PROFESSIONAL DEVELOPMENT
OF
OFFICERS STUDY

LEADER

FRAME OF REFERENCE

KNOWLEDGE

VISION

CARING

COMMITMENT

ACTION

CHARACTER

AUDACITY

SKILLS

WARRIOR
SPIRIT

MENTOR

VOLUME IV — DEVELOPMENT PERIODS

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20. ABSTRACT (Continue on reverse side if necessary and identify by block number)

The purpose of the study was to re-examine all aspects of the officer professional develoment system as it has evolved since the 1978 Review of Education and Training for Officers (RETO) Study. This report provides an analysis of every area of officer professional development (Active and Reserve), with particular concentration on education and training out to the year 2025. The recommendations made are designed to transition the Army to a training and education strategy which will more effectively meet tomorrow's challenges.

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The views, opinions, and/or findings contained in this report are those of the study group author(s) and should not be construed as an official Department of the Army position, policy or decision, unless so designated by other official documentation.

The words "he," "him," and "men," when used in this report represent both masculine and feminine genders unless specified otherwise.

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Professional Development of Officers Study Group Report
Table of Contents
Volume IV—Development Periods and Reserve Components

Volume 1—Main Report

Volumes II-VI

Volume IV — Development Periods and Reserve Components

Volume V — Policy Impact Analysis

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Annex AA

Development Period: Pre-Commissioning

1. PURPOSE. To establish standards for pre-commissioning programs to ensure that successful graduates meet a common, expanded set of commissioning standards.

2. DISCUSSION.

a. Background.

(1) The pre-commissioning development period begins with entry into a pre-commissioning program and ends upon commissioning as an officer.

(2) During this period, the cadet or candidate begins the transition from a purely civilian orientation toward a commitment to the Professional Army Ethic. Professional attributes such as courage, candor, commitment, and the pursuit of fitness as a way of life are reinforced and developed as appropriate. The cadet/candidate experiences a progression of leadership experiences, mostly within the context of a peer environment, and through summer camps and other skill training experiences acquires basic military skills, knowledge, and abilities. It is also during this period that the cadet or candidate makes the decision to assume the responsiblility for the defense of the nation and accept a commission as an officer.

(3) There are three primary sources for commissioning: the United States Military Academy (USMA), Officer candidate school (OCS), and Reserve Officer Training Corps (ROTC). The Army National Guard operates its own state OCS programs in coordination with the Infantry School. Because there is a wide variance in standards and experiences across and within various commissioning programs, it is essential that each cadet and candidate become proficient in skills and abilities derived from a common core program so that upon commissioning new officers will share a similar frame of reference.

b. Type Duties. Cadets and officer candidates serve in a variety of peer leadership positions and become somewhat familiar with the duties of junior officers through classroom instruction and discussion, some field training, summer camp and other practical experiences. Upon certification that the cadet or candidate has successfully achieved pre-commissioning standards, he is offered a commission. Development experiences range from collegiate to authoritarian in nature and are varied across the pre-commissioning programs.

c. Frame of Reference. Because of the differing sources of commissioning, each with a unique set of development experiences, special challenges exist in providing the cadet and candidate with a common shared frame of reference. Development of this frame of reference is summarized in the following brief discussion of the officer attributes at the end of the Pre-Commissioning Development Period.

(1) BE. As a leader, each cadet and candidate becomes committed to the Professional Army Ethic. He accepts the basic officer values of integrity. selflessness, honesty, special trust, loyalty and care for soldiers. He also accepts responsiblility for protecting the Nation, and is physically fit and able to perform under stressful conditions.

(2) KNOW. As a leader, each cadet and candidate must know:

(a) The factors of leadership, to include the relationship of officer behavior to professional values, basic military leadership, communication skills, human needs and emotions, so as to be able to effectively lead small units in combat.

(b) Himself, to include the necessity for possessing basic educational skills, individual responsibility for self-development, and familiarity with the results provided from an assessment program.

(c) Duty requirements, to include Military Qualification Standards (MQS-1) tasks, practical approaches to military problem solving, the ap-

plication of military history to present problems, initiation of a professional reading program, basic knowledge of "the threat," map reading and cross-country navigation, the fundamentals of small unit infantry tactics, and knowledge of maintenance, use, and inspection of individual weapons and equipment.

(3) DO. As a leader, each cadet and candidate must be able to provide direction for others through the application of elementary decision-making techniques and the use of a common operational language to direct actions and conduct planning for small unit operations. Above all, the cadet and candidate must begin a commitment not only to mission accomplishment but also begin to experience responsibility for the development of self and subordinates.

d. Schooling and Related Development Period Experiences. To prepare for commissioning, cadets and candidates attend a variety of programs at various institutions. For example, ROTC cadets are educated in a college environment and participate in ROTC classes, military training for a few hours each week and summer camp (excpetions exist in those colleges whose entire graduating class receives commissions, e.g., the Citadel and Virginia Military Institute). USMA cadets experience four intense years with military instructors and training integrated with college courses to achieve an inculcation of professional values that make officership a way of life. OCS provides officer candidates an intense period of direct military training in a strict military training environment. Pre-commissioning training—through summer camp, drill, troop leader training, classes, and various other formal and informal experiences—prepares cadets and candidates to become officers.

e. Roles and Methods in the Development of Cadets and Officer Candidates.

(1) Development Roles. Cadets and officer candidates are responsible for proactively seeking to acquire the knowledge, skills and abilities required of them prior to commissioning. Instructors and cadre will function in a mentor role, serving as not only instructors and educators but also as teacher, coach, guide and role model. These mentors will assist cadets and candidates through a series of systematic and progressive development challenges that stress hands-on experience, small group methodologies, and discipline. As role models, the mentors will also guide cadets and candidates in understanding and internalizing basic military values and the Army Ethic. Outside of the classroom, the cadet and candidate military organizations will

serve as learning laboratories to provide professional development opportunities that are sequential and progressive in nature and gradually expose the cadet and candidate to the full range of responsibilities associated with officership.

(2) Methods to Emphasize. Generally, small group learning under the tutelage of an experienced instructor provides the best opportunity for detailed understanding of the material being taught. This implies that cadets and candidates are expected to receive as broad-based an education as possible so as to acquire those cognitive skills necessary for progressive development of decision making skills through a military career. In conjunction with the broad-based education, military skills training (to include leadership and inculcation of appropriate values) should be as experiential as possible. This means application of the theories developed in Chapter IV of Volume I to the classroom, field training and cadet/candidate organization learning environments. Computer assisted learning experiences complement rather than replace other learning experiences. Practical field experiences such as airborne, air assault and troop leader training provide valuable "hands on" opportunities for developn ...

f. Cadre Development. For most cadets and candidates, their pre-commissioning cadre represent their ¹ contact with military officers. As such, th. sets the tone for their initial development, ¿ itudes and goals. It is imperative that this cadre have a firm foundation in leadership and mentoring techniques prior to assuming these very important duties.

g. Aim and Major Thrusts.

