

Soldiers preparing to depart Aviano Air Base, Italy, to become Combined Joint Task Force 76 in Afghanistan, Operation Enduring Freedom



31<sup>st</sup> Communications Squadron (Bethann Caporaletti)

*The joint force, because of its flexibility and responsiveness, will remain the key to operational success in the future. The integration of core competencies provided by the individual services is essential to the joint team. . . . To build the most effective force for 2020, we must be fully joint: intellectually, operationally, organizationally, doctrinally, and technically.*

— Joint Vision 2020, 2000

# Expert Knowledge in a Joint Task Force Headquarters

By JOSEPH C. GERACI

Officers receive service-specific education and undergo experiences within their components that provide the expert knowledge that enables them to operate in their respective military departments. Given the Department of Defense (DOD) emphasis on service interoperability, what addi-

tional expert knowledge, if any, is necessary for an officer to operate effectively in a joint task force (JTF) headquarters? This article contends that officers in the grades of O-3 and O-4 (captains and majors, or lieutenants and lieutenant commanders in sea services) do *not* require additional formal expert knowledge because they receive an adequate amount during their service component education. Instead, it argues that informal expert knowledge in the form of true integration is essential to operate in a JTF headquarters.

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Marine CH-46E from USS *Iwo Jima* in Sierra Leone to evacuate personnel, August 2003



U.S. Air Force (Justin D. Pyle)

Officers in the grades of O-3 and O-4 generally receive little accredited formal joint education and have limited joint experience prior to operating in a JTF headquarters. Those in the grade of O-3 typically do not receive additional joint education outside of their service-specific primary schooling and usually do not have the experience of operating in a JTF headquarters or serving in a joint position identified in the approximately 9,000 billets on the joint duty assignment list. Even though many O-4s receive their first phase of accredited joint professional military education (JPME), most do not have previous JTF headquarters experience.

This article uses JTF *Liberia* as a case study to examine the issue of additional expert knowledge. This task force is especially interesting because its joint manning roster consisted of 101 officers, with 32 percent being O-3s and 31 percent O-4s. These percentages were the highest of any grades serving in the JTF headquarters. Therefore, these

grades made up the majority of officers, and they successfully performed their duties, with most utilizing only the knowledge and experience developed through their respective service component duties and education systems.

JTF *Liberia* was activated on July 25, 2003, and was operational until October 9, 2003. Its mission was to mitigate a humanitarian crisis in Liberia resulting from civil strife. The headquarters for U.S. Army Southern European Task Force, stationed in Vicenza, Italy, served as the core for the headquarters and received augmentation from all of the service components. At the height of operations, 5,000 members from the headquarters in Italy were spread throughout 9 West African countries or were afloat on USS *Iwo Jima* in the joint operations area off the coast of Liberia. The task force played a crucial role in coordinating the efforts of a 3,500-member force from 8 member states of the Economic Community of West African States (ECOWAS). To accomplish its mission,

the JTF headquarters also interacted closely with the United Nations, humanitarian organizations, the State Department, and an array of U.S. Embassies. In recognition of the accomplishments of the headquarters during JTF *Liberia*, the Chairman of the Joint Chiefs of Staff presented it the Joint Meritorious Unit Award.

### Expert Knowledge of the Professional Officer

Armies and navies have existed for thousands of years but did not organize into the professional institutions recognizable today until the mid- to late 1800s. After the experiences of the U.S. Civil War, military leaders recognized the need to establish the officer corps as a profession in order to provide a dependable Army. William Tecumseh Sherman,

Commanding General of the Army from 1869 to 1883, sparked a professional reform movement by emphasizing education and training as a method of creating an officer corps that was “a truly professional body.”

