

DEPARTMENT OF DEFENSE

JOINT OFFICER MANAGEMENT

JOINT QUALIFICATION SYSTEM

IMPLEMENTATION PLAN



March 30, 2007

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EXECUTIVE SUMMARY

The Secretary of Defense shall establish different levels of joint qualification, as well as the criteria for qualification at each level. Such levels of joint qualification shall be established by the Secretary with the advice of the Chairman of the Joint Chiefs of Staff. Each level shall, as a minimum, have both joint education criteria and joint experience criteria. The purpose of establishing such qualification levels is to ensure a systematic, progressive, career-long development of officers in joint matters and to ensure that officers serving as general and flag officers have the requisite experience and education to be highly proficient in joint matters.

John Warner National Defense Authorization Act for Fiscal Year 2007, Sec. 516

The Joint Qualification System (JQS) Implementation Plan establishes a joint force management infrastructure as dynamic as the environment in which the joint forces operate. It creates a system which advances the concept of career-long accumulation of joint experiences, education, and training as advocated in the Department's Strategic Plan for Joint Officer Management (JOM) and Joint Professional Military Education (JPME) and the Chairman of the Joint Chiefs of Staff Vision for Joint Officer Development.¹ The statutory changes in the John Warner National Defense Authorization Act for Fiscal Year 2007 (hereafter FY07 NDAA) which underpin the JQS go into effect October 1, 2007.

This plan describes a four-level JQS that provides a path for attaining joint qualification through either a traditional joint duty assignment or by accumulating an equivalent level of joint experience, education, and training over the course of a career. The common requirement is that the appropriate level of JPME must be completed in order to achieve joint qualification.

The methodology used to account for this joint experience, education, and training is a points system. This points system provides an inherent advantage over the traditional time-based system in that it creates an opportunity to account for the intensity of each joint activity. This plan leverages this unique characteristic by giving added value to joint combat and non-combat contingencies. The points system also allows the level of involvement of the individual to be weighted. Individuals who lead or plan joint exercises are given an increased number of points

¹ The Strategic Plan for JOM & JPME was approved by the Secretary of Defense 3 April 2006 (Strategic Plan objectives at Appendix F). The Chairman's JOD Vision was issued in November 2005.

over participants. The fidelity afforded by this methodology vastly enhances the value of the JQS to the Department.

For the past twenty years officers have aspired to earn the Joint Specialty Officer (JSO) designation. While the premise of that designation (that an officer be proficient in joint matters) remains the same, the title has changed to "Joint Qualified Officer (JQO)"

Another significant aspect of this JQS Implementation Plan is that it is open to Reserve Component (RC) officers². They are able to earn the same qualifications as Active Component (AC) officers³. To ensure parity RC officers who served in joint organizations and would have met the statutory requirements of title 10 USC, chapter 38 will be credited with the same joint credentials that were available to AC officers dating back to the implementation of the Goldwater Nichols Act of 1986.

Additionally, all officers regardless of component will be able to self-nominate their joint activities for point recognition dating back to September 11, 2001. This will enable the capture of joint experience, education and training outside the traditional joint duty assignment positions.

Ultimately these levels of joint qualification will enhance the ability of the Department to incorporate the wealth of information captured by the JQS into assignment, promotion, and development decisions. This will directly benefit the warfighting commanders who will have improved visibility of the joint qualifications of candidates for key positions on their staffs.

² The term "Reserve Component" as used in the plan and subsequent joint officer management policies and procedures refers to officers on the Reserve Active Status List.

³ The term "Active Component" as used in the plan and subsequent joint officer management policies and procedures refers to officers on the Active Duty List.

1.0 Introduction

1.1 Purpose

The Department of Defense (DoD) Joint Qualification System (JQS) Implementation Plan introduces the multi-level joint qualification concept and identifies lead and supporting organizations responsible for operationalizing it effective October 1, 2007. This plan also describes necessary actions and assigns completion dates for developing supporting guidance, formal instructions, required data elements and IT systems that will enable the Department to assess an officer's progressive accumulation of joint experience, education, and training that contribute to his or her development of expertise in joint matters. The JQS Implementation Plan operationalizes the concepts introduced in the Department's Strategic Plan for JOM and JPME.

1.2 Background

Twenty-one years after enactment of the Goldwater-Nichols Department of Defense Reorganization Act of 1986 (GNA), the Department begins a new chapter to further enhance Joint Officer Management in the 21st century. Under the JQS all joint experiences, including education and training that contribute to an officer's career-long development of expertise in joint matters, may be recognized.

The original GNA joint officer management provisions were a time- and billet-based system that accredited officers for serving 36 months in joint organizations (e.g., staff assignments to Combatant Command headquarters, the Joint Staff, the Office of the Secretary of Defense, or defense agencies). Completion of JPME Phase II along with an assignment to one of these organizations for the requisite tour length was the standard for gaining expertise in joint matters.

Basic Tenets of Original GNA

- Enhance joint warfighting capabilities
- Increase the quality of officers in joint assignments
- Ensure that officers are not disadvantaged by joint service
- Ensure that general and flag officers are well-rounded in joint matters
- Enhance stability and increase the joint experience of officers in joint matters
- Strengthen the focus of professional military education in preparing officers for joint duty assignments

Figure 1

Through the years, “jointness” migrated to organizations such as the joint task force. This is a testament to the tremendously positive impact of the GNA on the Department of Defense. Additionally, operations on the global stage such as Desert Shield/Desert Storm, and OPERATIONS ENDURING FREEDOM and IRAQI FREEDOM; along with domestic operations in JTF Katrina and the ongoing border patrol missions have proven that joint operations are no longer conducted only by military organizations. Our forces regularly train, exercise, and conduct day-to-day operations with interagency, international, and non-governmental partners. Thousands of officers are gaining significant experience in joint matters

as part of JTF headquarters and in numerous joint exercises and joint training events/courses. Since many of these activities are of short duration and involve our international and non-military partners, the ability of the Department to recognize this experience is limited.