(1) Aim. The aim of this development period is to provide properly qualified individuals to meet Army commissioning standards.

(2) Major Thrusts. The following major thrusts assist in accomplishing this aim:

(a) Tighten commissioning standards to meet current and projected Army requirements.

(b) Review current pre-commissioning entry standards for all programs and ensure they meet a common minimum standard and are tied to standards for commissioning.

(c) Develop a set of branch-specific commissioning standards for each branch which are compatible with basic commissioning standards.

(d) All standards will be tied to the individual assessment program (see Annex H, Self Development and Individual Assessment Program).

(e) Verify MQS I skill qualification.

(f) All ROTC cadre will attend a formal training program.

3. RECOMMENDATIONS.

a. The base policies for this period are:

(1) Commissioning standards will be tightened and tied to an assessment program.

(2) Minimum standards for entry into all precommissioning programs will be uniform, based on commissioning standards and tied to the individual assessment program.

(3) Branching selection procedures will consider the qualifications of each individual measured against an established set of standards required by each branch.

(4) Assignment of cadre to institutions will be based, in part, on the branch production mission of the institution (reinforce through branch-specific position coding).

(5) All ROTC cadre will attend a formal training course prior to assuming duties.

b. A magnitude of issues are associated with pre-commissioning, namely; sources, methodology of instruction, standards, improvement of reading/writing and analytical skills, branching and accessioning, and training of ROTC cadre. Therefore, recommend that the DA ROTC Study Group, chartered in June 1984 to develop ways to improve physical fitness, professionalism, educational preparation and quality through the establishment of entry/commissioning standards, conduct further study on this development period.

4. CSA REMARKS. Conceptually approved.

Appendices

1 Pre-commissioning and Commissioning Standards
2 Glossary
3 Action Plan
4 Phasing Plan

Author: LTC Elam
Team Chief: COL Johnson

Appendix 1 to Annex AA

Pre-Commissioning and Commissioning Standards

1. PURPOSE. To tighten commissioning and pre-commissioning standards to meet current and projected Army requirements.

2. DISCUSSION.

a. Under the current system, USMA and OCS impose the most stringent screening requirements over their applicants. The ROTC, except for its scholarship students (about three percent of ROTC cadets), imposes virtually no initial screening requirements over its participants.

b. Improvements can be initiated which will better identify those individuals who are willing to commit themselves to the officer producing programs, able to complete the requirements of those programs and ultimately, fully meet all commissioning standards.

c. Before adequate standards can be applied to the pre-commissioning program it is necessary to ensure that the current commissioning program has an adequate minimum standard for all commissioning sources. As the system examines the current commissioning standards and procedures it must adjust where necessary to meet the projected Army requirements. Some of the areas which should be examined are military skills, physical standard, PMS student evaluation, ROTC basic/advanced camp, competency in the "3R's," computer skills, and foreign language skills or aptitudes.

(1) Military Qualification Skills (MQS I).

(a) MQS I (see Appendix 1 to Annex H) should be consistent throughout USMA, ROTC, and OCS, to include the certification procedures.

(b) Currently there are 64 MQS tasks required of each cadet for certification and each task is considered of equal importance. Establishing critical tasks, with the objective of not exceeding 25 tasks, and providing more specific certification guidance will improve quality across all commissioning sources by requiring all certi-

fying officials to focus on the skills deemed to be most important for commissioning. A standard certification plan should be developed to provide certification guidance to the appropriate commissioning institution. Specific guidance must distinguish between critical tasks and common tasks. Implementation of these procedures can be phased over the next four years (see Action Plan at Appendix 3 for details).

(2) Physical Standards. The current physical fitness and active duty retention standards are not consistent with each other, (e.g., body fat). Regulations must be reviewed to ensure adequacy and be clear and consistent for all commissioning and pre-commissioning programs.

(3) PMS Evaluation. Currently, the PMS verifies an applicant's eligibility for the SROTC program prior to enrollment. Before graduation the PMS again verifies that the applicant has met requirements, to include verification of all MQS I tasks. Which of the 64 tasks receive the most attention is currently subject to the judgment of 316 PMS. By designating approximately 25 of the MQS I tasks as critical, and providing more detailed certification instructions, both the cadet and certifying official can more easily establish priorities within a "packed" pre-commissioning program. This is also the first step in developing expanded pre-commissioning and commissioning standards and the individual assessment program which will in turn improve the role of the PMS.

(4) ROTC Basic/Advanced Camp. Each ROTC region seperately maintains, develops and conducts a summer camp for their particular region with general guidance from TRADOC. As pre-commissioning and commissioning standards are expanded and the Common Core concept is implemented in the service schools, the TRADOC guidance for standardization of summer camps must become more specific. Also, the individual assessment program will have an impact on the composition of the camp program.

(5) Competency in the Basic Education Skills of Reading, Writing and Arithmetic (3R's). The PDOS survey indicates a need for improvement within the 3R's. PDOS recommends, in co-ordination with TRADOC's effort to establish the 3R's achievement testing, that the 3R's be a part of the pre-commissioning and commissioning standards with emphasis on assisting those who may have problems. This effort is in conjunction with the establishment of an individual assessment program (see Annex H, Assessment) Tab A to this appendix contains additional discussion on this topic.

(6) Computer Skills.

(a) Currently, there is no requirement for ROTC or OCS students to take a computer basic-skills course. USMA cadets are required to complete one semester of computer science regardless of their academic discipline.

(b) Before developing a computer-skills training program, computer literacy for Army officers must be defined and then the standards and requirements developed. It should be noted that computer training and the associated resources are currently spread throughout the TRADOC school system without a standard or basis. As computers become more commonplace, basic computer knowledge will be as important as the 3R's.

(7) Foreign language skills or aptitudes.

(a) Presently, USMA requires that cadets in the engineering program take two semesters of a foreign language while cadets in the social sciences take three semesters. All ROTC scholarship students are required to complete one term of language training prior to graduation. Requirements for language training for other ROTC cadets is not required, but encouraged. OCS has no requirement for foreign language training.

