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Goldwater-Nichols and the Evolution of Officer Joint Professional Military Education (JPME)

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Summary

In November 2015, the Senate Armed Services Committee initiated a review of the Goldwater-Nichols Act (GNA). This piece of legislation, enacted in 1986 and amended in subsequent years, led to major reforms in defense organization. The year 2016 will mark the 30th anniversary of this landmark legislation and lawmakers have expressed interest in whether the changes, as implemented, are achieving the goals of the reform, and whether further reforms are needed to achieve current and future national security goals.

One of Congress' main goals of the legislation was to improve joint interoperability among the military services through a series of structural changes and incentives for participation in joint matters. Joint matters, by statute (10 U.S.C. §661) are currently defined as,

...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...

Modifications of the officer management system under the GNA reforms were intended to enhance the quality, experience, and education of joint officers. The law required, for the first time, that officers complete Joint Professional Military Education (JPME) in order to be eligible for certain joint assignments and promotion categories. Some have questioned the extent to which these statutory JPME requirements are achieving the goals of the reform and whether they should be amended or repealed. Others have questioned whether the JPME curriculum, method of delivery and instruction, course structure, and career timing are appropriate in the context of today's strategic environment and force structure needs.

In parallel to congressional efforts, Secretary of Defense Ashton Carter announced in December 2015 that the Department of Defense (DOD) would be launching a review of the department's structure and efficiency in the context of the GNA reforms. A DOD memorandum dated January 4, 2016 outlined the key questions that would be addressed in this review. With respect to the joint officer management system, DOD plans to consider,

1. Do current law and policy governing joint duty qualifications provide the right human capital development to meet our joint warfighting requirements?
2. Are there adjustments that can be made to balance the often competing demands of joint professional development and other specialized expertise or other career development considerations?

A spokesman for DOD indicated that this review might result in internal policy changes and/or legislative proposals. Any reforms to the military personnel management system might also be considered in conjunction with DOD's "Force of the Future" initiative, the first phase of which was launched by Secretary Carter on November 18, 2015. The purpose of this initiative is to improve the department's ability to recruit and retain the talent it needs to adapt to future mission requirements.

Contents

Overview of this Report	1
Joint Military Education Pre-GNA.....	1
Goldwater-Nichols Act: A New Framework for Joint Officer Management.....	2
The “Skelton Panel” and Implementation of Goldwater-Nichols (1987-1990).....	4
Evolution of JPME	4
Roles of Military Schools (1994).....	5
Building a Strategic Approach to JPME and Joint Officer Management (2001 - 2005).....	5
A New Joint Qualification System (2007)	7
Professional Military Education Two Decades after the Goldwater-Nichols Act (2010)	8
Changes to JPME in Recent Congresses.....	9
Acquisition as a “Joint Matter”	10
Other Issues for Congressional Consideration	10

Figures

Figure A-1. Map of in-Residence Service and Joint Colleges and Universities Certified to Provide Joint Professional Military Education.....	14
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Tables

Table 1. Goldwater-Nichols Act Goals and Initiatives for Officer Management	3
Table 2. Joint Qualification Criteria	8

Appendixes

Appendix. Additional JPME Information.....	13
Appendix A. Acronyms	15

Contacts

Author Contact Information	15
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Overview of this Report

The Goldwater-Nichols Act of 1986 led to major changes in officer training and career development through the establishment of a joint management system. This system includes four basic components: Joint Professional Military Education (JPME) in joint schools, a Joint Duty Assignment List (JDAL), Joint Specialty Officer (JSO) designation, and joint criteria for promotions. This report focuses mainly on JPME requirements in the context of the intent of the Goldwater-Nichols reforms. Although it refers to joint officer assignments and promotions, it does not address the joint officer management system as a whole. The first sections provide background on joint education and the changes put in place by GNA. The following sections discuss the implementation and evolution of JPME over the past 30 years. The final section lays out some of the stakeholders' concerns and issues with the current state of JPME that Congress may consider as they conduct their GNA review.

