



Army Chief of Staff talks with military senior Service college students at Harvard University

U.S. Army (D. Myles Cullen)

# BURGEONING COURSES, LAGGING STANDARDIZATION

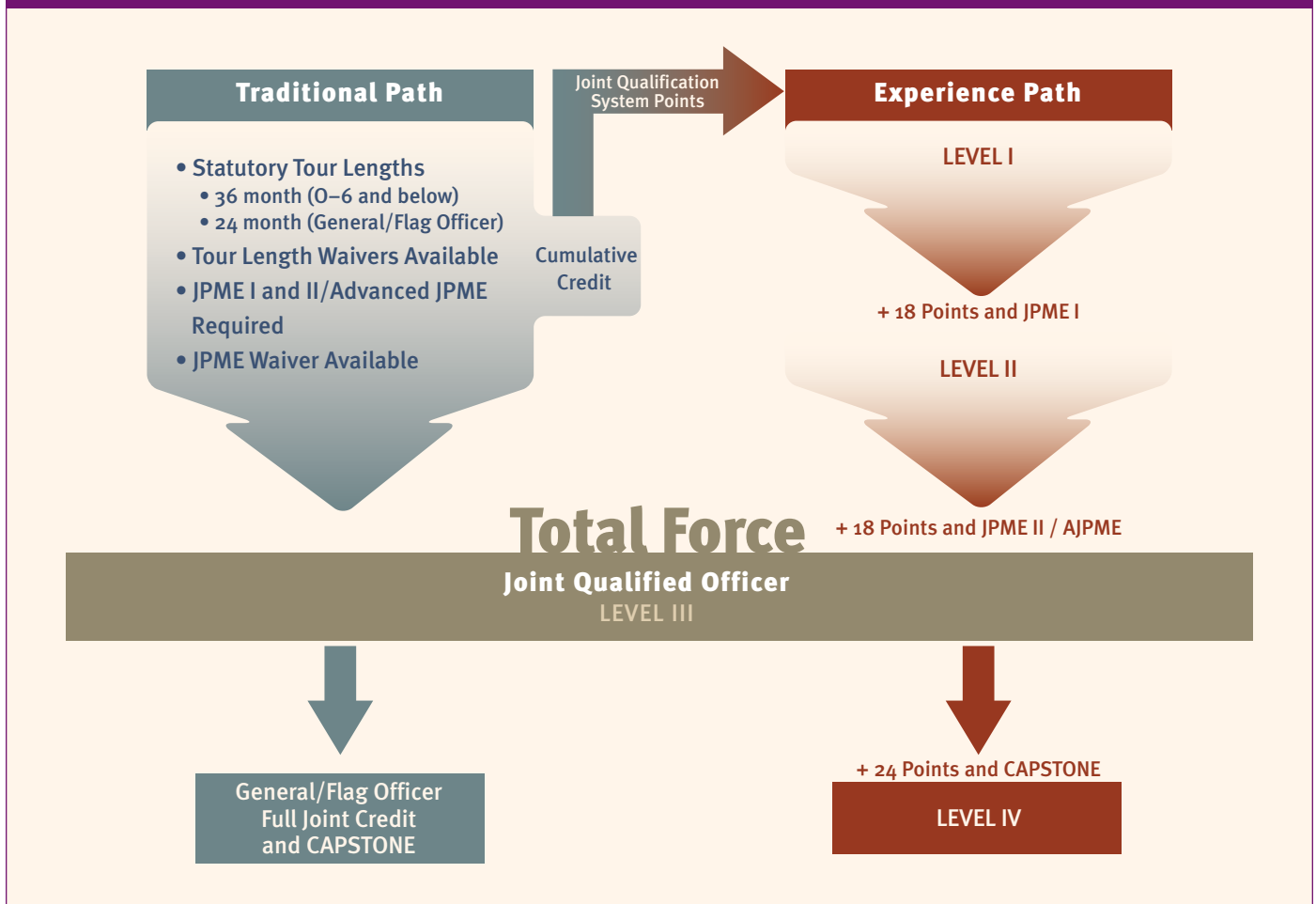
By SYDNEY M. SAVION *and* TERRANCE J. MCCAFFREY