(b) Before expanding the foreign language training program, it must be determined if there are shortages of qualified linguists produced by the current commissioning program to meet valid requirements (see Action Plan, Appendix 4).

d. The development of a pre-commissioning and commissioning assessment program can provide numerous positive benefits for the individual and the Army Diagnostic testing would greatly assist the individual, cadre and Army branching planners identify aptitudes for certain branches, functional areas or skills—like computer science, 3R's, languages, etc. Sound empirical information appropriately developed can assist in meeting the goal of finding out what people are good at (or need help in) and then develop and exploit the strengths and improve the weaknesses.

e. The discussion above led PDOS to recommend the following policy complete with its sub-policies:

Commissioning standards will be tightened and tied to an assessment program:

–Examine current commissioning standards and adjust to meet projected Army requirements (e.g., military skills, physical standard, PMS student evaluation, ROTC basic/advanced camp).

–Develop interim commissioning standards, as required in addition to current standards, to ensure that standards exist for all assessement categories to be measured under the new individual assessment program (e.g., 3R's, basic computer skills, foreign language) and for all skill, knowledge and proficiency requirements.

–Develop an individual assessment program which provides feedback to the individual and a mechanism for validating pre-commissioning and commissioning standards and determining how well the standards are being achieved.

f. Numerous sources including RETO and the OPMS Study indicate a need for improved pre-commissioning standards for ROTC. Minimum common selection standards should be established for ROTC, USMA and OCS. These standards should be compatible for each commissioning source and tied to the individual assessment program. The feedback from this program will assist the individual in his self-development efforts and provide the system an evaluation of his qualifications, as well as what remedial training may be necessary prior to commissioning. This leads into the next PDOS policy pertaining to this development period:

Minimum standards for entry into all pre-commissioning programs will be uniform, based on commissioning standards and tied to the individual assessment program.

–Examine current pre-commissioning standards for ROTC, USMA, OCS and adjust their standards where applicable to meet the minimum pre-commissioning standards.

–Develop an individual pre-commissioning assessment program which provides feedback to the individual, assists in evaluating his qualifications and provides the system a mechanism for developing remedial training programs

g. In addition to those common commissioning standards, each branch should establish branch-specific commissioning standards (if feasible and required). This would expedite the branch-selection process by allowing the individual and the institution to assess his abilities and potential to attain specific branch standards. Another influencing factor on individual branch selection during pre-commissioning training is the cadre. The branch mix of cadre at each institution should be based, in part, on the branch production mission of the institution with the aim of assisting in the recruiting effort by providing a role model and mentor. Based on this rationale, the following three policies were developed:

Branching selection prodecures will consider the qualifications of each individual measured against an established set of standards required by each branch. Develop a set of branch-specific commissioning standards for each branch which are compatible with basic commissioning standards.

Assignment of cadre to institutions will be based, in part, on the branch production mission of the institution.

All ROTC cadre will attend a formal training course prior to assuming duties.

3. CSA REMARKS. None.

TABS
A — 3R'S/Officer Selection Battery (OSB)
B — Computer Skills Training
C — Foreign Language Training

Tab A to Appendix 1

3R'S/Officer Selection Battery (OSB)

1. PURPOSE. To provide rationale for 3R's testing and the use of the Officer Selection Battery (OSB).

2. DISCUSSION.

a. A number of sources indicate that perhaps as much as 20-30 percent of the company grade officers in the Army today are not able to perform the basic education skills of reading, writing and mathematics at the 12th grade level. The precise number is not available as there is no uniform testing standard.

(1) PDOS survey data tends to suport this claim.

(a) Of the company grade officers surveyed 59 percent indicated that one-fourth more company grade officers within their organizations are deficient in the 3R's. Of the general officers surveyed, 64 percent gave the same response.

(b) General officers feel strongly that only officers proficient in the 3R's should be accessed into the army.

(2) Diagnostic testing at the branch schools in the OBC and/or OAC since June 1982 also supports the conclusion that some officers are deficient in the 3R's. However, these conclusions are not based on uniform test standards.

(a) Of the twelve branch schools reporting, only nine evaluated one or more of the basic education skills at the OBC level.

1. Eight different sets of test instruments have been used.

2. The established evaluation standards differ in all but three schools.

3. Evalution standards range from a low of the 11.0 grade to a high of the 14.0 grade level and, in one case, the standard is self-determined (average test score on each class is standard).

4. Disregarding the test instrument differences and the evaluation standard's inconsistency, in excess of 29 percent of the officers failed to meet a standard. Despite this fact, only about two percent of the officers failed to graduate from OBC. This percentage is slightly less than the three percent failure rate of the Infantry School which did no diagnostic testing.

(b) Eight of the twelve branch OAC schools reporting evaluate one or more of the basic education skills.

1. Six different test instruments have been used.

2. Evaluation standards vary from 11.00 grade level to 15.5 grade level. The Ordnance and Infantry Schools determined their own evaluation standards. The Armor School chose the 50th percentile level as its evaluation standard.

3. Disregarding the test instrument differences and the evaluation standard's inconsistency, in excess of 26 percent of the officers tested failed to meet a standard.

4. Officer Advances Course failure rates were not available.

(c) A summary of the 3R skills test results to date at OBC and OAC are found in Tables AA-1-A-1 and AA-1-A-2.

b. TRADOC has recognized the lack of uniformity in diagnostic testing programs within the OBC and OAC branch schools and has established, as of October 1984, both a common testing instrument and a uniform standard and placed the requirement on the branch schools to establish a remedial education program for all who do not meet established standards.

c. The results of the diagnostic testing of the 3R's, which indicated a high percentage of the entry-level officers deficient in 3R's, does not appear to have any correlation to the ability of the officer to sucessfully complete the OBC or OAC.

Several questions now arise that must be answered.

(1) What is the "Army standard" for 3R's?

(2) Which diagnostic testing instruments measure the Army standard?

(3) How do field grade officers compare to company grade officers in these areas?

(4) If the Army does nothing with test results, why test?

(5) Should test results be a factor in determining whether or not an officer graduates from OBC or OAC?

d. Officer Selection Battery (OSB).

(1) RETO found that commanders were concerned about the quality and trainability of some lieutenants from ROTC. Also, RETO noted the absence of a common gauge to measure the academic performance and leadership ability of cadets entering the Army ROTC program. Hence, RETO recommended the development and use of a standard written test to measure the officer potential of ROTC applicants. As a result of these findings, the Army Research Institute (ARI) developed and fielded the OSB. The OSB was field tested in SY 81-82 and again in SY 82-83. Data was collected and analyzed by ARI with the test results and normed test scores reported to TRADOC in the summer of 1983.