Joint Military Education Pre-GNA

The education of military officers in joint operations predates any legislation requiring both joint education and experience. The Army Industrial College had been established in 1924¹ to educate officers in mobilization, supply, and industrial support, but no similar school was devoted to the study of joint operations. During World War II, following the U.S. military's exposure to working with allies in joint operations, military leaders saw a critical need for officers to be trained and educated in joint and combined operations. To fill this void, the Joint Chiefs of Staff established the Army-Navy Staff College in 1943 to provide a four month course for selected senior officers assigned to unified command and staff duties.² A memo by General Henry H. "Hap" Arnold, then-Commanding General of the Army Air Forces, described the purpose of this War College as:

- (1) To train selected officers of the Army and Navy for command and staff duties with unified (Army-Navy) commands.
- (2) To develop methods and ideas for the most effective unified employment of all arms and services and to translate lessons learned in the field into appropriate doctrines. Conclusions reached should be spread through the services both by service publications and by the influence of the graduates of the College in planning and conducting operations.³

The original Army-Navy Staff College evolved into the National War College in 1946 and the Army Industrial College was later renamed the Industrial College of the Armed Forces (ICAF). The Armed Forces Staff College (AFSC)⁴ was also formed in 1946 to provide joint operational instruction to mid-grade officers (O-4 to O-6). By 1946, and primarily at the initiative of the senior military leadership, there were three military institutions devoted to various aspects of joint education—the National War College, the ICAF, and the AFSC. The services retained their

¹ Established by War Department General Order No. 7, February 25, 1924, at Fort McNair, Washington D.C. It later became the Industrial College of the Armed Forces (ICAF) and is now the Dwight D. Eisenhower School for National Security and Resource Strategy.

² Yaeger, John W., "The Origins of Joint Professional Military Education", *Joint Forces Quarterly*, National Defense University Press, issue 37, April 2005.

³ *Ibid.*, p. 76.

⁴ AFSC was incorporated into the National Defense University in August 1981 and was later renamed the Joint Forces Staff College in October 2000 by Section 913 of the Floyd D. Spence National Defense Authorization Act for Fiscal Year 2001.

service-centric professional military education schools. (A current listing of service and joint colleges and universities certified to provide JPME with geographic locations can be found in **Figure A-1**.)

Nevertheless, for much of the Cold War era, despite the availability of joint courses at these colleges, there was a general lack of enthusiasm among military officers for joint education and joint assignments. In 1981, only 13% of officers assigned to the Office of the Joint Chiefs of Staff had attended the joint course at AFSC and only 25% of O-6s (Colonels or Navy Captains) had graduated from the National War College or ICAF.⁵ Some argued that joint commitments were detrimental to an officer's career as it took them away from service-specific education and assignments that were seen as more valuable for promotion.⁶

Goldwater-Nichols Act: A New Framework for Joint Officer Management

By the early 1980s, a number of unsuccessful joint military operations⁷ including the aborted rescue of American hostages in Iran,⁸ had generated questions by many in Congress about DOD's capability to execute joint operations. On June 16, 1980, during a nomination hearing before the Senate Armed Services Committee, General David C. Jones addressed what he saw as the main impediments to building a joint culture within DOD. One issue area that he raised was the need to "have greater incentives for the best people to go into joint jobs."⁹ Jones' comments sparked a broader reform effort that eventually became the 1986 Goldwater-Nichols Department of Defense Reorganization Act (GNA).

The GNA reorganized the Department of Defense and established the first formal requirements for the services to train and operate in a joint environment. Title IV of the GNA established a number of requirements, guidelines and goals as part of a joint officer management framework. The goals of the GNA in terms of personnel management were threefold: improving the (1) quality, (2) experience, and (3) education of joint officers (see Table 1).

Under this framework established by GNA, completion of specific requirements for JPME, along with joint experience gained through assignments from the joint duty assignment list (JDAL), could result in joint qualification and designation as a joint specialty officer (JSO). The connection between joint criteria and promotion potential was intended to incentivize officers to qualify as JSOs. The designation of an officer as a JSO signified proficiency in "joint matters."

⁵ Lederman, Gordon, Nathaniel, *Reorganizing the Joint Chiefs of Staff: The Goldwater Nichols Act of 1986* (Greenwood Publishing Group, 1999), p. 43.

⁶ *Ibid.*, p. 43.

⁷ For example, some have cited the inadequate unity of command in the 1968 seizure of the USS *Pueblo* by North Korea, and poor decision-making in the attack of Koh Tang Island off the coast of Cambodia where American forces suffered 18 dead and 50 wounded without achieving a single military objective. For additional background, see chapter one of Locher, James R III., *Victory on the Potomac; The Goldwater-Nichols Act Unifies the Pentagon*, Texas A&M Press, College Station, 2002.

⁸ The joint mission, code-named Operation Eagle Claw, was aborted when only 6 of 8 helicopters arrived at the rendezvous point labeled "Desert One". Upon departure, a helicopter collided with a C-130 resulting in the deaths of 8 servicemembers.