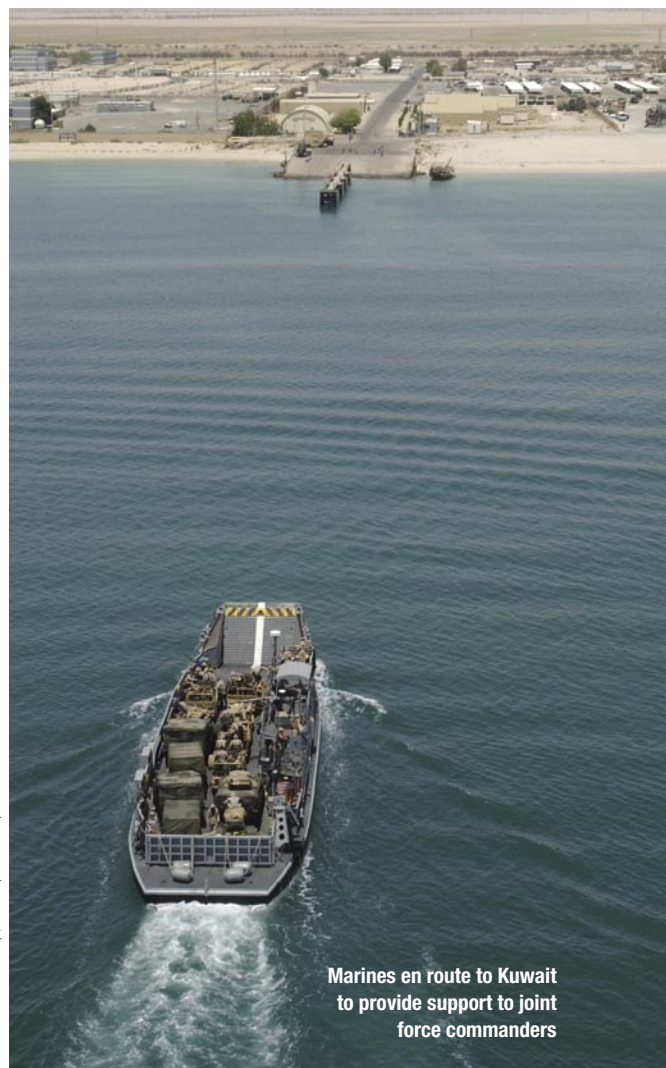
Social scientists began identifying the military officer corps as a profession in the mid-20<sup>th</sup> century. Pioneer studies by Samuel Huntington (*The Soldier and the State*, 1957) and Morris Janowitz (*The Professional Soldier*, 1960) both defined the officer corps as a profession whose members possessed expert knowledge. Huntington provided the basis for the theoretical model by which this article will analyze the JTF *Liberia* case study as it pertains to the acquisition and use of expert knowledge.

Huntington states, “The modern officer corps is a professional body and the modern military officer a professional man.” They are professionals because they possess the distinguishing characteristics of professionals—expertise (or expert knowledge), responsibility (to protect a defenseless society), and corporateness (self-policing with a regulative code of ethics). An officer’s expertise is in the field of “management of violence” and provides him a competence that is common to all officers—land, sea, and air. The expert knowledge is acquired through prolonged education and experience.

This article builds on Huntington’s model by further defining expertise as consisting of both formal and informal expert knowledge. Formal expert knowledge, acquired through educational institutions, provides officers a minimum founda-

tion to enter into their respective military fields. It consists of instruction in the form of doctrine, strategy, and tactics. Officers receive formal expert knowledge through two phases, according to Huntington: “a broad, liberal cultural background and specialized skills of knowledge of the profession.”