(2) The OSB was scheduled for implementation in February 1984; however, concerns were raised about its validity, the predictive value of mental testing and its impact on minorities. It was not implemented as a test measure in ROTC.

(3) Prior to February 1984, ROTC used the Cadet Evaluation Battery (CEB) as a mental screening test for MS III applicants who did not have SAT/ACT scores. It was thought a score of 80 on the CEB equated to an average college score of 850 on the SAT; however, it was discovered that the CEB correlated to a SAT score of only 650 (some statistics show correlation to SAT scores as low as 530). Virtually all applicants taking the CEB were able to score 80 or higher and qualified for entry into MS III/contract status although some did not possess a SAT/ACT score, or had a SAT score of less than 840. Testing determined that an OSB score of 97 correlated to an 850 SAT score which established a mental qualification standard. The use of the OSB as a mental screening test for all pre-commissioning programs would have resulted in a uniform mental qualification standard to enter ROTC, OCS and USMA.

(4) There is a "performance gap" between the system capabilities and people capabilities which must be closed if we are to sustain readiness. The decision not to use the OSB, or a similiar test, has left ROTC without a mental qualification standard except for a 2.0 academic grade point average. As SAT/ACT is not required by all colleges or universities, its use cannot be equitably and uniformly applied.

(5) Currently, TRADOC and The Army Research Institute (ARI) are developing an Achievement Testing Program. The test will examine reading, English expression and mathematic skills. The results will be used to develop preliminary pre-commissioning achievement criteria for use in the ROTC admissions and commissioning process. Eventually, achievement standards will be established based on data analysis conducted by ARI, however, data is inconclusive at the moment.

TABLE 1 (OBC)

School	Test Instrument	Type	Class Size	Test Number	Instrument Failures Percentage	Standard	Number of Class Failures
Ordnance	Test of Adult Basic Ed (TABE)	3R's	346	159	46.0%	12.9	16
Transportation	TABE	3R's	413	121	29.3%	11.0	3
Chemical	Coop English Test & TABE (Math)	3R's	356	85	23.9%	13.0	13
Signal	Nelson-Denny	Read	810	98	12.1%	12.0	8
Air Defense	Nelson-Denny Coop English	Read Write	1202	655	54.5%	14.0	25
Quarter Master	California Achievement	3R's	668	171	25.6%	12.0	16
Field Artillery	Sequential Test of Ed Progress	3R's	2418	402	16.6%	Mean Score	NA
Military Police	Coop English Test	Read Write	883	182	20.6%	12.0	NA
Infantry	Locally Developed	Read Write	2335	*	*	*	67
Armor	Missouri College	Write	1989	783	39.4	51% (of college freshman in English)	-
Military Intelligence	No Test Instrument	-	1590	-	-	-	15 (46 recycled)
Chaplain	No Test Instrument	-	603	-	-	-	2

* Not tested

TABLE II (OAC)

School	Test Instrument	Type	Class Size	Test Instrument Failures		Standard
				Number	Percentage	
Ordnance	Self-devised	3R's	148	39	26.4	Self-devised
Trans	TABE	3R's	320	101	31.6	11.0
Chemical	Coop English Test TABE (math)	3R's	205	48	23.4	12.9
Signal	Nelson-Denny	Read	197	-	29-41%	15.1-15.5 grade
Air Defense	Nelson-Denny	Read	530	334	63.0%	14.0
Quarter Master	Calif Achievement	*	*	*	*	*
Field Artillery	Sequential Test of Ed Program	*	*	*	*	*
Military	Coop English Test	Read Write	481	42	8.7	12.0
Infantry	Locally Developed	Read Write	1326	256	19.3	70%
Armor	Missouri College	Read	695	193	27.8	51% of college freshman (est 13.3)
	Nelson/Denny	Write	(569)	(37)	(6.5)	14.0
Military Intelligence	No Test Instrument	-	-	-	-	-
Chaplain	No Test Instrument	-	-	-	-	-

* Not tested

Tab B to Appendix 1

Computer Skills Training

1. PURPOSE. To establish policies and procedures to improve computer skills training.

2. DISCUSSION.

a. Currently, there is no requirement for ROTC or OCS students to take a computer basic skill course. USMA cadets are required to complete one semester of computer science regardless of academic discipline.

b. Schools such as Stanford Business School, University of Pennsylvania Wharton School, Harvard and others have begun an aggressive effort to apply computer use in the classroom and for study outside the classroom. As technology rapidly progresses, the ability to use the computer will be no different than being able to apply the 3R's.

c. The Army has a number of schools (both OBC and OAC) that have begun to apply the use of computers in their POIs. Therefore, it seems reasonable to expect that the next generation of officers should possess at least basic computer skills to use in future jobs and assignments.

d. Before a computer skills training program can be developed, requirements and standards must be defined.

3. RECOMMENDATIONS. The following policies were developed to be included with pre-commissioning and commissioning standards:

a. OACSIM develop standards and requirements for computer literacy for all officers and pass to ODCSPER and TRADOC for development of computer skill and literacy assessment and training programs.

(1) OACSIM develop basic computer skill requirements for each professional development level.

(2) ODCSPER review and validate computer skills commissioning standards.

(3) ODCSPER/TRADOC ensure ROTC, USMA, and OCS computer skills programs produce individuals who meet the standard.

(4) ODCSPER/TRADOC develop and implement assessment and remedial training program to meet standards and requirements.

b. TRADOC, assisted by the ROTC Study Group, develop, validate and implement a basic computer skills program.

c. TRADOC determine if it is appropriate to add a basic computer skills course to the Professional Military Education of MQS I and drop one of the current requirements.

d. TRADOC develop, validate and implement a basic computer skills course at OBC/OAC as the individual assessment program demonstrates a need.

Tab C to Appendix 1

Foreign Language Training

1. PURPOSE. To provide rationale for PDOS recommendations made in Annex AA.

2. DISCUSSION. An analysis conducted by PDOS on foreign language led to several policy recommendations. The rationale for some language training is discussed in this Appendix.

a. Foreign language skills are an essential part of the Army at a variety of competence levels. There is clearly a need for linguistic capabilities for those who deal in intelligence matters or whose duties (e.g. attaches and advisors) put them in constant contact with representatives of non-English speaking nations.

b. As a practical matter, language training is generally time consuming and relatively expensive with the skills becoming perishable unless they are frequently practiced. Thus, perhaps it is not cost effective for all to have language training prior to commissioning.

c. Currently, USMA requires cadets in the engineering program take two semesters of a foreign language while cadets in the social sciences are required to take three semesters. ROTC scholarship students are required to complete one semester or one quarter of language training prior to graduation. The remaining ROTC cadets are not required to take any language, but are encouraged when feasible.