⁹ U.S. Congress, Senate Committee on Armed Services, *Nomination of David C. Jones*, Hearing before the Committee on Armed Services, 96th Cong., 2nd sess., June 16, 1980.

Table I. Goldwater-Nichols Act Goals and Initiatives for Officer Management

Goals	GNA Policy Initiatives
Select more talented (quality) officers for joint duty assignments	<ul style="list-style-type: none"> • Require SECDEF to establish qualifications for Joint Specialty Officers (JSOs). • JSO promotion rates not less than rate of officers on service headquarters staff • JSOs make up approximately 50% of JDAL positions • All officers selected for general/flag officer (G/FO) rank must have served in a joint duty assignment
Increase the joint experience level of officers in joint assignments	<ul style="list-style-type: none"> • Prospective JSOs must successfully complete a full tour in a joint billet • At least 1,000 Joint Duty Assignment List billets designated as “critical” and filled by JSOs • Specified tour lengths for joint duty assignments (2 years for G/FOs and 3 years for other officers)
Provide appropriate education for joint officers	<ul style="list-style-type: none"> • Strengthen joint education for all officers • Require JSOs to complete joint education at a JPME school before joint assignment • Require G/FOs to attend a joint Capstone course

Source: Table derived from U.S. Congress, House Committee on Armed Services, *Report of the Panel on Military Education of the One Hundredth Congress*, committee print, 100th Cong., 1st sess., April 21, 1989 (Washington: GPO, 1989), p. 50-51.

Goldwater-Nichols focused on the effective management of military officers who were “particularly trained in, and oriented toward, joint matters.” While JPME curriculum was not specifically defined, the legislation did define “joint matters” as “matters relating to the integrated employment of land, sea, and air forces.”¹⁰ JPME requirements are noted in two sections of the original legislation:

- Section 661 (Management policies for Joint Specialty Officers) required successful completion of a JPME program prior to an officer being nominated for joint qualification or being assigned to a joint duty position, with minor exceptions.
- Section 663 (Education) contained additional requirements specifically related to JPME. It required (1) attendance at a Capstone Course for all new generals and flag officers, (2) periodic review of the curriculum for the National Defense University and other JPME schools by the Secretary of Defense with advice and assistance from the Chairman of the Joint Chiefs of Staff (CJCS), and (3) review of service schools’ curricula to strengthen the focus on joint matters and to ensure that graduates were adequately prepared for joint duty assignments.

¹⁰ P.L. 99-433.

The “Skelton Panel” and Implementation of Goldwater-Nichols (1987-1990)

On November 13, 1987, Representative Les Aspin, then-Chairman of the House Armed Services Committee, appointed a panel on military education with a mandate to

...review Department of Defense plans for implementing the joint professional military education requirements of the Goldwater-Nichols Act with a view toward assuring that this education provides the proper linkage between the service competent officer and the competent joint officer. The panel should also assess the ability of the current Department of Defense military education system to develop professional military strategists, joint warfighters and tacticians.¹¹

Representative Ike Skelton chaired what became known as the Skelton Panel. Between 1987 and 1989, the Skelton Panel held 28 hearings with 48 witnesses¹² and published its final report on April 21, 1989. The House Armed Services Committee held additional hearings on JPME from August 2, 1989 to September 26, 1990.¹³

The key recommendation of the Skelton Panel with regard to JPME was to “establish a two-phase Joint Specialist Officer (JSO) education process with Phase I taught in service colleges with a follow-on, temporary, Phase II taught at the Armed Forces Staff College (AFSC).”¹⁴ Congress integrated this recommendation into the FY1990-1991 NDAA¹⁵ as a statement of congressional policy. It urged the Secretary of Defense to establish a JPME framework and the legislation specifically noted that the curriculum at AFSC should emphasize multiple “hands on” exercises. These two phases of instruction were intended to be sequential but exceptions were permitted “for compelling cause.” The FY1990-1991 NDAA further stipulated that the course of instruction at AFSC had to be a minimum of three months long.

Evolution of JPME

Since its inception, the joint education and qualification system has undergone a number of statutory changes. Updated rules designate the institutions eligible to provide JPME and allow some portions of JPME to be done via “distance learning.” Other changes have strengthened the incentive system for attendance by offering accredited master’s degrees and offering more flexibility in follow-on assignments to manage individual career paths and service-specific requirements.

¹¹ U.S. Congress, House Committee on Armed Services, *Report of the Panel on Military Education of the One Hundredth Congress*, committee print, 100th Cong., 1st sess., April 21, 1989 (Washington: GPO, 1989), p. v.