Statutory changes in the John Warner National Defense Authorization Act for Fiscal Year 2007 (FY07 NDAA) enable the Department to recognize a myriad of joint experiences⁴. FY07 NDAA directed the Secretary to "establish different levels of joint qualification, as well as the criteria for qualification at each level." The Department is proposing a JQS that supports the original tenets of the GNA, while offering enhanced flexibility to recognize the dynamic and abbreviated joint experiences that are increasingly characteristic of 21st Century warfare.

This system will enable officers to be recognized, through a points system, for their joint experiences in a systematic, progressive manner. Under the JQS, joint experiences will accrue points toward four successive levels of joint qualifications and provide the joint commander (e.g., COCOM commander) a greater degree of fidelity in assessing the capabilities of each officer. This will tremendously improve the ability of the Department to ensure the appropriate mix of joint-experienced officers in each organization.

The GNA established joint education along with a joint duty assignment (JDA) as the standard for the joint professional. Today, joint education remains central to the development of Joint Qualified Officers (JQO). For twenty-plus years the "Joint Specialty Officer" designation has been the gold standard of jointness. It signified that an officer had completed JPME II and a JDA. The JQS implementation plan will establish a method of tracking the accumulation of joint experience, joint education, joint individual training and self-development throughout an officer's career and provide for the awarding of a predefined qualification documenting the joint capabilities the officer possesses.

NDAA 2007⁵ directed the Secretary of Defense to submit a plan for the implementation of the joint officer management system, which will take effect on October 1, 2007. It provided the following guidance for what to include in the plan:

JSO-JOO Transition. "Pay particular attention to matters related to the transition of officers from the joint specialty system in effect before October 1, 2007, to the joint officer management system in effect after that date."

Authority to Count Retroactive Joint Experience. Include "policies and criteria to be used for designating officers as joint qualified on the basis of service performed by such officers before...the date of the enactment of this Act."

Designating Joint Qualified Officers. Include "policies and criteria prescribed by the Secretary of Defense to be used in making determinations under section 661(c)(1)(B)(ii)."

Legislative Changes. Include "recommendations of the Secretary for any legislative changes that may be necessary to effectuate the joint officer management system."

⁴ Joint experiences include joint training, education, participation in exercises, and self-development learning opportunities.

⁵ Sec 516(h)(2)

2.0 Transition from Joint Specialty System to Joint Qualification System

For twenty years, the “Joint Specialty Officer” designation has signified proficiency in “Joint Matters.” Officers earned the JSO designation upon completion of JPME II and a full JDA⁶. When the NDAA 2007 changes to title 10 USC, sec 661 take effect on October 1, 2007, the JSO moniker will be replaced by the term Joint Qualified Officer (JQO). While the JPME II-JDA method for attaining JQO status remains, officers may also achieve that distinction by accumulating joint experiences which the Secretary determines are equivalent to a traditional JDA. The JQS, discussed in more detail in section 3.0 of this plan, is a multi-level system where an officer attaining Level III is designated as a JQO. Ultimately, an officer may attain JQO status through a traditional assignment to a position on the joint duty assignment list or by accumulating a series of joint experiences to include joint deployments, exercises, and training. The common requirement for both is completion of JPME II (Advanced JPME (AJPME) is a suitable alternative for RC officers).

Officers designated as a JSO prior to October 1, 2007, will automatically be designated as a JQO on that date. Administrative processes and procedures will be disseminated through OSD and Joint Staff issuances to the Military Departments and the Defense Manpower Data Center (DMDC). Responsibility for actions required to accomplish this change are delineated in section 5.0 (Implementing Responsibilities and Roles) of this plan.

3.0 Policies and Criteria for Joint Qualification

The JQS is a multi-level system, open to all officers of the active and reserve components, which recognizes joint experiences, regardless of where they accrue. The majority of the force will continue to complete a traditional joint duty assignment (title 10, sec 664) along with the requisite JPME. The alternative method of earning joint qualification involves the career long accumulation of joint experiences which are recognized by the Chairman of the Joint Chiefs of Staff as imbuing officers with an equivalent level of joint capability and completion of the appropriate level of JPME.⁷

This career-long accumulation of joint experience encourages officers to earn progressive levels of joint qualifications based on knowledge, skills, and abilities in joint matters. Joint experiences may be accrued via duties with DoD, interagency, non-governmental, or international organizations and include long-term assignments or brief periods of intense joint operations. Unique to this system is the opportunity to acknowledge that officers also gain expertise in joint

⁶ If an officer completed two JDAs, he or she could request the Secretary waive the sequencing requirement. Additionally, a built-in exception allows officers serving in Critical Occupational Specialties (COS) to complete JPME II and the JDA out of sequence.

⁷ CJCSI 1800.01C, *Officer Professional Military Education Policy (OPMEP)*, 22 December 2005, is the governing issuance for joint education.

matters based on their participation in joint exercises and other forms of joint training⁸. These types of opportunities will also garner joint activity points for officers; however, these points alone will not enable an officer to earn joint qualification. A prescribed amount of joint experience, often with a recency requirement, is mandatory for each qualification level.