3. RECOMMENDATIONS.

a. OACSI examine the current program to determine if there are shortages of required linguists produced by current commissioning programs.

b. OACSI/ODCSPER determine the desirability of requiring some language training for all individuals prior to commissioning.

(1) Examine language decay rate.

(2) Determine impact on ROTC program (e.g., course load and flexibility for engineers vice liberal arts students).

c. All individuals, in conjunction with the individual assessment program at OBC, will be given an exam to determine language fluency or language learning ability.

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Appendix 2 to Annex AA

Glossary

1. School Year (SY)
   Academic Year (AY)

   A period normally incompassing two semesters or equivialant. Ensuing vacation period or summer session is not normally included.

2. Defense Language Institute/Foreign Language Center (DLIFLC)

   Located at Monterey California, and provides language skills training for DOD personnel.

3. Military Qualification Standard (MQS I)

   A systematic officer education and training program recommended by RETO. MQS I provides a framework for the pre-commissioning years an individual serves in OCS, ROTC, or USMA. MQS I provides individuals with the common military skills/knowledge they will need to begin basic entry into the Officer Basic Course (OBC).

4. Defense Language Aptitude Battery (DLAB)

   A test which determines if an individual has the ability to learn a Foreign Language.

5. Professional Military Education (PME)

   A portion of MQS I which requires an individual to complete one undergraduate course from each of the following designated fields of study:

   Written Communications
   Human Behavior
   Military History

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J01 DEVELOPMENT PERIOD O - o Examine current commissioning standards and procedures and adjust to meet projected Army requirements (e.g., military skills, physical standard, PMS student evaluation, ROTC basic/advanced camp).	**Military Skills (MQS I)** oo Insure that MQS I is consistent with the commissioning standard.	TRADOC	1Q FY 86	
	ooo Insure USMA and OCS MQS I certification procedures are consistent with the commissioning standard.	ODCSPER (P) TRADOC	1Q FY 86	
	ooo Establish critical MQS I tasks with objective of not exceeding 25 total critical tasks.	TRADOC	1Q FY 86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	ooo Review MQS I common tasks with the objective of reducing the number of tasks required.	TRADOC	4Q FY 88	
	ooo Develop and approve ROTC standardized certification plan.	TRADOC	4Q FY 86	
	ooo Provide certification guidance.	TRADOC	3Q FY 87	
	oooo Each PMS will certify all critical tasks.	TRADOC	3Q FY 87	
	oooo Each PMS will follow standard procedures for certification of all other common tasks.	TRADOC	3Q FY 87	
	oo Total MQS I implementation.	TRADOC	1Q FY 89	
	Physical Standards			
	oo Ensure physical fitness entrance standards for entry into pre-commissioning programs and commissioning are consistent with the active duty retention standard.	ODCSPER	4Q FY 85	
	PMS Evaluation			
	oo Establish the PMS Student Evaluation Standard.	ODCSPER	4Q FY 85	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	ooo Develop a PMS student evaluation process which includes the standard procedure for evaluating the commissioning standards and pre-commissioning program.	TRADOC	4Q FY 86	
	ooo Assess and validate student evaluation process at selected schools.	TRADOC	4Q FY 88	
	ooo Implement evaluation process.	TRADOC	4Q FY 89	
	ROTC Basic/Advance Camp			
	oo Ensure that ROTC basic/advanced camp goals are consistent with the current commissioning standards.	TRADOC	1Q FY 86	
	ooo Ensure the interim standards for the commissioning program and the assessment procedures for the individual assessment program are compatible with the camp experience.	TRADOC	1Q FY 87	
	ooo Standardize the basic and advanced camps in all regions.	TRADOC	1Q FY 88	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
o Develop interim commissioning standards, as required, in addition to current standards, to insure that standards exist for all assessment categories to be measured under the new individual assessment program (e.g., 3R's, Basic Computer Skills, Foreign Language) and for all skill, knowledge and proficiency requirements.	oo Ensure that some standards exist for measurement under each category in the individual assessment program.	ODCSPER	2Q FY 86 (continuous)	
	ooo Ensure these standards are applied to ROTC, USMA and OCS where applicable.	ODCSPER	3Q FY 86	
	oo Develop interim standards, as required, for skill, knowledge and proficiency requirements.	ODCSPER	3Q FY 86	
	oo Develop a pre-commissioning computer skill diagnostic test and development program which is consistent with the commissioning standard.	TRADOC	2Q FY 88	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	oo Insure interim standards for both the commissioning and pre-commissioning programs are tied to the assessment instrument and procedures of the individual assessment program.	TRADOC	1Q FY 87 (continuous)	
	ooo Develop, test, validate interim standards.	TRADOC	2Q FY 89	
	oo Approve interim standards for inclusion in the individual assessment program.	TRADOC	1Q FY 90 (continuous)	
	oo Designate interim standards as permanent standards when validated.	TRADOC	2Q FY 90 (continuous)	
	3R's			
	oo Establish an interim commissioning standard for 3R's (reading, writing and mathematics).	ODCSPER (P) TRADOC	4Q FY 85	
	ooo Ensure standards and current testing programs are compatible.	ODCSPER (P) TRADOC	4Q FY 85	
	oo Ensure diagnostic testing instruments measure the established commissioning standard.	ODCSPER (P) TRADOC	4Q FY 85	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	ooo Ensure standard for current TRADOC achievement testing program is consistent with the commission-ing standard.	TRADOC	4Q FY 86	
	ooo Establish remedial program to assist in remediation needs for those who do not achieve initial standard.	TRADOC	4Q FY 86	
	o Assess, validate and refine 3R's testing at selected institutions.	TRADOC	4Q FY 87	
	o Approve interim standard for commissioning program.	ODCSPER	4Q FY 89	
	o Designate interim standards as permanent.	TRADOC	4Q FY 90	
	o Include the standard and assessment methodology in the common core.	TRADOC	4Q FY 90	
	Computer Skills			
	o Develop an interim commissioning standard and tie to standard being developed for each professional development level.	ACSIM(P) TRADOC ODCSPER	3Q FY 86	
	o Establish a computer skills program that is consistent with the standards.	ODCSPER (P) TRADOC ACSIM	3Q FY 87	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	oo Develop a precommissioning computer skill diagnostic test and development program which is consistent with the commissiong standard.	TRADOC	2Q FY 88	
	ooo Validate computer skill diagnostic test and development program at selected test institutions.	TRADOC	4Q FY 89	
	ooo Evaluate the merits of adding a computer basic course to the Professional Military Education (PME) of MQS I and dropping one of the current requirements.	TRADOC	4Q FY 90	
	oo Implement complete computer skill diagnostic test and development program which is compatible with the commissioning standard, pre-commissioning program and the individual assessment program.	TRADOC	1Q FY 91	
	o Include the standard and assessment methodology in the common core.	TRADOC	1Q FY 91	
	Foreign Language oo Examine current program to determine if there are shortages of justified linguists produced by current commissioning programs.	OACSI	4Q FY 85	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	ooo Validate standards and current and projected requirements for foreign language at commissioning and in the pre-commissioning program.	ODCSPER(P) OACSI	4Q FY 85	
	ooo Determine the desirability of acquiring some language training for all individuals prior to commissioning.	OACSI	4Q FY 85	
	oooo Determine relationship between USMA and ROTC in meeting require-ments.	ODCSPER	4Q FY 85	
	oooo Determine impact on ROTC program (e.g., course load and flexibility for engineers vice liberal arts students).	TRADOC	4Q FY 86	
	oo Assess impact of an expanded foreign language requirement for pre-commissioning programs.	TRADOC	4Q FY 86	
	oooo Examine foreign language decay rate.	ARI	4Q FY 86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	oooo Examine impact of additional foreign language requirements on academic road, course length and student attrition.	TRADOC	1Q FY 87	
	oo Develop and implement revised foreign language standards and procedures for determining commissioning requirements.	TRADOC	3Q FY 88	
	ooo Develop program for individuals in conjunction with the commissioning program and OBC whereby all will be given an exam to determine ability (DLAB).	TRADOC	3Q FY 88	
Develop an individual assessment program which provides feedback to the individual and a mechanism for validating pre-commissioning and commissioning standards and determining how well the standards are being achieved.	oo Develop an individual assessment program that provides feedback; and a mechanism for validating the pre-commissioning standards.	ODCSPER (P) TRADOC	2Q FY 86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J02 Examine current pre-commissioning standards for ROTC, USMA, OCS and ensure their standards meet common minimum standards for pre-commissioning.	oo Ensure current TRADOC achievement testing program is compatible with the assessment program.	TRADOC	2Q FY 85	
	ooo Validate the individual assessment program and pre-commissioning standards at selected schools.	TRADOC	2Q FY 90	
	oo Implement individual assessment program for all schools (pre-commissioning standard)	TRADOC	3Q FY 91	
	oo Ensure that USMA, ROTC and OCS standards are compatible, and tied to the individual assessment program.	ODCSPER (P) TRADOC	1Q FY 86	