**S**ince the advent of the Goldwater-Nichols Department of Defense Reorganization Act of 1986, the requirements for and approaches to joint training and education have morphed across the joint learning continuum. Goldwater-Nichols was hailed as “one of the landmark laws in American history” by then-Congressman Les Aspin. The act aimed to enhance joint operational effectiveness and spawned standards for joint officer management, joint doctrine, and joint training and education policies. To get the joint force qualified to execute these duties, individual and collective prepara-

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Figure. Joint Qualification Level = Joint Education + Experience Points + Other Points



tion within the joint learning continuum includes joint training, joint professional military education (JPME), joint experience, and self-development.<sup>1</sup>

Twenty-four years after Goldwater-Nichols, the methods to establish joint qualification are described in the Chairman of the Joint Chiefs of Staff (CJCS) Vision for Joint Officer Development, signed in November 2005, and spelled out in Department of Defense (DOD) and CJCS policy. Two policy documents that specifically influence joint education and training are the "Officer Professional Military Education Policy" (OPMEP/ CJCS Instruction 1800.1D), which guides JPME, and the "Joint Training Manual" (JTM/CJCS Memorandum 3500.03B), which governs joint training. The OPMEP clearly defines standards for formal officer education in the collective JPME institutions and Service academic institutions, while the JTM lays out the framework for joint individual learning course certification as an annex. The JPME program is further guided and accredited by

a well-defined Process for the Accreditation of Joint Education (PAJE), prescribed in the OPMEP and designed to provide oversight, assessment, and process improvement to the JPME institutions.

These policies served well under the rigid standards subject to the joint staff officer (JSO) program that required JPME I, JPME II, and a specified joint tour be completed before a boarding process that chose the best qualified joint officers for JSO designation. The demand for joint qualified officers (JQOs) to perform more and more joint functions, however, has caused the system to change because it was found unable to meet the needs of the warfighter.

What has emerged is the implementation of the JQO program, which replaced the JSO program stipulated by Goldwater-Nichols (see figure). This program, outlined in the 2005 CJCS Vision and corresponding policy, recognized that joint credit should be applied where jointness is experienced, opening up opportunities for joint experience credit to be

gained for experiences not on the joint duty assignment list and associated points for non-JPME education and training completed. This process is codified in DOD Instruction 1300.19, "DOD Joint Officer Management Program," and CJCS Instruction 1330.05, "Joint Officer Management Program Procedures," upon legislative authority granted in the fiscal year 2007 National Defense Authorization Act (NDAA).

In this system, however, comprehensive training and education guidelines for the Joint Individual Learning Enterprise (JILE) level are missing. JILE is a novel term used to describe the collective of non-JPME courses that fall outside the purview of the policies prescribed for JPME. Regardless of rigor, non-JPME courses do not serve as a substitute for extant JPME I and JPME II requirements, but supplement the system and enhance individual joint portfolios, including contributions to gaining JQO Level II status.

Since the JQO system now allows for alternate paths to gain joint credit outside of the original Goldwater-Nichols path, joint

training requirements and novel joint officer development opportunities have emerged. Although many non-JPME courses existed before NDAA fiscal year 2007 provided new authority for application of courses for credit toward JQO levels, we have seen a burgeoning array of courses developed by combatant commands, Services, combat support agencies, PME/JPME institutions, and other entities targeted at meeting individual and commander needs for joint experience, training, and education in addition to the traditional JPME formal lanes. Moreover, these courses seem to satisfy ad hoc joint training requirements under well-intended but seemingly uncoordinated efforts to serve individuals in their joint professional development. The problem that stems from such activity is the *absence of standardization* across the entire JILE for the development, assessment, and certification/accreditation of these non-JPME courses.

### Non-JPME Courses Defined

To understand what non-JPME courses are, we must first know what constitutes JPME. Joint professional military education is comprised of precommissioning, primary, intermediate, senior, and general officer/flag officer military educational programs that are certified or accredited under the provisions of the rigorous PAJE, which is guided by widely accepted civilian accreditation standards and practices adapted to satisfy JPME requirements.<sup>2</sup> It is in essence the process of assessing the quality of education including learning objectives, criteria and standards, and quality instructors. Moreover, many of the JPME institutions are accredited by civilian regional accreditation systems and grant Master's degrees upon successful completion of the course of study.