A formula developed to account for the type of joint experience, the intensity/environment of an experience as well as duration/frequency of the experience is key to the JQS. DoD Instruction (DoDI) 1300.20, *DoD Joint Officer Management Program Procedures*,⁹ will be revised to delineate policy for joint qualifications.

3.1 Policy.

- 3.1.1 The Military Departments are expected to provide the joint community with officers who are adept at their Service core competencies.
- 3.1.2 The JQS will allow officers to begin accruing points for their joint experiences at the earliest points in their career.
- 3.1.3 An officer must be in the grade of O-4 or above to be designated as a JQO.
- 3.1.4 Officers serving in a JDA (JDAL billet) must complete the tour length specified in title 10 U.S.C., §664.¹⁰
- 3.1.5 NDU graduates must continue to be assigned to traditional JDAs in compliance with title 10 U.S.C., §663.
- 3.1.6 Officers may gain joint experience while serving in a Service billet; however, Service billets will not be placed on the JDAL.
- 3.1.7 Cumulative joint credit will convert to joint qualification points.
- 3.1.8 Joint Qualification approval authorities are:
 - 3.1.8.1 Level I – Military Department, as applicable
 - 3.1.8.2 Level II – Chairman, Joint Chiefs of Staff
 - 3.1.8.3 Level III (Joint Qualified Officer) – USD(P&R), as designated by the Secretary of Defense under title 10 U.S.C., §661(b)(4).
 - 3.1.8.4 Level IV – USD(P&R), as designated by the Secretary of Defense under title 10 U.S.C., §661(b)(4).
- 3.1.9 If an officer is designated as a JSO prior to October 1, 2007, such officer will automatically be designated as a JQO and assigned 36 experience points.¹¹ Officers may have their records reviewed and validated for recognition of additional points.

⁸ An example of such training would be "Joint Knowledge Online" offered by the U.S. Joint Forces Command's Joint Warfighting Center. Using advanced technology training opportunities, combatant commanders, service members and multinational partners can participate in special training events and take advantage of on-line individualized training and education programs to increase their knowledge of joint and coalition operations. Such programs prepare personnel for real-world joint military assignments when time and resources for conducting a collective training event are scarce.

⁹ Most current version of DoDI 1300.20 is dated December 20, 1996.

¹⁰ Military Departments are required to maintain a 36 month tour length average for O-6's and below, and 24 months for G/FO's serving in JDAs.

¹¹ See Appendix C for Experience Point Accrual Formula and Joint Qualification Level 1-4 criteria.

- 3.1.10 Officers who have completed the requisite JPME II or AJPME (RC only) and a full JDA shall be submitted for JQO designation following procedures established in a Chairman Joint Chiefs of Staff Instruction (CJCSI).
- 3.1.11 Officers who have completed the requisite JPME II or AJPME (RC only) and have not been assigned to a JDA may submit a request to have their joint experiences assessed following procedures established in a Chairman Joint Chiefs of Staff Instruction (CJCSI) to determine if they are eligible to be designated as a JQO under provisions of title 10 U.S.C., §661(c)(1)(B)(ii).
- 3.1.12 For transition to the new system, priority processing will be afforded AC O-6s (colonels, or in the case of the Navy, captains) who are eligible for their respective Service's O-7 selection board between October 1, 2007 and April 1, 2009.

3.2 Criteria. Officers receive joint experience via:

- 3.2.1 Any assignment/duty designated by the CJCS with direct relevance to the definition of "Joint Matters".
- 3.2.2 Joint Training, Joint Exercise, Joint Education, or other Education (must have direct relevance to the definition of "Joint Matters") designated by the CJCS.
- 3.2.3 See Appendix C for Level 1-4 criteria and the Experience Point Accrual Formula.

4.0 Policies and Criteria for Retroactive Joint Qualification

JOM provisions of the original GNA were intended to promote assignments to the major joint organizations. One reason for this was the belief that these venues were where officers gained experience in developing/promulgating national military strategy and strategic plans. Another reason was that such joint duty assignments provided tour length stability. For the past 15 years, the joint task force construct has been used with more frequency, for combat, humanitarian, and domestic operations. Increasing numbers of officers are gaining joint experience through these venues but have not received joint credit because of the temporary nature of the billets and short deployments/tour lengths. Recognizing the need to acknowledge that officers in these positions have gained expertise in joint matters, NDAA 2007 included a provision to allow the Department to evaluate joint experiences of officers and to allow those experiences to be retroactively considered for joint qualifications.

Joint experiences on and after September 11, 2001 that were not captured under the legacy JOM system may be considered retroactively for joint qualification. Additionally, in recognition that the RC lacked the opportunity to receive equivalent joint credit under the GNA and for parity with AC officers, RC officers will be awarded joint duty credit for service in qualifying joint assignments designated under provisions of title 10 U.S.C., chapter 38 that were in effect from October 1, 1986 until September 30, 2007, including RC billets in OSD, the Joint Staff, Combatant Command headquarters, and Defense Agencies.