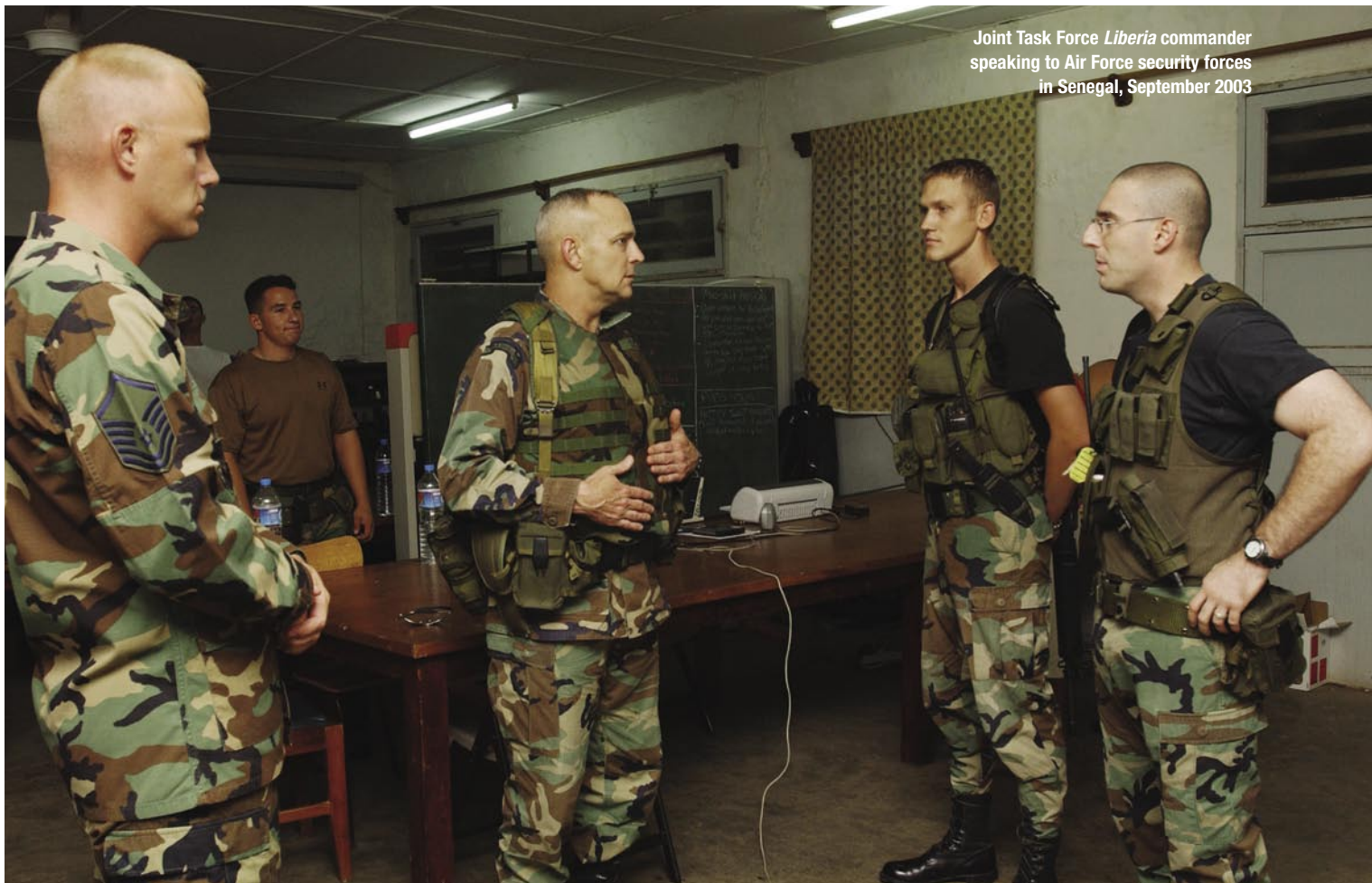
Informal expert knowledge is more experiential and builds on the foundation of formal expert knowledge. It assimilates officers into specific organizations and enables them to operate effectively in their assigned positions. It is acquired through an indoctrination and integration process that consists of an orientation to the specific operating systems, procedures, and idiosyncrasies of the duty position and organization. Both forms of knowledge are imperative for an officer to operate in a specific environment. The formal type provides the foundation, and the informal type enables officers to apply this knowledge as they execute their specific duties.



Marines en route to Kuwait to provide support to joint force commanders

Combat Camera Group, Pacific (Bart Bauer)

**after the U.S. Civil War, leaders recognized the need to establish the officer corps as a profession to provide a dependable Army**



Joint Task Force *Liberia* commander speaking to Air Force security forces in Senegal, September 2003

52<sup>nd</sup> Communications Squadron (Karen Z. Slocott)

### Development of the Professional Officer

The Chairman of the Joint Chiefs of Staff (CJCS) has continued the legacy of cultivating officer professionalism initiated by General Sherman by developing the educational requirements for membership in the officer corps. Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 1800.01A, “The Officer Professional Military

Education,” structures the development of the professional officer and provides common educational standards and joint learning objectives for all professional military

education (PME) institutions. The instruction identifies areas of emphasis at five military education levels: precommissioning, primary, intermediate, senior, and general/flag officer. By providing the educational standards and joint learning objectives for each level, CJCS has identified the formal expert knowledge necessary for officers to begin in their respective fields. This formal expert

knowledge is sufficient for junior officers to enter a JTF headquarters.

CJCSI 1800.01A provides educational standards at each officer developmental stage. Only the first three phases will be discussed here since they deal directly with the targeted O-3 and O-4 grades. For the precommissioning education level (service academies, Reserve Officer Training Corps, and officer training and candidate schools), PME requires that institutions—as Huntington suggests—provide a broad, liberal arts education for military professionals while also orienting officer candidates/cadets to an education in basic U.S. defense structure, roles and missions of other military services, the combatant command structure, and the nature of American military power and joint warfare.

During the next education level for officers, the primary level (for O-3s), PME institutions are required to impart specialized skills of technical knowledge to provide newly commissioned and junior officers with the formal expert knowledge for service in their respective branch, warfare,

**with effective integration into a JTF headquarters, officers can operate in a joint position with limited joint experience**

or staff specialties. As part of the primary education level, service component PME institutions provide education covering the following joint learning objectives:

- fundamentals of joint warfare, JTF organizations, and the combatant command structure
- characteristics of a joint campaign
- national and joint systems support of tactical-level operations
- capabilities of the systems of other services.