¹² U.S. Congress, House Committee on Armed Services, *Report of the Panel on Military Education of the One Hundredth Congress*, committee print, 100th Cong., 1st sess., April 21, 1989 (Washington: GPO, 1989), p. 16.

¹³ House Armed Services Committee, No. 101-81, Hearings before the Panel on Military Education, 1991.

¹⁴ U.S. Congress, House Committee on Armed Services, *Report of the Panel on Military Education of the One Hundredth Congress*, committee print, 100th Cong., 1st sess., April 21, 1989 (Washington: GPO, 1989), p. 3.

¹⁵ Section 1123, P.L. 101-189, November 29, 1989. This legislation was codified as a footnote to Section 663, of Title 10 United States Code.

Roles of Military Schools (1994)

The National Defense Authorization Act for Fiscal Year 1994¹⁶ provided a congressional finding concerning the roles of military schools in providing professional military education (PME) and JPME. It stipulated that:

- (1) the primary mission of the professional military education schools of the Army, Navy, Air Force, and Marine Corps is to provide military officers with expertise in their particular warfare specialties and a broad and deep understanding of the major elements of their own service;
- (2) the primary mission of the joint professional military education schools is to provide military officers with expertise in the integrated employment of land, sea, and air forces, including matters relating to national security strategy, national military strategy, strategic planning and contingency planning, and command and control of combat operations under unified command; and
- (3) there is a continuing need to maintain professional military education schools for the Armed Forces and separate joint professional military education schools.¹⁷

Other sections of the FY1994 NDAA allowed the National Defense University to confer masters of science degrees in national security strategy and national resource strategy (Section 922), and provided more flexibility in assignment of officers following graduation from a JPME school by allowing some to serve in a joint duty assignment as their second (rather than first) assignment after graduation (Section 933).

Building a Strategic Approach to JPME and Joint Officer Management (2001 - 2005)

As DOD was nearing the 20th anniversary of Goldwater-Nichols reform, some in DOD and Congress questioned whether the joint officer management system should evolve to reflect changes in doctrine and operations.¹⁸ The National Defense Authorization Act for Fiscal Year 2002¹⁹ required DOD to initiate an independent study of Joint Officer Management (JOM) and Joint Professional Military Education (JPME) to assess the ability of the existing practice, policy and law to meet the demands of the future.²⁰

In terms of JPME, the study was required to:

1. review the sequencing of JPME and the first joint duty assignment;
2. assess the continuing utility of the requirement for use of officers in joint billets following JPME;
3. recommend initiatives to ensure JPME occurred before the first joint duty assignment;

¹⁶ P.L. 103-160 §921

¹⁷ Ibid.

¹⁸ Thie, Harry J. et al., *Framing a Strategic Approach for Joint Officer Management*, RAND Corporation, Santa Monica, CA, 2005, p. 5-6.

¹⁹ P.L. 107-107

²⁰ Section 529 of the Act also contained a requirement for the Secretary of Defense to assess a concept validation of reserve component JPME based on a program begun in 2001 by the National Defense University and for the Secretary to initiate a pilot program, if warranted.

4. recommend goals for attendance at the Joint Services Staff College (JFSC);
5. determine whether all JPME programs should remain “in-resident” or, if not, to identify any potential role for distributed learning in JPME; and
6. examine options for increasing the training capacity of JFSC.

The consultancy firm Booz Allen Hamilton conducted the independent study.²¹ While it was underway, the Government Accountability Office (GAO) published a study of the impediments to full implementation of Goldwater-Nichols and recommended that DOD develop a strategic approach to the development of officers in joint matters.²² In 2003, the completed independent study indicated that practice, policy, and law regarding joint officer management and JPME should be updated to meet the demands of a new era.²³ Following these studies, DOD asked the RAND Corporation to develop a strategic approach for reforming the joint officer management system. RAND found that while DOD had become increasingly “joint”²⁴ there was still some resistance to the development of joint officers within DOD.²⁵ RAND recommended a strategic human resource approach for identifying joint positions, linking them to joint education and experience, and better managing officer career paths to fill those positions.²⁶

Following the recommendations from these studies, as well as concerns expressed by the House Armed Services Committee that DOD lacked a “coherent, comprehensive context,” and an “overall vision for joint officer management and education,”²⁷ the Ronald W. Reagan National Defense Authorization Act for Fiscal Year 2005²⁸ required DOD to develop a strategic plan for joint officer management and JPME that would ensure that sufficient numbers of qualified officers would be available to serve in the joint environment. The Secretary of Defense was required to submit the plan to the Committees on Armed Services of the Senate and House not later than January 15, 2006. As part of the submission to Congress, DOD was required to identify and assess:

- any problems associated with the linkage of promotion eligibility to completion of JPME,
- the viability of the use of incentives for those successfully completing JPME (such as awarding military decorations),
- the feasibility and utility of a written entrance examination as part of the selection criteria for admission to a JPME school,

²¹ Booz Allen Hamilton, *Independent Study of Joint Officer Management and Joint Professional Military Education*, March 17, 2003.