Generally, when we think of the *E* in JPME, we think of only the intermediate and senior Service school programs, as opposed to other non-JPME education and training. However, most academic courses developed invariably include elements of both training and education, given that the OPMEP states, "Training and education are not mutually exclusive. Virtually all military schools and professional development programs include elements of both education and training in their academic programs."<sup>3</sup> *Training* is defined as instruction and applied exercises for acquiring and retaining skills, knowledge, and attitudes required to complete tasks, and *education* conveys general bodies of knowl-

edge and develops habits of mind applicable to a broad spectrum of endeavors.<sup>4</sup> Non-JPME courses are those developed outside this formal structure of the JPME system and guidelines and instead are developed under the guise of "training" under the JTM.

Added to these highlighted differences between JPME and non-JPME education are limitations on the ability to attend JPME, such as officer nonselection, career timing, and physical school throughput issues. Regardless of these real limits on the system, there is a growing demand by commanders for officers to acquire joint competence at earlier stages

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in their careers. There is also a desire for field grade officers to have already attended JPME and to have mastered the joint training and education milestones prior to arriving at their joint assignment because, traditionally, the only place officers acquire any significant degree of joint education is from the JPME process.<sup>5</sup> That said, studies suggest that the current model of when officers receive JPME may not be optimum. The bottom line is that there is a huge disparity between the analysis, design, development, implementation, evaluation, and overall quality of JPME courses and the non-JPME courses available on an ad hoc basis to the joint warfighter.

A related problem is that both the former JSO and current JQO programs require officers to complete JPME Phase II. Although there is no requirement for JPME II completion for most joint billets,<sup>6</sup> the education provided at the Joint Forces Staff College (JFSC) is specifically tailored to the needs of JSO duty. The issue is that throughput is a serious limitation since current Title 10 U.S. Code requires that JPME II be conducted *in residence*. JPME II credit can now be obtained at either at JFSC (including the Joint and Combined Warfighting School or Joint Advanced Warfare School), one of the senior-level Service colleges, the National War College, or the Industrial College of the

Armed Forces. Although this list seems to offer an abundance of opportunity, the only school that services officers in the junior field grade ranks that fill many joint jobs is JFSC. The Services do a great job of filling available JFSC seats, but the physical capacity of the college or the requirements of the Services often prevents officers from attending JPME II prior to arriving at their joint duty assignments. When this does occur, commands must go without individuals for 10 weeks if they desire the officer to get the education or be eligible to fulfill JQO Level III requirements during the officer's joint tour.<sup>7</sup> This can happen in the middle of the joint tour, or the really inefficient timing at the end of the tour that gaps the position for the same period before an individual departs.

Given the ongoing prosecution of two wars, the current operational tempo of the Services significantly affects the availability of officers to attain JPME I or II prior to a joint assignment. Once an officer is assigned to a joint task force (JTF), it is less likely he will attain any joint skills desired through JPME, but rather will attain some level of joint education or training through on-the-job training or distance learning without necessarily gaining joint credit. This in and of itself exacerbates the dilemma for the commander. Qualified people are needed, but he cannot send them to get the requisite education and training through the traditional schoolhouse method. Moreover, the current solutions to the problem seem to be laser focused on intermediate- and senior-level education even though policies such as the OPMEP equally illuminate precommissioning and primary level JPME where many of these issues can actually gain traction. Until the timing and throughput of attending JPME schools are reconciled, officers will seek other venues for joint education or training and operational joint experience to attain the maximum number of JQO points to meet part of the criteria toward JQO status. Granted, this may not be wholly achieved without having completed the applicable level JPME, but the commander still requires individuals to be capable of operating in a joint environment regardless of their formal education.

What has become disconcerting is the discovery that the quality of many of the non-JPME courses fails to rise to the pedigree equal to or greater than those courses accessed under PAJE. This is mainly due to the fact that there is a lack of standardization

and enhanced evaluation criteria to ensure the quality of courses offered and submitted for joint certification. Additionally, many courses labeled joint have not gone through the certification process codified in CJCS Memorandum 3500.03B, nor are there plans from their sponsors to do so even though a system to certify them exists.