The third level is the intermediate educational level (primarily for O-4s), consisting of the service intermediate-level PME institutions, Joint and Combined Staff Officer School, and service-recognized equivalent fellowship and international military colleges. The institutions at this level focus on warfighting within the context of operational art and expand student understanding of joint force employment. During training at this level, officers in the grade of O-4 receive their first accredited joint educational instruction in the form of JPME phase I. The joint learning objectives are national military capabilities and command structure; joint doctrine; joint and multinational forces at the operational level of war; joint planning and execution processes; and information operations and command, control, communications, and computers.

By providing education to meet the standards and joint training objectives outlined in CJCSI 1800.01A, PME institutions provide officers with sufficient formal expert knowledge to enter a JTF headquarters. This education provides O-3s and O-4s with a joint foundation. With the addition of informal expert knowledge in the form of an effective integration into a JTF headquarters, these officers can operate in a joint position even with limited joint experience.

### Effective Integration

Effective integration enables officers in the grades of O-3 and O-4 to operate competently in the joint arena as part of a JTF headquarters. It is also critical to the joint reception, staging, and onward movement of units that can meet the combatant commander's operational requirements. Moreover, a deliberate integration process provides officers with the informal expert knowledge to assimilate augmentees into the staff quickly.

During JTF *Liberia*, most O-3s and O-4s performed their duties using only the knowledge and experience developed through their respective service component duties and education. No officer in the grade of O-3 came to the headquarters

with any accredited joint education instruction, and only 3 percent of those had previous JTF headquarters experience. No O-4 who served in the JTF *Liberia* headquarters completed any joint education instruction beyond JPME phase I, and only 16 percent of those officers had previous JTF headquarters experience.

After these officers were integrated into the headquarters, they were able to perform effectively while filling essential positions on the joint manning roster. Key examples were J-1, Chief of Strength Management Division (filled by an O-3); J-2, Assistant Joint Intelligence Support Element Chief (filled by an O-3); and J-3, Joint Operations Center officer-in-charge (filled by an O-4). The officers who filled O-3 and O-4 positions performed duties that proved absolutely vital to JTF *Liberia*. That was possible because they came to the headquarters with sufficient formal joint expert knowledge and were then integrated.

So what is effective integration and how is it accomplished? The integration process should contain an orientation in at least four elements:

- the current operating situation
- JTF headquarters joint standard operating procedures (JSOP)
- command, control, communications, computers, intelligence, surveillance, and reconnaissance (C<sup>4</sup>ISR) systems—battlespace management
- capabilities of each service component involved in the operation.

During the orientation to the current operating situation, a designated agent from each staff element should provide an overview from the element's perspective. This orientation should cover current and previous disposition of friendly and enemy forces and significant activities and present the published orders from both the JTF headquarters and the higher headquarters. It should also cover the command relationships with higher and subordinate units. This orientation would bring new officers up to date on the current situation and help them understand the commander's intent, critical information requirements, and the concept of operations. The end-state for the orientation should be that new officers have the same operating picture as the JTF commander and the subordinate components. The integration process should next focus on the JSOP for the JTF headquarters.

The JSOP provides guidelines and standard procedures to help new officers perform their duties in the joint headquarters. It enables them to understand how their position relates to other

personnel and the specific day-to-day duties expected of them. Such activities may include the time and format for the battle update briefings; boards, centers, cells, and working group meetings; shift procedures; maintenance of situation awareness through periodic staff huddles; and staff drills for actions ranging from mission planning and orders production to joint operations center actions during battle drills. Knowledge of the JSOP is important because it also shows how the JTF staff plans, disseminates information, and communicates with subordinate units and higher headquarters.

With the advanced technology used in the JTF headquarters, an orientation to the battlespace management systems is an important part of integration. New augmentees must know how to apply the capabilities of the systems in order to plan, execute, and communicate with subordinate units, different staff elements in the headquarters, and higher headquarters. JTF *Liberia* possessed a suite of compatible information management tools that enabled it to maintain situational awareness, conduct parallel planning, and widely disseminate information.

**with the advanced technology in the JTF headquarters, an orientation to the C<sup>4</sup>ISR systems is an important part of integration**

The C<sup>4</sup>ISR systems facilitated all elements of the task force to share a near-real-time and commonly shared understanding of operations. While contractors and technical support were available to establish and troubleshoot the battlespace management systems used by JTF *Liberia*, training was required during integration to enable augmentees to operate and gain maximum benefit from the systems. The following overview of the C<sup>4</sup>ISR systems used by the task force highlights the importance of JTF headquarters having an orientation to battlespace management systems as part of the integration process.