NOTES:

Appendix 3 to ANNEX AA
Action Plan

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	oo Establish precommissioning standards which are compatible with the revised commissioning standards and tied to the individual assessment program.	TRADOC(P) ODCSPER	1Q FY 87	
	ooo Develop standard computer skills and language aptitude tests to be used as part of the initial entry standards for the pre-commissioning program.	TRADOC (P) ODCSPER	4Q FY 88	
	ooo Test and validate basic and entry standards at selected schools.	TRADOC (P) ODCSPER	4Q FY 88	
	o Establish a test control collection agency for collection and evaluation of data from the pre-commissioning program and the individual assessment program.	ODCSPER (P) TRADOC	1Q FY 90	
	o Implement basic standards for entry into pre-commissioning programs.	ODCSPER (P) TRADOC	3Q FY 91	

NOTES:

AA-3-11

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP	REQUIRED COMPLETION	NOTES
Develop individual pre-commissioning assessment program which provides feedback to the individual, assists in evaluating his qualifications, and provides the system a mechanism for developing a remedial training program.	o Develop an individual assessment program.	ODCSPER	1Q FY 86	
	o Establish an individual assessment program that validates the standard, the qualifications of the individual and provides feedback for self-development.	TRADOC (P) ODCSPER	1Q FY 87	
	oo Develop a remedial training program for ROTC to assist those individuals who do not meet the standards.	TRADOC	2Q FY 88	
	oo Test and validate individual assessment program and remedial training program at selected schools.	TRADOC (P) ODCSPER	3Q FY 88	
	oo Insure current TRADOC achievement testing program compatible with this effort.	TRADOC	1Q FY 89	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J03 Develop a set of branch-specific commissioning standards for each branch which are compatible with basic commissioning standards.	oo Implement individual assessment program for all schools (precommissioning program).	TRADOC(P) ODCSPER	3Q FY 91	
	oo Evaluate merit of branch-specific to commissioning standards in addition the basic commissioning standards.	ODCSPER	1Q FY 86	
	oo Ensure branch selection methodology is compatible for ROTC, USMA and OCS.	ODCSPER	2Q FY 86	
	oo Develop methodology which gives priority to qualified cadets requesting combat arms as their first choice, regardless of academic discipline.	ODCSPER	2Q FY 86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	ooo Develop methodology which allows qualified cadets requesting combat service or combat service support (i.e., engineers, ordnance, signal) their first choice if not in conflict with academic discipline and technical requirements.	ODCSPER	2Q FY 86	
	ooo Develop and validate an assessment series which measures interests, aptitude and potential of individuals for commissioning in a particular branch.	TRADOC (P) ODCSPER	1Q FY 89	
	ooo Once assessment series is validated, determine which instruments are appropriate for inclusion in the branch selection process.	TRADOC (P) ODCSPER	1Q FY 89	
	oo Expand individual assessment program to include branch-specific standards (e.g., interest, aptitude, potential) in the pre-commissioning assessment program.	TRADOC	3Q FY 90	
	ooo Upon validation, determine appropriate instruments for inclusion in the branch selection process.	TRADOC	3Q FY 90	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J04 Branch mix of cadre at each institution will be based, in part, on the branch production mission of the institution with the aim of assisting in the recruiting effort by providing a role model and mentor.	oo Implement branch selection procedures standards.	TRADOC	3Q FY 91	
	o Establish a policy for assigning branch mix of cadre at each institution based on branch production mission of the institution.	ODCSPER	4Q FY 85	
	o Ensure ROTC cadre selection methodology is compatible with that of USMA and OCS.	ODCSPER (P) TRADOC	4Q FY 85	
	o Determine if there is a valid method of identifying those institutions which have a propensity to produce a particular branch (e.g., engineers or infantry).	TRADOC	2Q FY 86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J05 Objectives for the training of ROTC cadre will be compatible with USMA and OCS cadre training goals.	ooo Assess value of current affiliation program and potential for expansion of the program.	TRADOC	2Q FY 87	
	oo Establish a policy that requires training of all cadre prior to assignment to an institution.	TRADOC	4Q FY 85	
	oo Validate current improved instructor training course.	TRADOC	4Q FY 85	
	oo Develop a formal cadre training course that is consistent throughout all regions and institutions.	TRADOC	3Q FY 86	
	ooo Cadre training course will include a phase to be conducted at each ROTC region Hq.	TRADOC	1Q FY 87	