The process for non-JPME courses to gain joint certification is currently captured in the JTM, Enclosure H.<sup>8</sup> This applies to all organizations that provide joint individual learning content. However, this process is not widely known or sufficient in depth and breadth of assessment to ensure courses are developed with the quality and standardization required of certification. Until recently, this process was comprised of five certification criteria by which a course submitted for joint certification is assessed:

- content must meet a joint training requirement
- content should not conflict with joint doctrine
- joint training objectives must link to current Universal Joint Task List (UJTL)
- media must incorporate assessment of each trainee to track achievement of the training objectives
- media must support content assessment as part of the life cycle management.<sup>9</sup>

With the exception of the joint doctrine and UJTL criteria, these five criteria have been the subject of extremely broad interpretation and have not significantly ensured that proper quality control is achieved. Given the increasingly complex joint operating environment, the emphasis on adaptive joint individual training and education to prepare individuals to perform duties in joint operations continues to grow. This lends even more credence to ensuring the quality and standardization of non-JPME course development and assessment.

### Importance of Standardization

In a military context, Joint Publication 1-02, *DOD Dictionary of Military and Associated Terms*, defines *standardization* as:

*the process by which the DOD achieves the closest practicable cooperation among the Services and DOD agencies for the most efficient use of research, development, and production*

*resources, and agrees to adopt on the broadest possible basis the use of: a. common or compatible operational, administrative, and logistic procedures; b. common or compatible technical procedures and criteria; c. common, compatible, or interchangeable supplies, components, weapons, or equipment; and d. common or compatible tactical doctrine with corresponding organizational compatibility.*<sup>10</sup>

Standards offer individuals who develop courses a formal convention, as well as some level of concordance with learning objectives, instruction, and evaluation. In addition, standards provide learners (that is, warfighters) quality course content that they can trust in terms of a level of standards, testing, definitions, practices, and procedures. Equally important is bridging course development with the needs of the individual learner and the requirements of the joint position itself. The skills that individuals need to execute their joint duty should be based on the requirements of their assignments and the commands' roles and responsibilities. So far, however, these requirements have not been established through individual training UJTLs or another type of system that matches skills needed to joint duty position. This would go a long way to supporting development of the right type of courses needed across the JILE.

Today, hundreds of non-JPME courses exist and many do not meet even the most basic joint criteria, though the prefix still gets assigned to the courses by the office of primary responsibility (OPR). *Joint*, in the purest sense of the definition, denotes activities, operations, organizations, and so forth, in which elements of two or more military departments participate.<sup>11</sup> In the context of individual joint training, joint courses should prepare individuals to perform duties in joint organizations or to operate uniquely joint systems, and ensure individuals have and are proficient in the joint competencies and skills to apply doctrine and procedures necessary to function as staff members.<sup>12</sup>

The goal of a JILE-wide certification program is to ensure that the training and education courses touted as joint, developed and offered by organizations within the joint training community, rise to the level of pedigree considered as equivalent in quality to courses that are reviewed under the PAJE process. The joint warfighter is relying on the institution and the OPR to ensure the integrity of the courses offered to enhance

knowledge and the ability to gain JQO credit. What is lost on those developing non-JPME courses is the value to the learner, quality of the course content, and the effectiveness of the instruction whether delivered via distance learning or in traditional classrooms.

### Toward Standardization

A course should be developed as a result of a joint training requirement, but it should also be focused on the desired learning outcomes for the warfighter. Moreover, as Stephen Covey purports, one should always begin with the end in mind.<sup>13</sup> The end result of developing and implementing a course should be evidence of a relatively permanent change in behavior for the joint warfighter who has taken a course. The learning joint warfighters received must be effectively employed in their joint assignments.

Bloom's taxonomy is a widely accepted framework for learning objectives comprised of affective, psychomotor, and cognitive

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domains that must be accounted for in the warfighter's learning program. In addition, standardization of how non-JPME courses are analyzed, designed, developed, implemented, and evaluated is vital. Using the appropriate taxonomy along with standardized educational methods ensures effective course development and supports the warfighter gaining/applying new knowledge, behaviors, skills, values, understanding, and syntheses of myriad data in a complex environment.

Standardization serves to strengthen the knowledge and experience of the learner. Moreover, it ensures that courses developed and certified as joint result in sound and consistent levels of knowledge, and that individuals are able to perform the same types of tasks in joint and coalition task forces.

Enhanced DOD standardization sets in motion a granular framework for consistency. It should be comprised of a systematic approach that includes analysis, design, development, implementation, and evaluation.<sup>14</sup> Moreover, it must inculcate related doctrine and operational lessons learned and applied.