4.1 Policy.

- 4.1.1 From October 1, 2007 through September 30, 2010, officers may request an assessment of their joint qualifications based on joint experiences accrued during the specified retroactive periods.
- 4.1.2 The effective date of the joint qualifications resulting from retroactive experiences described in this implementation plan is the approval date of the qualification and does not constitute grounds for supplemental promotion consideration of a prior promotion selection board.
- 4.1.3 Joint experiences on and after September 11, 2001, under the criteria of the experience-based JQS as established by this implementation plan, apply to officers in all components.
- 4.1.4 Priority processing will be afforded AC O-6's (colonels, or in the case of the Navy, captains) who are eligible to meet their respective Service's O-7 selection board between October 1, 2007 and April 1, 2008.
- 4.1.5 Officers assigned to the RC who served in qualifying joint assignments¹² designated under provisions of title 10 U.S.C., chapter 38 that were in effect from 1986 until September 30, 2007 will be awarded full or cumulative joint credit (as applicable) and the JSO/JQO designation under Department and CJCS procedures in affect September 30, 2007.
 - 4.1.5.1 This shall include, as provided in statute, joint credit for Desert Shield/Desert Storm and for service in designated JTFs.

4.2 Criteria.

- 4.2.1 For joint experiences gained between September 11, 2001 and September 30, 2007 –
 - 4.2.1.1 See section 3.2 of this plan for applicable criteria.
 - 4.2.1.2 Procedures for requesting and processing requests will be promulgated by the CJCS.
- 4.2.2 RC only retroactive joint qualifications to inception of the GNA –
 - 4.2.2.1 The provisions of Title 10 USC, sections 661 and 664 enacted by the GNA of 1986 and all subsequent revisions in effect through September 30, 2007 shall apply.
 - 4.2.2.2 Procedures for requesting and processing requests will be promulgated by the CJCS.

¹² A "qualifying joint assignment" is one served in a billet that was on the Joint Duty Assignment List or a billet within a 100 percent joint organization (Office of the Secretary of Defense, Joint Staff, or Combatant Command Headquarters) and Defense Agencies that was designated to be filled only by RC officers.

5.0 Implementing Responsibilities and Roles

5.1 Responsibility.

5.1.1 The Under Secretary of Defense (Personnel and Readiness) shall –

- 5.1.1.1 Establish and promulgate policies for the transition of officers from the Joint Specialty System to the Joint Qualification System.
- 5.1.1.2 Establish and promulgate policies for the administration of the Joint Officer Management program.
- 5.1.1.3 Establish and promulgate policies for the September 11, 2001 retroactive experience program.
- 5.1.1.4 Monitor the progress of implementation actions to be executed by OSD, Joint Staff, and the Military Departments.

5.1.2 The Assistant Secretary of Defense (Reserve Affairs), under the Under Secretary of Defense (Personnel and Readiness) shall –

- 5.1.2.1 Establish and promulgate policies and procedures for processing requests for the GNA legacy retroactive joint credit.
- 5.1.2.2 Develop procedures for processing requests from RC officers.
- 5.1.2.3 Establish and promulgate policies and procedures for RC unique joint certification to enable the recognition of joint experiences, education and training.

5.1.3 The Chairman, Joint Chiefs of Staff shall –

- 5.1.3.1 Develop procedures to comply with this plan and subsequent DoDI guidance for the transition of officers from the Joint Specialty System to the Joint Qualification System.
- 5.1.3.2 Initiate regulations and procedures to ensure the Military Departments comply with the statutory and Department policy standards for joint officer qualifications.
- 5.1.3.3 Modify existing IT systems which support JOM to include future applications and interfaces with the Global Force Management (GFM)¹³ system.

¹³ GFM provides senior decision makers a process to assess quickly and accurately the impact and risk of proposed changes in forces/capability assignment, apportionment, and allocation. The data initiative associated with GFM, directed in "Strategic Planning Guidance, 2006-2011" is an effort within the DoD to formulate a strategy and systems for organizing data to better support the GFM process. Source: CJCS, DRAFT "Global Force Management Data Initiative Implementation Plan," January 5, 2007

- 5.1.3.4 In accordance with the JQS as implemented by this plan, assign point values to joint training and self-development courses certified to contribute to an officer's expertise in joint matters.
- 5.1.3.5 Identify, maintain, and publish a list of joint exercises.
- 5.1.3.6 Certify that the joint training courses, so designated by U.S. Joint Forces Command, do contribute to an officer's expertise in joint matters.

5.1.4 The Commander, U.S. Joint Forces Command shall --

- 5.1.4.1 Certify, maintain and publish a list of joint training courses that contribute to an officer's expertise in joint matters.

5.1.5 The Secretaries of the Military Departments shall –

- 5.1.5.1 Initiate regulations, policies and procedures to comply with this plan and subsequent DoDI and CJCSI guidance regarding Joint Officer Management.

6.0 Implementation Actions

The Joint Qualification System becomes effective October 1, 2007. In advance of that date a number of key actions must occur to ensure information systems, supporting data elements, and clearly defined processes and procedures are in place.

While many tasks can be performed in parallel, there are three key actions that must be executed in a timely fashion to ensure the Department can meet the October 1, 2007 effective date. Those three actions, reflected in red in the chart below, deal with the development and promulgation of policies and procedures. The following chart identifies necessary actions and assigns completion dates for developing supporting guidance, formal instructions, required data elements and IT systems, as well as other important steps to ensure initial operating capability is achieved.