²² U.S. Government Accountability Office, *Joint Officer Development Has Improved, but a Strategic Approach is Needed*, GAO-03-238, 2002.

²³ Thie, Harry J. et al., *Framing a Strategic Approach for Joint Officer Management*, RAND Corporation, Santa Monica, CA, 2005.

²⁴ In 1993, less than 20% of non-health care officers in the grades of O-5 and O-5 had completed JPME. By 2001, the percentage had grown above 20% but was still less than 30% for all services. Thie, Harry J. et al., *Framing a Strategic Approach for Joint Officer Management*, RAND Corporation, Santa Monica, CA, 2005, p. 54.

²⁵ *Ibid.* pp 77-78.

²⁶ *Ibid.* P. 92.

²⁷ U.S. Congress, House Committee on Armed Services, Subcommittee on Oversight and Investigations, *Another Crossroads? Professional Military Education Two Decades after the Goldwater-Nichols Act and the Skelton Panel*, committee print, 111th Cong., April 2010, H.Prt. 111-4, p. 21.

²⁸ P.L. 108-375

- the effects of enrolling additional private-sector civilians at NDU on the educational experience, and
- the implications of providing joint specialty qualification to reserve component officers²⁹ who have completed JPME statutory prerequisites.³⁰

The FY2005 NDAA also established a new chapter in Title 10 United States Code entitled “Professional Military Education,” to consolidate JPME. This chapter specified,

- definitions relating to JPME,
- Capstone Course requirements,
- curriculum content for Phase II, and
- student and faculty ratios for Phase II institutions.

The legislation also established a new, tiered approach to JPME with the sequencing of Phase I, Phase II and the Capstone Course, and required completion of Phase I before proceeding to Phase II after September 30, 2009.

A New Joint Qualification System (2007)

In response to the FY2005 NDAA requirements, DOD submitted its strategic plan to Congress on April 3, 2006.³¹ The plan emphasized the importance of joint experience as a pathway to joint qualification; however, it gave less attention to the connection between JPME and joint duty assignments.³² In the National Defense Authorization Act for Fiscal Year 2007, Congress significantly modified joint officer personnel policy by allowing DOD to

...establish different levels of joint qualification, as well as the criteria for qualification at each level...Each level shall, as a minimum have both joint education criteria and joint experience criteria.³³

The legislation also removed the requirement that officers complete JPME I and II prior to a joint duty assignment. In response, DOD published its implementation plan for the new Joint Qualification System (JQS) on March 30, 2007.³⁴ This plan established four levels of qualification and provided dual tracks—a standard/education path and an experience path—for earning joint qualifications (See **Table 2**). Under DOD’s new policy, joint experience points could be earned in non-JDAL assignments such as joint or interagency assignments.

The FY2007 NDAA also allowed the Secretary of Defense to waive the requirement for JPME for officers below the grade of O-7 (brigadier general or rear admiral), but only if the officer has

²⁹ DOD was required to include Reserve Component officers on the reserve active-status in the strategic plan.

³⁰ P.L. 108-375§531. The requirements listed are in relation to JPME, DOD was also required to develop a strategic plan and report on other aspects of Joint Officer Management.

³¹ Department of Defense, *DOD Strategic Plan for Joint Officer Management and Joint Professional Military Education*, April 3, 2006. Section 532 of P.L. 108-375 also required a follow-on assessment to evaluate the joint performance of senior DOD civilians, senior noncommissioned officers and the senior leadership of the reserve components.

³² U.S. Congress, House Committee on Armed Services, Subcommittee on Oversight and Investigations, *Another Crossroads? Professional Military Education Two Decades after the Goldwater-Nichols Act and the Skelton Panel*, committee print, 111th Cong., April 2010, H.Prt. 111-4, p. 21.

³³ P.L. 109-364 §§516 through 519.

³⁴ Department of Defense, *Joint Officer Management; Joint Qualification System Implementation Plan*, March 30, 2007.

completed two full tours in a joint duty assignment and the types of joint duty experiences³⁵ completed by the officer have been of sufficient breadth to prepare the officer for service as a general or flag officer in a joint duty assignment position. The legislation replaced the previous terminology of “a joint professional military education school” with “a school within the National Defense University” and clarified that NDU included only the National War College, the Industrial College of the Armed Forces and the Joint Forces Staff College.