Analyzing the joint education environment would allow the OPR to identify the problem, settle on a suitable solution, isolate the joint training requirement driving course development, and identify/examine courses that may already exist to satisfy the requirement. Design would inform the intended outcome of the course and establish appropriate learning objectives. In essence, design answers what we intend the warfighters to understand or achieve through the course. Development informs the course resources, appropriate pedagogy, and requisite qualifications needed to be an instructor if one is required. Finally, implementation and evaluation provide the OPR a process by which the course is continuously validated to satisfy the joint training requirement while maintaining doctrinal currency and operational relevancy. U.S. Joint Forces Command (USJFCOM) is developing a system to assist with all of the above.

*course certification is fundamental to a course becoming eligible for joint qualified officer points*

### Certification Process

People often use certification and accreditation interchangeably. However, in the context of joint professional development, they have different meanings. *Accreditation* is the overall formal process of evaluating JPME schools. *Certification* is a CJCS-mandated standard process to ensure individual learning courses are technically evaluated and meet documented, rigorous certification criteria throughout their lifecycle. While no method is infallible, the key is standardization in which all courses submitted are reviewed using the same criteria for assessment. Course certification is fundamental to a course becoming eligible for JQO points. Through the JTM, Enclosure H, the Chairman established guidance and standards to distinguish course content that is eligible (or not) for JQO points. CJCS has prescribed criteria that non-JPME courses (also known as individual learning courses) must satisfy for point eligibility toward JQO designation levels.

The individual joint training and education certification process goes through five steps:

1. Initiation. The joint certification process for institutional learning, distance

learning, and blended learning courses begins when the OPR submits a course certification Request for Service on the Joint Investment Database.

2. Validation. A validated course certification request is where all items on the form are complete and the primary certifier's questions have been answered.

3. Course Content Review. The course is reviewed using the newly revised eight certification criteria, by cross-checking the certification request against the supporting course documents and filling out a Joint Course Certification.

4. Database Entry. The course is entered into the Joint Knowledge Services Database with certification date as "Accepted."

5. Joint Course Certification Package. The certification criteria and the findings of the certification review are documented.

### Methodology of Review

Organizations requesting certification will submit documentation demonstrating qualification for joint course certification. The method of review used in the joint course certification process for new or existing training content is qualitative based on the following eight criteria, which USJFCOM submitted to the Joint Staff for approval (which it recently granted):<sup>15</sup>

1. Content must meet a joint training requirement that supports a joint operational need as identified in the USJFCOM Joint Training Plan, a combatant commander's joint training plan, or any other strategic authoritative joint document.

2. Content must be in accordance with current joint doctrine.

3. Learning objectives must link to current UJTLs.

4. Course must have an assessment that tests and documents learner achievement of objectives.

5. Course must have a lifecycle maintenance plan.

6. Course should support the interest of two or more military departments and be accessible to all Service personnel that meet course requirements.

7. Joint course instructors must possess relevant experience and knowledge of joint operations and/or activities related to the course.

8. Course should not duplicate existing material.

Joint course certification ensures quality, competency, and qualifications in support of preserving the joint moniker. It ensures individual learning courses are additive to an individual's capability in joint operations. It appropriately assesses courses developed as joint for JQO point eligibility qualification.

In addition to these process improvements, USJFCOM is pushing initiatives that establish new policy describing the JILE and the above processes, promoting the JILE through engagement and endorsement with the Joint Staff J7 and the JILE community at the biannual Joint Worldwide Training and Scheduling Conference, and developing a new registrar system to document individual accomplishments in fulfillment of DOD Instruction 1300.19 and CJCS Instruction 1330.05 JQO point requirements. All of these ongoing initiatives should create a standardized and certified JILE program that enhances the warfighter and allows individuals to gain quality credit toward their elected path to JQO qualification.

### Implications

It is widely understood that joint doctrine consists of fundamental principles that guide the employment of U.S. forces in coordinated action toward a common objective. The purpose of joint doctrine is to enhance the operational effectiveness of U.S. forces. Joint doctrine provides the foundation for building a culture and basis for training and instructional material for professional military education.<sup>16</sup> Establishing guideposts for the quality expected of JILE course content ensures courses are developed giving the full range of consideration for incorporating joint doctrine, validated concepts, lessons learned, and best practices currently in the field. Without consistent standards consistently applied across the JILE, we leave a gaping hole in the development of officers, decreasing our joint force capabilities and our advantage over the adversary.