6.1 CY 2006-2007

ACTION #	ECD	ACTION	OPR
6.1.1	Complete	Develop criteria for levels of joint qualification.	USD(P&R) & CJCS
6.1.2	15 Feb 07	Develop and maintain list/catalogue of JTFs established since September 11, 2001.	CJCS
6.1.3	1 Mar 07	Modify existing Joint Task Force Self-Nomination web page for use as the Joint Experience kiosk (interface between individual officers and their Service) to allow reporting of joint experiences.	CJCS J-1 OCR: DMDC

ACTION #	ECD	ACTION	OPR
6.1.4	1 Mar 07	Coordinate with DMDC to ensure modifications to the Joint Duty Assignment Management Information System (JDAMIS) are ready to make the JSO-JQO conversion	CJCS J-1 OCR: DMDC
6.1.5	NLT 31 Mar 07	Deliver JOM JQS Implementation Plan to the Senate and House Armed Services Committees.	USD(P&R) ODUSD(MPP)
6.1.6	31 Mar 07	Revise DoD Instructions to reflect policies that govern the Joint Qualification System.	USD(P&R) ODUSD(MPP)
6.1.7	30 Apr 07	Update CJCSM 3500.03A to institutionalize CJCS oversight over the certification of joint training courses that contribute to an officer's expertise in joint matters.	CJCS J-7
6.1.8	30 Apr 07	Identify and certify joint training courses whose content contributes to an officer's knowledge, skill, and ability in Joint Matters.	USJFCOM J-7
6.1.9	31 May 07	Identify and assign a point value for each certified joint training course within the parameters of the JQS	CJCS J-7 OCR: USJFCOM
6.1.10	31 May 07	Develop and maintain list/catalogue of certified joint training courses.	CJCS J-7
6.1.11	31 May 07	Develop CJCS Instructions to promulgate procedures for operationalizing the Joint Qualification System.	CJCS J-1
6.1.12	1 Jun 07	Prepare and staff delegation of authority letter for SecDef signature – delegates to USD(P&R) authority to designate officers as JQO IAW title 10 USC, sec 661(b)(2)-(4).	OUSD(MPP) OEPM
6.1.13	31 Jul 07	Services establish internal processes to comply with OSD policy and CJCS procedures regarding the JQS.	Services
6.1.14	31 Jul 07	Identify O-6 population, by name, that (1) would be eligible for JQO designation via the standard JDA/JPME II completion method with the sequencing no longer an issue; and (2) have completed JPME II and need their duty history assessed to determine if they have the appropriate number of joint experience points to qualify as a JQO	Services
6.1.14	15 Aug 07	Conduct Beta Test of "Joint Qualified Officer" designation procedures from sampling of O-6 records.	Services OCR: CJCS/J-1
6.1.15	1 Oct 07	NDAA 07 sec 516 and 519 provisions go into effect. (These provisions change title 10 USC sections 661 and 668)	
6.1.16	1 Oct 07	Joint Specialty Officers redesignated as Joint Qualified Officers.	Services

ACTION #	ECD	ACTION	OPR
6.1.17	31 Dec 07	Develop/execute Strategic Communication Plan to spread the word about the transition from the Joint Specialty System to the Joint Qualification System.	USD(P&R) ODUSD(MPP) OCR: CJCS/J-1

7.0 Challenges and Potential Barriers

As with any new program or major change to an existing program, it is important to acknowledge that no matter how much time and effort has been expended in planning for the transition to a new system, there will be challenges that may arise. This section identifies challenges that the Department will monitor as the JQS program is fielded. Additionally, potential barriers are noted for inclusion in the strategic communications plan, as well as through oversight reviews by the CJCS and USD(P&R).

7.1 Issues

- 7.1.1 Assignment stability in joint organizations (e.g. Services must maintain the 36 month tour length average, for O-6s and below).
- 7.1.2 Resource (manpower and funding) requirements to manage the supporting IT systems and processes.
- 7.1.3 IT and personnel systems may be challenged.

7.2 Potential Barriers

- 7.2.1 Timeliness of processing qualification packages.
- 7.2.2 Consistency of information reported/validated by the Services.
- 7.2.3 IT and personnel systems will experience overload during initial roll-out of the JQS.
- 7.2.4 Resource (manpower and funding) requirements to manage the supporting IT systems and processes.

8.0 Future Implementation Activities and Goals

8.1 CY 2008

ACTION #	ECD	ACTION	OPR
8.1.1	30 Jun 08	Identify/certify/maintain list of joint exercises (11 Sep 01 to the present)	USJFCOM J-7
8.1.2	30 Jun 08	Establish criteria for assessing joint content and value of other education experiences associated with the definition of joint matters	CJCS J-7
8.1.3	30 Jun 08	Establish criteria for and method of assessing joint experience in "in-Service" billets	CJCS J-1
8.1.4	30 Sep 08	Identify and incorporate business rules for broader joint experiences & training opportunities into CJCSI, as appropriate	CJCS J-1/J-7
8.1.5	31 Dec 08	Develop method to assess mastery of joint-leader competencies ¹⁴	CJCS J-7

8.2 CY 2009

ACTION #	ECD	ACTION	OPR
8.2.1	1 Jan 09	Remove temporary billets (e.g. validated JTF HQs positions) from the JDAL. Individuals filling these billets will have their joint experiences assessed under the "Alternate Path" under the JQS.	CJCS J-1
8.2.2	1 Oct 09	Joint Organizations incorporate Joint Qualification Levels as part of billet requisition	OSD, JS, COCOMs, Defense Agencies OCR: CJCS/J-1 WHS
8.2.3	31 Dec 09	Review/Evaluate Joint Qualification System	USD(P&R) and CJCS

8.3 CY 2010

ACTION #	ECD	ACTION	OPR
8.3.1	1 Oct 10	Create IT-enabled system that tracks and reports joint experience when it occurs. Seamless interface between the Services and appropriate Joint Qualification approval authority.	CJCS J-1
8.3.2	1 Oct 10	Develop JOM IT system interface within GFM structure	CJCS J-1/J-8

¹⁴ The CJCS Vision for Joint Officer Development issued in November 2005, states: (Pg 2) "This posits the requirement to identify and inculcate a set of joint leader competencies and skills based on the enduring values of the Joint Force." It further states: "The individual learner shall be assessed against the competencies and ability to demonstrate the desired behavior."