NOTES:

AA-3-16

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	oooo Each region develop a 1-2 day program that encompasses the region mission, resources available, and a overview of ROTC institutions in the region.	TRADOC	3Q FY 87	
	ooo Ensure each ROTC institution cadre develope a standard overview of its mission.	TRADOC	4Q FY 87	
	o Implement formal training program.	TRADOC	1Q FY 88	

NOTES:

Appendix 4 to ANNEX AA

PHASING PLAN

AA-4-1

J02 MINIMUM STANDARDS FOR ENTRY INTO ALL PRECOMMISSIONING PROGRAMS WILL BE UNIFORM, BASED ON COMMISSIONING STANDARDS AND TIED TO THE INDIVIDUAL ASSESSMENT PROGRAM.

EXAMINE CURRENT PRE-COMMISSIONING STANDARDS FOR ROTC, USMA, OCS AND ADJUST THEIR STANDARDS WHERE APPLICABLE TO MEET STANDARDS FOR PRE-COMMISSIONING.

DEVELOP INDIVIDUAL PRE-COMMISSIONING ASSESSMENT PROGRAM WHICH PROVIDES FEEDBACK TO THE INDIVIDUAL, ASSISTS IN EVALUATING HIS QUALIFICATIONS, AND PROVIDES THE SYSTEM A MECHANISM FOR DEVELOPING REMEDIAL TRAINING PROGRAM.

	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
RESOURCES												
STUDENTS NR/MY				0/1								
STAFF AND FACULTY—MIL/CIV					0/1	0/5	0/5					
TDA CHANGE—$ MILLIONS			.1	.1	.1	.5	.2	.2	.2			

AA-4-2

PHASING PLAN

Timeline phases (FY81–FY96): TEST / ASSESS — VALIDATE — ESTABLISH BRANCH STANDARD — REFINE — IMPLEMENT

RESOURCES	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY												
STAFF AND FACULTY-MIL/CIV												
TDA CHANGE-$ MILLIONS			.1	.1	.1							

J03 BRANCHING SELECTION PROCEDURES WILL CONSIDER THE QUALIFICATIONS OF EACH INDIVIDUAL MEASURED AGAINST AN ESTABLISHED SET OF STANDARDS REQUIRED BY EACH BRANCH.

DEVELOP A SET OF BRANCH-SPECIFIC COMMISSIONING STANDARDS FOR EACH BRANCH WHICH ARE COMPATIBLE WITH BASIC COMMISSIONING STANDARDS.

Appendix 4 to ANNEX AA

PHASING PLAN

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96

ESTABLISH BRANCH POLICY

DEVELOP BRANCH POLICY

TEST VALIDATE

DETERMINE IMPLEMENT

RESOURCES	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY												
STAFF AND FACULTY—MIL/CIV												
TDA CHANGE—$ MILLIONS												

JO4 ASSIGNMENT OF CADRE TO INSTITUTIONS WILL BE BASED, IN PART, ON THE BRANCH PRODUCTION MISSION OF THE INSTITUTION.

BRANCH MIX OF CADRE AT EACH INSTITUTION WILL BE BASED, IN PART, ON THE BRANCH PRODUCTION MISSION OF THE INSTITUTION WITH THE AIM OF ASSISTING IN THE RECRUITING EFFORT BY PROVIDING A ROLE MODEL AND MENTOR.

PHASING PLAN

DEVELOP POLICY FOR FORMAL CADRE TNG

ESTABLISH POLICY FOR CADRE TNG

SIGN COURSE

WITHDRAW REGION

IMPLEMENT

	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
RESOURCES												
STUDENTS NR/MY												
STAFF AND FACULTY-MIL/CIV												
TDA CHANGE-$ MILLIONS	1.2		1.21	1.209	1.2							

JO5 ALL ROTC CADRE WILL ATTEND A FORMAL TRAINING COURSE PRIOR TO ASSUMING DUTIES.

O OBJECTIVES FOR THE TRAINING OF ROTC CADRE WILL BE COMPATIBLE WITH USMA AND OCS CADRE TRAINING GOALS.

Author: LTC Pennington
Team Chief: COL Johnson

Annex BB

Development Period: The Lieutenant

1. PURPOSE. To describe the education/training experiences, as well as the assignment requirements, needed to develop a lieutenant who is expert in branch skills at the platoon or equivalent level.

2. DISCUSSION.

a. Background.

(1) The development period for lieutenants begins upon commissioning and ends approximately three and one-half years later upon promotion to captain. During this period of time the officer undergoes a change from holding basic civilian attitudes to adopting the values and attitudes of an Army officer. The core foundation of officer values is set and the first real contact with Army units and missions occurs. The officer, as a platoon leader, first experiences direct responsibility not only for equipment, but especially for leading soldiers. Also, the lieutenant observes what captains and field grade officers do and gets his first indication of what will be expected of him in the future. It is during this period that the officer will make his first decision to voluntarily extend his committment to the service or to return to civilian life.

(2) During this development period, the lieutenant normally is trained only in his basic branch. It is essential that he become totally qualified in his branch at the platoon or equivalent level. This is best accomplished by resident training at a branch basic course followed by a field assignment with troops in his branch. Special training courses that enhance the officer's self-confidence, physical competence and leadership ability (such as Ranger or Airborne) complement the branch skills of all officers and should take place during this period.

b. Type Duties. Lieutenants come into the Army at the first line supervisor level. They command platoons in many branches, and provide leadership and specialized branch knowledge in all duty positions in their branch. It is essential

for every lieutenant to perform in a branch duty position at the lowest organizational level for an extended period of time (ideally, 18 months minimum) so he builds a base of practical branch related experience early in his career.

c. Frame of Reference. Lieutenants come into the Army with a largely civilian and non-supervisory orientation. As Army officers serve in leadership and supervisory capacities, this orientation must evolve into that of a military officer. Development of this frame of reference is summarized in the following brief discussion of what an officer should BE, KNOW and DO at the end of the Lieutenant Development Period.

(1) BE. Lieutenants exhibit officer values and have begun to internalize them. Their branch related experiences at low Army organizational levels (e.g., platoon, company, and battalion or equivalent levels) ensure that they understand their role in the Army. They enhance their ability to handle physical and mental stress, serve as coaches for their subordinates and display a clear mission focus.