Table 2. Joint Qualification Criteria

As established in 2007

Level	Criteria
I	<ul style="list-style-type: none"> a. Awarded upon joint certification of pre-commissioning and basic officer course completion. 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.
II	<ul style="list-style-type: none"> 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
III	<ul style="list-style-type: none"> 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 1 Oct 2008, JQO required for appointment as an O-7 (AC Only)
IV (G/FO only)	<ul style="list-style-type: none"> 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

Source: Department of Defense, *Joint Officer Management; Joint Qualification System Implementation Plan*, March 30, 2007, p. A-2.

Notes: OSD (Office of the Secretary of Defense, JS (Joint Staff), COCOM HQs (Combatant Command Headquarters), JTF HQs (Joint Task Force Headquarters). Current joint qualification criteria can be found in DOD Instruction 1300.19, *DOD Joint Officer Management Program*, March 4, 2014, Enclosure 3, Table I. AJPME is Advance Joint Professional Military Education, a 40-week program providing JPME specifically to reserve officers through a mix of distance and face-to-face learning.

Professional Military Education Two Decades after the Goldwater-Nichols Act (2010)

In April 2010, the House Armed Services Committee, Subcommittee on Oversight and Investigations released a Committee Print reporting the findings of a review of Professional Military Education (PME) to include JPME. Key committee findings in relation to JPME were as follows³⁶:

³⁵ The law did not specify that the evaluation of joint duty experience was limited to joint duty assignments.

³⁶ U.S. Congress, House Committee on Armed Services, Subcommittee on Oversight and Investigations, *Another Crossroads? Professional Military Education Two Decades after the Goldwater-Nichols Act and the Skelton Panel*, (continued...)

- Due to the removal of the statutory requirement for JPME prior to serving in a joint duty assignment it was not clear whether JDAL positions were being filled with appropriately qualified officers.
- Amid increasing joint and service-specific staff duty requirements, a significant number of officers serving in JDAL positions were too junior to have completed JPME I prior to their joint assignment.
- Approximately one-third of officers who had completed JPME II prior to a joint assignment considered the course to have low preparatory value and, on average, the 10- or 12-week JPME II courses were given practically the same rating as the 10-month course in terms of usefulness.
- JPME I provides insufficient preparation for the competencies needed to serve in joint duty assignments.
- Completion of and demand for JPME appear to be more closely tied to promotion potential than to developing required competencies to serve in joint duty assignments.
- Competing demands over the course of an officer's career for training, education, and operational experience, make it difficult to manage joint education and assignment.
- The JPME model for developing joint officers focuses on building generalists and does not adequately address a requirement for specific joint competencies.
- There is a greater need for joint subject matter to be taught at the primary level.

The National Defense Authorization Act for Fiscal Year 2011³⁷ did not include any reference to JPME; however, it included a provision with respect to joint officer management that expanded how joint assignments and experience could be determined. Section 521 revised the definition of joint matters to specify that “integrated military forces” includes more than one military department, or one military department and one or more of the following: other departments and agencies of the United States, military forces or agencies of other countries, non-governmental persons or agencies.

Changes to JPME in Recent Congresses

In the past five years Congress has made minor changes to JPME. Section 552 of the National Defense Authorization Act for Fiscal Year 2012³⁸ authorized DOD to carry out a five-year pilot program for JPME II instruction on a nonresident basis at not more than two combatant commands.³⁹ In response, DOD established a JPME course at the Joint Special Operations University (JSOU) at MacDill Air Force Base, Florida, which is home to both the U.S. Special Operations Command (USSOCOM) and the U.S. Central Command (USCENTCOM). JSOU was established as a satellite program of the JFSC. Section 552 of the FY2012 NDAA also authorized

(...continued)

committee print, 111th Cong., April 2010, H.Prt. 111-4, p. 32-33.

³⁷ P.L. 111-383.

³⁸ P.L. 111-383.

³⁹ P.L. 112-81.

credit for completion of JPME I at the National Defense Intelligence College (now known as the National Intelligence University).

The National Defense Authorization Act for Fiscal Year 2015⁴⁰ amended 10 U.S.C. §2154 to authorize senior level service courses of at least ten months to meet the requirements of JPME II if designated and certified by the Secretary of Defense. Previous law required JPME to be taught in residence at the Joint Forces Staff College or senior level service schools.⁴¹ This legislation appears to provide more flexibility to DOD in how JPME II coursework is completed.