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APPENDICES

APPENDIX – A

CJCSI 1800.01C

Annex A to Appendix A to Enclosure A

ANNEX A TO APPENDIX A TO ENCLOSURE A
CJCSI 1800.01C
22 December 2005

GRADE	CADET/SHIPMAN	0-10-210-3	0-4	0-510-6	0-710-810-9
EDUCATION LEVEL	PRECOMMISSIONING	PRIMARY	INTERMEDIATE	SENIOR	GENERAL/FLAG
EDUCATIONAL INSTITUTIONS AND COURSES	Service Academies ROTC OCS/OTS	<ul style="list-style-type: none"> Branch, Warfare or Staff Specialty Schools Primary-Level PME Courses 	<ul style="list-style-type: none"> Air Command and Staff College Army Command and General Staff School College of Naval Command and Staff Marine Corps Command and Staff College JFSC, Joint and Combined Warfighting School JFSC, Joint Advanced Warfighting School 	<ul style="list-style-type: none"> Air War College Army War College College of Naval Warfare Marine Corps War College Industrial College of the Armed Forces¹ National War College¹ JFSC, Joint and Combined Warfighting School JFSC, Joint Advanced Warfighting School¹ 	<ul style="list-style-type: none"> CAPSTONE Joint Functional Component Commander Courses Joint Flag Officer Warfighting Course Pinnacle
LEVELS OF WAR EMPHASIZED	Conceptual Awareness of all Levels				
FOCUS OF MILITARY EDUCATION	Introduction to Services Missions	<ul style="list-style-type: none"> Assigned Branch, Warfare or Staff Specialty 	<ul style="list-style-type: none"> Warfighting within the context of Operational Art Intro to theater strategy and plans, national military strategy and national security strategy Develop analytical capabilities and creative thought 	<ul style="list-style-type: none"> Service Schools: strategic leadership, national military strategy and theater strategy NWC: national security strategy ICAF: national security strategy with emphasis on the resource components 	<ul style="list-style-type: none"> Joint matters and national security Interagency process Multinational operations
JOINT EMPHASIS	<u>Joint Introduction</u> <ul style="list-style-type: none"> National Military Capabilities and Organization Foundation of Joint Warfare 	<u>Joint Awareness</u> <ul style="list-style-type: none"> Joint Warfare Fundamentals Joint Campaigning 	<u>JPME Phase I</u> <ul style="list-style-type: none"> National military strategy National military capabilities command structure and strategic guidance Joint doctrine and concepts Joint and multinational forces at the operational level of war Joint planning and execution processes Information operations, C2 and battlespace awareness Joint force and joint requirements development 	<u>JPME Phase II</u> <ul style="list-style-type: none"> National security strategy National planning systems and processes National and theater military strategy, campaigning and organization Joint doctrine, force and requirements development Information operations, C2 and battlespace awareness Joint force and joint requirements development Joint strategic leader development 	<u>CAPSTONE</u> <ul style="list-style-type: none"> National security strategy Joint operational art Joint Functional Component Commander Courses & JFSC/C National security strategy National planning systems and organization National military strategy & organization Theater strategy, campaigning and military operations in Joint, interagency, and multinational environment Information operations Strategic leader development Pinnacle Joint/Combined force development Building & commanding the joint combined force The JFC and the IA, NCA, NMS and the Congress



Annex A
Appendix A
Enclosure A

A-A-A-1

ICAF, NWC, and JAWS offer single-phase JPME

APPENDIX – B

JOINT QUALIFICATION CRITERIA AND POINTS FORMULA

<i>LEVEL</i>	<i>CRITERIA</i>
<i>I</i>	a. Awarded upon joint certification of pre-commissioning <u>and</u> basic officer course completion. -- These courses provide learning objectives dealing with “Joint Introduction and Awareness”. b. Junior Officers are focused on Service competencies. c. Qualification points begin to accrue following commissioning via opportune joint experiences, joint training, joint exercises, and other education.
<i>II</i>	a. Awarded upon completion of JPME I, accrual of 18 points, and certification by the CJCS. b. A minimum of 12 points must come from “Joint Experience” c. Additional points may be derived from joint experience, joint training, joint exercises, and other education
<i>III</i>	a. Awarded upon completion of JPME II or AJPME (Reserve Component officers), accrual of 36 total points, and certification by the Secretary of Defense or his designee. b. A minimum of 12 “Joint Experience” points must have accrued since award of Level II c. Additional points may be derived from joint training, joint exercises, and other education d. Formal designation: Joint Qualified Officer (JQO) e. Effective 30 Sep 2008, JQO required for appointment as an O-7 (AC Only)
<i>IV</i> <i>G/FO Only</i>	a. Awarded upon completion of CAPSTONE, accrual of 60 total points, and certification by the Secretary of Defense or his designee. b. A minimum of 24 additional “Joint Experience” points accrued from an assignment in a G/FO joint billet in OSD/JS/COCOM HQs/JTF HQs/Defense Agency

