component (RC) officers now working in the joint organizations of DoD. Specifically, it identifies the type and amount of JPME needed by a large minority of these officers if they are to be prepared properly to do joint work effectively. The study involved identifying the individual jobs performed by all RC officers, followed by a survey of the supervisors of all those positions. The survey responses outlined the need for specific kinds of job activities, and those activities were then linked to the learning objectives that characterize the JPME programs now offered. The ensuing analysis revealed the need for approximately 2,000 RC officers to complete basic (or Phase I) JPME, with over 1,200 of those officers requiring additional - or advanced - JPME. Workshops of military educators and Reserve Component leaders then developed an RC-oriented advanced JPME curriculum, and this curiculum was endorsed in the study's final report.

14. SUBJECT TERMS
joint military education, military education, professional military education, Reserve Component(s), officer education

joint organizations, joint matters, joint duty, command and staff college, war college, command and staff schools, joint curriculum, National Guard

15. NUMBER OF PAGES
156

16. PRICE CODE

17. SECURITY CLASSIFICATION OF REPORT
Unclassified

18. SECURITY CLASSIFICATION OF THIS PAGE
Unclassified

19. SECURITY CLASSIFICATION OF ABSTRACT
Unclassified

20. LIMITATION OF ABSTRACT
UL