Acquisition as a “Joint Matter”

Over the past few years, Congress has been concerned with how to improve the recruitment, retention, and career management for the acquisition workforce. By statute, Joint Specialty Officers are those that are “particularly trained in or oriented toward, joint matters.”⁴² “Joint matters”, by statute are currently defined as:

...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.⁴³

Provisions in the Senate-passed FY2016 NDAA (S. 1356) added acquisition matters to this list of “joint matters” thus extending joint duty credit for military personnel who serve in acquisition-related assignments. The Act also includes provisions that would allow officers to pursue a dual career track with a primary specialty in combat arms with a functional sub-specialty in an acquisition field. In addition the conferees encouraged the Secretary to ensure that the curriculum for Phase II joint professional military education includes matters in acquisition to ensure the successful performance in the acquisition or acquisition-related fields.⁴⁴

Other Issues for Congressional Consideration

While there have been few substantial changes to JPME in recent years, some within DOD and Congress have raised concerns about the state of joint education. Secretary of Defense Ashton Carter announced in December 2015 that the Department of Defense (DOD) would be launching a review of the department’s structure and efficiency in the context of the GNA reforms. A DOD memorandum dated January 4, 2016 outlined the key questions that would be addressed in this review. With respect to the joint officer management system, DOD plans to consider,

1. Do current law and policy governing joint duty qualifications provide the right human capital development to meet our joint warfighting requirements?

⁴⁰ P.L. 113-291.

⁴¹ These two avenues for completing JPME II remain viable.

⁴² 10 U.S.C. §661.

⁴³ 10 U.S.C. §668.

⁴⁴ H.Rept. 114-270.

2. Are there adjustments that can be made to balance the often competing demands of joint professional development and other specialized expertise or other career development considerations?

A spokesman for DOD indicated that this review might result in internal policy changes and/or legislative proposals. Other questions that have been raised by those in the Defense community include:

- Questions about faculty and staff at institutions certified to provide JPME.
 - Are faculty knowledgeable and do they have the appropriate qualifications?⁴⁵
 - Is there an appropriate mix of civilian and military faculty?⁴⁶
 - Is faculty compensation appropriate?⁴⁷
 - Are the students-to-faculty and administrator-to-faculty ratios appropriate?⁴⁸
- Questions about the adequacy of JPME curricula in providing necessary knowledge and skills.
 - Does the curriculum adequately deliver desired leader attributes?⁴⁹
 - Should the curriculum be expanded?⁵⁰
 - Does the curriculum provide the right mix of tactical v. technical skills needed to serve in joint billets?⁵¹
- Questions about how JPME is delivered.
 - What is the appropriate mix of students? (e.g., military-civilian, branch of service, officer-enlisted, foreign military/civilians)⁵²
 - Can JPME be adequately provided in a non-resident setting?⁵³
 - Is there adequate coordination between JPME-granting institutions?⁵⁴
 - Could JPME credit be earned at additional degree-granting institutions? (e.g. additional service schools or civilian institutions)
- Questions about the role of JPME in terms of career management and officer development.

⁴⁵ Johnson-Freese, Joan, "War-College Woes", accessible at: <http://chronicle.com/blogs/conversation/2014/07/24/war-college-woes/>.

⁴⁶ Scales, Robert H., "Too Busy to Learn," *Proceedings* 136, no. 2, February 2010.

⁴⁷ Reed, George R., "The Pen and the Sword, Faculty Management Challenges in the Mixed Culture Environment of a War College." *Joint Forces Quarterly*, no. 72, 1st Quarter, 2014.

⁴⁸ Ibid.

⁴⁹ U.S. Government Accountability Office, *Joint Military Education; Actions Needed to Implement DOD Recommendations for Enhancing Leadership Development*, GAO-14-29, October 2013, p. 14.

⁵⁰ See for example, Gvosdev, Nikolas K., "Should Military Officers Study Policy Analysis", or Stigler, Andrew L., "Assessing Causality in a Complex Security Environment", in *Joint Forces Quarterly*, no. 76, 1st Quarter, 2015.

⁵¹ Statement of James R. Locher before the Senate Armed Services Committee on 30 Years of Goldwater Nichols Reform, November 10, 2015.

⁵² See for example, Hilger, LT Ryan, "Better Education Makes Better Officers," *Proceedings*, February 2013, p. 54.

⁵³ Ibid.

⁵⁴ U.S. Government Accountability Office, *Joint Professional Military Education: Opportunities Exist for Greater Oversight and Coordination of Associated Research Institutes*, GAO-14-216, March 2014.