Point Accrual Formula

$$\text{JOINT QUALIFICATION LEVEL} = \text{JOINT EDUCATION} + \text{EXPERIENCE Pts} + \text{OTHER Pts}$$

$$\text{Joint EXPERIENCE Points} = \text{Duration (Months)} \times \text{Environment Factor}^*$$

*Combat: 3, Non-Combat: 2, Steady-state: 1

$$\text{OTHER Points} = \text{Education} + \text{Training} + \text{Exercise}$$

Education / Training = degree or certification related to "Joint Matters" [Pts TBD]

Exercise Points = Role [Participant (1pt), Planner (2pts), Leader (3pts)]

APPENDIX – C

GLOSSARY

AJPME: Advanced Joint Professional Military Education (AJPME) at JFSC is a Reserve Component (RC) course similar in content, but not identical to, the in-residence JFSC Phase II course. AJPME students shall be JPME Phase I graduates. AJPME educates RC officers and builds upon the foundation established in JPME Phase I. It prepares RC officers (O-4 to O-6) for joint duty assignments. (CJCSI 1800.01C, 22 December 2005)

CAPSTONE: A mandated 6-week course for newly selected G/FOs. The course objective is to make these individuals more effective in planning and employing US forces in joint and combined operations. The CAPSTONE curriculum examines major issues affecting national security decision-making, military strategy, joint and combined doctrine, interoperability and key-allied nation issues. (CJCSI 1800.01C, 22 December 2005)

Civilian Experience: Specific capabilities - Knowledge, Skills and Abilities (KSAs) acquired through the continuum of a civilian career. Civilian acquired KSAs must be valued and evaluated for relevance to the definition of Joint Matters and joint doctrine.

Distance Education: Learning situation in which the instructor and/or students are separated by time, location, or both. Education or training, courses are delivered to remote locations via synchronous or asynchronous means of instruction, including written correspondence, text, graphics, audio- and videotape, CD-ROM, distributed online learning, audio- and videoconferencing and fax. Distance education does not preclude the use of the traditional classroom. The definition of "distance education" is usually meant to describe something, which is broader than and entails the definition of e-learning. (CJCSI 1800.01C, 22 December 2005)

Education: Education conveys general bodies of knowledge and develops habits of mind applicable to a broad spectrum of endeavors. (CJCSI 1800.01C, 22 December 2005)

E-learning: Broad definition of the field of using technology to deliver education and training programs. It is typically used to describe media such as DVD, CD-ROM, internet, intranet, or wireless learning. (CJCSI 1800.01C, 22 December 2005)

Global Force Management (GFM). GFM aligns force apportionment, assignment, and allocation methodologies in support of the National Defense Strategy and joint force availability requirements. It provides senior decision makers a process to assess quickly and accurately the impact and risk of proposed changes in forces/capability assignment, apportionment, and allocation. The data initiative associated with GFM directed in "Strategic Planning Guidance, 2006-2011" is an effort within the Department of Defense to formulate a strategy and systems for organizing data to better support the GFM process.

Intensity. Degree, magnitude or difficulty to which a particular joint task, assignment, or environment provides joint exposure. (e.g., Assignment to a warfighting COCOM staff may

provide a high level of intensity while a routine staff assignment may provide a lesser level of intensity.)

Joint Acculturation: Familiarization with the joint working environment for a duration and intensity that allows understanding and working knowledge of joint operations and sister service culture(s); member's primary job duty or extended/repeated exposure to joint environment.

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

Joint Duty Assignment: An assignment which provides significant experience in joint matters as defined by title 10 USC, sec 668. There are two types of JDAs.

1. Standard Joint Duty Assignment (S-JDA): An assignment that meets the tour length requirement prescribed in title 10 USC, sec 664(a).
2. Experience-based Joint Duty Assignment (E-JDA): Such other assignments and experiences that demonstrate an officer's mastery of knowledge, skills, and abilities in joint matters, as determined under such regulations and policy as prescribed by the Secretary of Defense. E-JDAs may be shorter in duration; therefore, they may be aggregated to achieve the equivalent of a full tour of duty in an S-JDA.

Joint Individual Training (JIT): Training offered to prepare individuals to perform duties in joint organizations or to operate uniquely joint systems (e.g., joint deployable (J2) intelligence support system) and can be joint academic courses or other organizational training conducted by the Office of the Secretary of Defense, combat support agencies, combatant commands, Services, Reserve Forces, or the National Guard. (Derived from CJCSI 1800.01C, 22 December 2005, and Joint Training Policy)

Joint matters [Title 10, sec 668 as amended by NDAA 2007 sec 519; effective 1 Oct 07]

- (1) ...matters related to the achievement of unified action by multiple military forces in operations conducted across domains such as land, sea, or air, in space, or in the information environment, including matters relating to –
 - (A) national military strategy;
 - (B) strategic planning and contingency planning;
 - (C) command and control of operations under unified command;
 - (D) national security planning with other departments and agencies of the United States; and

- (E) combined operations with military forces of allied nations.
- (2) In the context of joint matters, the term “multiple military forces” refers to forces that involve participants from the armed forces and one or more of the following:
 - (A) Other departments and agencies of the United States.
 - (B) The military forces or agencies of other countries.
 - (C) Non-governmental persons or entities.