Courses developed for the individual learner also must possess an operational application for the joint and coalition task force. The implication of a course's operation application weighs greatly on the outcome of achieving engagement and military objectives. This is vital given that we are faced with ever more complex environments and adaptive adversaries. Training and education should be developed with

the highest standards to ensure that joint warfighters are wholly prepared to execute and operate across the spectrum of joint operations. As Joint Publication 1, *Doctrine for the Armed Forces of the United States*, is in revision and there is a new proposal for joint doctrine development to codify the joint officer development program, the time to define the context and programs that make it happen is now.

A benefit of non-JPME courses is access. Not all officers will be able to attend in-residence JPME due to nonselection, timing, or operational tempo. Non-JPME courses do not serve as a substitute for extant JPME I and JPME II requirements. However, they offer individuals the flexibility of choosing varied modes of pedagogy (online, classroom, virtual) to gain specific knowledge ensuring effectiveness in the joint operating environment. Individual learning courses also offer varied accessibility to individuals who may not otherwise be able to attain the training due to lack of proximity or other obstacles.

Non-JPME courses are an integral element of our current and future readiness, but their value added can only be as good as the content. While USJFCOM has made great strides in cataloging and certifying many courses as joint, the command is in the process of refining joint individual training standards and processes to improve the rigor and quality of the non-JPME courses developed. The net effect of this USJFCOM initiative will be an expanded capability to certify a wider array of quality courses as joint and to ensure the course development and certification process is more standardized. Joint certified courses will be eligible for points toward designation as joint qualified officers. The end result is to make an enduring difference in the quality of the course content, to increase the value of learning and availability to the joint warfighter, and to preserve the “joint” prefix for those courses that rise to the level of pedigree deserving of its use. **JFQ**

## NOTES

<sup>1</sup> See Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 3500.01E, “Joint Training Policy and Guidance for the Armed Forces of the United States,” Enclosure A, “Introduction” (May 31, 2007), A3.

<sup>2</sup> CJCSI 1800.01D, “Officer Professional Military Education Policy (OPMEP),” Enclosure F, “Process for Accreditation of Joint Education (PAJE)” (July 15, 2009), F1.

<sup>3</sup> CJCSI 1800.01D, Enclosure A, “Officer Professional Military Education Policy” (July 15, 2009), A2.

<sup>4</sup> See CJCSI 3500.01E, A3.

<sup>5</sup> A. Kent Schweikert, “Joint Professional Military Education: Timing Is Everything, Getting the Commander What He Needs” (Thesis, Naval War College, 2004).

<sup>6</sup> JPME II completion is a requirement, however, for JQO Level III designation, which is required for promotion to general/flag rank or to fill “joint critical” billets.

<sup>7</sup> Ibid.

<sup>8</sup> Ibid.

<sup>9</sup> See CJCS Memorandum (CJCSM) 3500.03B, “Joint Training Manual for the Armed Forces of the United States,” Enclosure H, “Joint Individual Learning Content Certification Process” (August 31, 2007), H3.

<sup>10</sup> See Joint Publication (JP) 1–02, *Department of Defense Dictionary of Military and Associated Terms* (Washington, DC: The Joint Staff, October 17, 2008), 517.

<sup>11</sup> Ibid., 285.

<sup>12</sup> See CJCSM 3500.03B, Enclosure G, “Individual, Staff, and Collective Joint Training” (August 31, 2007).

<sup>13</sup> Stephen R. Covey, *Seven Habits of Highly Effective People: Restoring the Character* (New York: Simon and Schuster, 1989).

<sup>14</sup> See *Department of Defense Handbook: Instructional Systems Development/Systems Approach to Training and Education* (Part 2 of 5 Parts), MIL–HDBK–29612–2A, August 31, 2001.

<sup>15</sup> See Director, Joint Staff Memorandum 30603–09, “Joint Individual Learning Certification Criteria” (October 19, 2009).

<sup>16</sup> See CJCSI 5120.02A, “Joint Doctrine Development System” (March 31, 2007).

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