- What should the appropriate balance be between service-centric PME and JPME?⁵⁵
- Should completion of JPME continue to be tied to officer promotion?⁵⁶
- What should the JPME requirements be for Reserve Component (RC) members?⁵⁷
- What should the balance be between joint experience and joint education in terms of joint officer qualification?
- Do existing assignment policies allow for return-on-investment for JPME?⁵⁸

Congress may consider these and other questions with regard to JPME and the joint officer management system as part of the GNA review and in future legislative initiatives.

⁵⁵ Keister, Rhonda et al., "Joint PME: Closing the Gap for Junior Officers," *Joint Forces Quarterly*, July 1, 2014.

⁵⁶ Some critics contend that the Services place a greater emphasis on JPME in terms of qualifying officers for promotion and not as method to prepare officers for joint duty assignments. See for example, Bowhens, Vincent C., "Manage or Educate; Fulfilling the Purpose of Joint Professional Military Education," *Joint Forces Quarterly*, no. 67 (4th Quarter 2013).

⁵⁷ For background and discussion, see, Thie, Harry J. et al., *Framing a Strategic Approach for Reserve Components Joint Officer Management*, RAND Corporation, Santa Monica, CA, 2006.

⁵⁸ U.S. Congress, House Committee on Armed Services, Subcommittee on Oversight and Investigations, *Investing in our Military Leaders: the Role of Professional Military Education in Officer Development*, 111th Cong., 1st sess., July 28, 2009, H.Hrg 111-89 (Washington: GPO, 2010).

Appendix. Additional JPME Information

Table A-1. Five Levels of JPME

Levels	Who Attends?	Course Focus
Pre-commissioning	Officer candidates enrolled in Officer Candidate School, Officer Training School, Reserve Officer Training Corps, and Military Service Academies.	Basic: <ul style="list-style-type: none"> • U.S. defense structure, • roles and missions of other military services, • combatant command structure, and • the nature of American military power and joint warfare.
Primary	Junior officers at the O-1 through O-3 ranks.	Tactical: <ul style="list-style-type: none"> • Joint Task Force combatant command structure, and • national and joint systems support for tactical-level operations.
JPME Phase I*	Intermediate level officers at the O-4 rank and senior level officers at the O-5 and O-6 ranks.	Tactical and Operational: <ul style="list-style-type: none"> • National military strategy, • joint planning, • joint doctrine, • joint command and control, and • development of joint force and joint requirements.
JPME Phase II*	Senior level officers at the O-5 and O-6 ranks.	Operational and Strategic: <ul style="list-style-type: none"> • National security strategy, • theater strategy and campaigns, • joint planning processes and systems, • integration of joint, interagency, intergovernmental, and multinational capabilities, and • expansion of JPME I topics.
Capstone*	General/Flag Officers (O-7 and above)	Operational and Strategic: <ul style="list-style-type: none"> • High-level integration of joint, interagency, intergovernmental, and multinational responsibilities, • integrating elements of national power across military operations to accomplish security strategies, and • supporting strategic goals and objectives through joint, interagency, intergovernmental, and multinational operations.

Source: Table derived from GAO-14-29, p. 7. Figure I.

Notes: "*" Denotes a statutorily-directed JPME course level.

Figure A-1. Map of in-Residence Service and Joint Colleges and Universities Certified to Provide Joint Professional Military Education

As of 2014



Source: Graphic from GAO-14-216 as reported to GAO by DOD.

Notes: Marine Corps University comprises two JPME-granting colleges—U.S. Marine Corps War College and U.S. Marine Corps Command and Staff College. Similarly, Air University comprises the Air War College and Air Command and Staff College. This map does not include the Joint Special Operations University (JSOU) at MacDill Air Force Base, Florida which is considered a satellite program of the Joint Forces Staff College.

Appendix A. Acronyms

Table A-2. Acronyms and Definitions

Acronym	Definition
AFSC	Armed Forces Staff College
CJSC	Chairman of the Joint Chiefs of Staff
DOD	Department of Defense
G/FO	General and/or Flag Officer
GNA	Goldwater-Nichols Act
ICAF	Industrial College of the Armed Forces
JDAL	Joint Duty Assignment List
JFSC	Joint Forces Staff College
JPME	Joint Professional Military Education
JQO	Joint Qualified Officer
JSO	Joint Specialty Officer
JSOU	Joint Special Operations University
NDU	National Defense University
PME	Professional Military Education
RC	Reserve Component
SECDEF	Secretary of Defense

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