Joint Officer Development: a process to produce the largest possible body of fully qualified and inherently joint officers for joint and staff responsibilities by cultivating an officer's service competencies and transforming them into joint capabilities through Joint Professional Military Education, training, experiences and self-development. (*CJCS Vision for Joint Officer Development, November 2005*)

Joint Officer Management: the method for managing officers through the continuum of joint experiences, including developmental and joint assignments, along with joint training. Provides the mechanism for tracking joint experiences and qualifications.

Joint Professional Military Education (JPME): A CJCS-approved body of objectives, outcomes, policies, procedures and standards supporting the educational requirements for joint officer management. (CJCSI 1800.01C, 22 December 2005)

JPME Phases – Joint Professional Military Education is a three-phase approach to professional development in joint matters consisting of JPME I, JPME II, and the Capstone course which meet JPME criteria and are accredited by the Chairman of the Joint Chiefs of Staff.

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

Joint Qualified Officer (JQO): Replaces legacy term "Joint Specialty Officer (JSO)" by taking into consideration the level, or amount, of joint experience attained by an officer through assignments, education, training, exercises and self-development. Currency, frequency, and intensity are also factors in assessing qualification levels. Officers must complete JPME II (AJPME is acceptable for RC officers only) to be eligible for the JQO designation. An officer must be in the grade of O-4 or above to be designated as a JQO.

Joint Training: Training, including mission rehearsals, of individuals, units, and staffs using joint doctrine or joint tactics, techniques, and procedures to prepare joint forces or joint staffs to respond to strategic, operational, or tactical requirements considered necessary by the Combatant Commanders to execute their assigned or anticipated missions. Joint Training involves forces of two or more Military Departments interacting with a combatant command or subordinate joint force commander, and involves joint forces, joint staffs and/or individuals preparing to serve on a joint staff or in a joint organization and is conducted using joint doctrine.

Reference: (a) Title X USC, PUBLIC LAW 108-375, FY05 National Defense Authorization Act, 28 October 2004; (b) CJCSI 1800.01C, *Officer Professional Military Education Policy*, 22 December 2005; (c) CJCSI 3500.01C, *Joint Training Policy and Guidance for the Armed Forces of the United States*, 15 March 2006

Participation Descriptors:

Leader - Exercises formal authority and direction over significant organizational elements or major tasks.

Planner - Serves as the focal point for an activity or organization. Empowered to speak on behalf of their organization and make commitments for specified support. There can be more than one.

Participant - A person actively involved in an event capable of making positive contributions to the mission.

Self-development: The continuous and deliberate process of engaging in learning activities used to enhance and improve one's depth of knowledge, capabilities, and potential in joint matters. Its objective is to provide a means for acquiring enhanced knowledge, understanding, performance, and competence beyond that developed, or experienced in an organization. [*Learning activities can include active participation in seminars, forums, working groups, and other verifiable activities that align with and support the objective of developing and improving joint capabilities.*]

APPENDIX – D
ACRONYMS

SYMBOL	DEFINITION
AC	Active Component
AJPME	Advanced Joint Professional Military Education
CJCS	Chairman of the Joint Chiefs of Staff
CJCSI	Chairman of the Joint Chiefs of Staff Instruction
COCOM	Combatant Command
CY	Calendar Year
DL	Distributed Learning
DMDC	Defense Manpower Data Center
DoD	Department of Defense
DoDI	Department of Defense Instruction
FY	Fiscal year
GFM	Global Force Management
GNA	Goldwater-Nichols Department of Defense Reorganization Act of 1986
G/FO	General/Flag Officer
JDAL	Joint Duty Assignment List
JIT	Joint Individual Training
JOD	Joint Officer Development
JOM	Joint Officer Management
JPME	Joint Professional Military Education
JQO	Joint Qualified Officer
JQS	Joint Qualification System
JSO	Joint Specialty Officer
NDAA	National Defense Authorization Act
ODUSD(MPP)	Office of the Deputy Under Secretary of Defense (Military Personnel Policy)
OSD	Office of the Secretary of Defense
RC	Reserve Component
USC	United States Code
USJFCOM	United States Joint Forces Command

APPENDIX – E

OBJECTIVES

OF

THE STRATEGIC PLAN FOR JOINT OFFICER MANAGEMENT AND JOINT PROFESSIONAL MILITARY EDUCATION

Strategic Objectives

Develop a JOM system relevant to 21st Century mission and force structure requirements.

Produce the largest possible body of fully qualified and inherently joint officers suitable for joint command and staff responsibilities.¹⁵

Develop a pool of fully qualified and inherently joint leaders for promotion to general/flag officer rank. ¹⁷

Maintain the quality of officers in joint assignments.

Action

Increase flexibility in the established management assessment mechanisms, practices, policies, and statutes which act as controlling influences on joint operations and personnel.

Enhance methods for delivering joint education, training, and experience across the spectrum of grades and specialties by establishing a joint learning continuum of four interdependent supporting pillars.¹⁶

Ensure officers are strategically minded, critical thinkers who are skilled in those capabilities specific to joint warfighting. Shift focal point to growing the largest possible number of fully qualified and inherently joint colonels and captains.

Develop more robust tracking and management system for officer joint qualifications/competencies and directly link Service systems supporting assignment selection.

¹⁵ CJCS Vision for Joint Officer Development (JOD), November 2005.

¹⁶ CJCS Vision for JOD Vision identifies the four pillars as: Joint Individual Training, Joint Professional Military Education, Joint Experience, and Self-development.

¹⁷ A natural evolution of the original objective of the GNA which was to ensure that general and flag officers are well-rounded in joint matters.