■ *JTF Liberia Web page.* The JTF Web page provided a globally accessible and secure means for users to gain and maintain situational awareness. It also enabled the joint task force to distribute information widely. Members of the Army and joint staffs frequently accessed the Web page for timely information. Each JTF headquarters staff section was responsible for updating its own link. The headquarters conducted update briefings to the JTF commander using the Web page platform in conjunction with secure video teleconferencing, which enabled a widely distrib-

uted audience to maintain a shared and current understanding of the situation and the evolving commander's guidance.

■ *Defense collaborative tool suite (DCTS).* For collaborative parallel planning, JTF *Liberia* used the DCTS routinely. For example, during the daily commander's conference call, the headquarters utilized it to tie in Special Operations components in Europe, Air Force components in Africa, a JTF liaison officer team to ECOWAS, the JTF Main in Europe, and the JTF Forward. One Marine commander used it to conduct a backbrief for his plan for noncombatant evacuation contingency operations to the JTF *Liberia* commander and supporting components. The real-time capability of DCTS provided a common understanding of the mission and the commander's guidance instantaneously.

■ *Global broadcasting system.* This system enabled the JTF headquarters to transfer high-bandwidth files, link the JTF with national and theater systems, and access real-time feeds—for example, from unmanned aerial vehicles. It also provided access to U.S. and international news media.

■ *Global Command and Control System—Army (GCCS-A).* The command and control personal computer (C<sup>2</sup>PC), a system of GCCS-A, is what JTF *Liberia* primarily used to display deployed forces in near-real time. C<sup>2</sup>PC displayed forces in a standard format on any type of map data available from the National Geospatial-Intelligence Agency from 1:5 million scale down to 1-meter imagery. This system gave headquarters a common operating picture 24 hours a day, 7 days a week.

The next recommended element of the integration process is an orientation to the service components. Even though officers receive a basic orientation through PME institutions, they need a more detailed familiarization with the specific services involved in the JTF headquarters. A representative from each service should provide an orientation ranging from ranks and service-specific vernacular, to the details of the systems and units the service has dedicated to the headquarters. This explanation echoes Joint Publication 1 in that "all members of the Armed Forces must understand their fellow services to the extent required for effective operations." An orientation to the vernacular is important because the services daily use the same words with different meanings. For example, the Navy uses *casualty* for a maintenance shortfall on a vessel, while the Army uses it to describe a Soldier injured, killed,

Airman directs members of Fleet Anti-Terrorism Security Marines from C-130 in Monrovia, Liberia, August 2003



786th Communications Squadron (Justin D. Pyle)

or missing under hostile fire. Also, new officers in the headquarters must know the capabilities of the assets committed by each service component.

The joint task force successfully used an integration process that resembled this proposed model. As an example of its effectiveness, during the JTF *Liberia* experience, a joint planning group consisting of an O-3 from each service component developed a detailed plan to deploy the JTF

**new officers in the headquarters must know the capabilities of the assets committed by each service component**

*Liberia* Forward personnel and equipment from Italy to USS *Iwo Jima* before it entered the joint

operations area. This was one of the first times a JTF headquarters was established aboard a Navy vessel that was committed to another operation (*Iraqi Freedom* in the Persian Gulf). The deployment entailed the JTF Forward leaving Italy on Air Force C-130s, Air Force personnel in Africa transloading the JTF Forward from the aircraft via contracted material handling equipment, and then Marine Corps CH-46s and CH-53s transporting the personnel and equipment to the vessel just before it steamed into the region. Without providing junior officers with the informal expert knowledge in the form of an effective integration, this complex and detailed plan could not have

been executed as effectively.

Professional military education institutions provide officers with formal expert knowledge. Adding informal expert knowledge in the form of an effective integration brings to fruition Samuel Huntington's statement that an officer's expertise provides him with a competence that is common to all officers—land, sea, and air. Professional military educational institutions provide officers in the grades of O-3 and O-4 with sufficient formal expert knowledge to enter the JTF headquarters. Of critical importance is the ability of a headquarters to receive the officers and provide them the informal expert knowledge to be integrated into the staff. The proposed model contained herein suggested covering four elements for the integration to succeed: orientation to the current operating situation, the JSOP, battlespace management systems, and service-component capabilities. As demonstrated by JTF *Liberia*, it is absolutely necessary to assimilate these officers fully by providing informal expert knowledge in the form of an effective headquarters integration process. **JFQ**

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