(2) KNOW. Lieutenants learn about human nature through experience and apply the principles of leadership doctrine during that experience. They become experts in their branch related skills at platoon or equivalent level and hone the general military skills and knowledge through continued study and practical experience.

(3) DO. Lieutenants apply their leadership skills by working directly with soldiers and by developing their subordinates into teams. They receive guidance, take action based on that guidance and follow through to ensure the job is done well.

d. Schooling and Related Development Period Experiences.

(1) To prepare newly commissioned officers for their first duty assignment, lieutenants attend an Officer Basic Course (OBC) in their

branch. The OBC prepares them for training individuals, teams, squads and platoons and includes sufficient instruction to provide an understanding of the environment of the company/battery/troop, including its tactics, organization and administration. During OBC, lieutenants are introduced to MQS II which defines the common military skills and tasks in which they need to become proficient prior to promotion to captain.

(2) After the OBC sets the foundation for the new lieutenant, he must apply what he has learned. To become an asset to his basic branch, that experience should be in a unit that provides the opportunity to solidify branch skills as well as to practice basic leadership skills.

e. Roles and Methods in the Development of the Lieutenant.

(1) Development Roles. Lieutenants assume responsibility for their own learning and professional development. Mentors assist lieutenants by stressing hands-on experiences and helping them to keep current in branch related subjects. Mentors also exemplify professional values and assist lieutenants in understanding and internalizing them. Units and organizations provide professional development opportunities via a command climate that is conducive to learning, creativity, and initiative. Finally, service school instructors and mentors model professional values and conduct experiential training designed to prepare lieutenants for their first assignment.

(2) Methods to Emphasize. Lieutenants learn best through experience, especially practical field experiences at low organizational levels where they can learn by doing. Lieutenants also benefit from thoughtful reflection on, and discussion of, their professional readings and from computer assisted instruction packages, when this technology becomes generally available.

f. Aim and Major Thrusts.

(1) Aim. The aim of this development period is to develop a lieutenant who is expert in branch skills at the platoon or equivalent level through education, training, self-development and assignments.

(2) Thrusts. The major thrusts for this period are to:

–Ensure all officers attend OBC followed by branch assignment with troops (goal of 18 months minimum as platoon leader or equivalent).

–Institute a Common Core across all OBC's.

–Verify MQS II skill qualification.

–Develop/provide appropriate self-development tools to the individual officer (e.g., professional development publications, individual assessment program).

g. Reference. Refer to Volume I, Annex A for the Development Period: Lieutenant spreadsheets that define the officer attributes, detailed development period policies, list specific education and training methods to use, assign professional development roles and describe the current and near term future environment for officers during this development period.

3. RECOMMENDATIONS. The base policies for this period are:

a. The OBC will be a resident experience for all officers (AC and RC) upon entry into commissioned service to set the core foundation for officer values and skills, to provide branch training/knowledge and provide initial professional development guidance. It will also assist in the validation process for commissioning standards (see Appendix 1).

b. The first assignment after attendance at OBC for all lieutenants will be to a branch material position, preferably with troops, with the exception of those selected to pursue specialized education or assignmnts (see Appendix 2).

4. CSA REMARKS. The CSA approved, in concept, the base policies for this development period with the exception that he wanted more flexibility in assignment of lieutenants to their first positions. The base policy on assignments has been changed accordingly.

Appendices

1 Officer Basic Course
2 Assignment Policy
3 Action Plan
4 Phasing Plan

Author: LTC Pennington
Team Chief: COL Johnson

Appendix 1 to Annex BB

Officer Basic Course

1. PURPOSE. To provide supporting policies and rationale for attendance at a branch Officer Basic Course (OBC).

2. DISCUSSION.

a. To prepare newly commissioned officers for their first duty assignment, lieutenants attend an OBC in their branch. The OBC prepares them for training individuals, teams, squads and platoons and includes sufficient instruction to provide an understanding of the environment of the company/ battery/troop including its tactics, organization and administration. This is the objective currently listed in DA Pam 600-3, but it is necessary to reiterate the importance of the OBC for all officers and thus, the following policy was developed.

The OBC will be a resident experience for all officers (AC and RC) upon entry into commissioned service to set the core foundation for officer values and skills, to provide branch training/knowledge and provide initial professional development guidance. It will also assist in the validation process for commissioning standards.

b. This broad policy is supported by sub-policies that direct specific actions, to include reviews of course content and POI's, and provide direction on what should be incorporated into the OBC experience.

(1) To formalize this policy, ODCSPER direct that all newly commissioned officers will attend their branch OBC prior to their first assignment.

(2) To refine the current branch OBC's and to ensure compatiblilty between OBC's at different service schools, as well as compatibility between courses taught at different levels, that:

(a) TRADOC review all branch school POI's to determine proper course length and content to ensure properly trained lieutenants are sent to the field.

(b) TRADOC develop and implement a Common Core (see Annex O, Common Core) in all branch school POI's that is compatible with the common skills, proficiencies and knowledge required of all officers (e. g., basic warfighting, critical common MQS tasks, professional values).

(c) TRADOC review the platoon trainer/ platoon TAC concept to incorporate advantages in all OBC's.

(3) To support the concept of assessments for officers (see Annex H), TRADOC implement MQS II.

(4) To support the Professional Development (PD) of officers (see Annex H) that:

(a) TRADOC issue an initial set of PD support material to all OBC attendees.

(b) Proponents provide instruction on the PD system to include an explanation of the individual assessment program, the PD roadmap, PD notebook and their importance and role in self-development.

(5) The detailed implementation plan with supporting actions, responsible agencies and required completion dates for each of these policies is at Appendix 3.

Author: LTC Pennington
Team Chief: COL Johnson

Appendix 2 to Annex BB

Assignment Policy

1. PURPOSE. To provide supporting policies and rationale concerning the officer's first assignment.

2. DISCUSSION.

a. After OBC sets the foundation for the new lieutenant, he must go out to apply what he has learned. To become an asset to his basic branch, that experience should be to a unit that provides the opportunity to exploit branch skills as well as to establish basic leadership skills. Consequently, the following policy was developed.

> The first assignment after attendance at OBC for all lieutenants will be to a branch material position, preferably with troops, with the exception of those selected to pursue specialized education or assignments.

b. This broad policy is also supported by sub-policies that direct actions to be taken for implementation.

(1) Realizing that all branches do not have the same type positions for lieutenants, and to attempt to ensure comparable career opportunities, TRADOC determine those positions authorized for lieutenants that are branch material and support the development of the new lieutenant.

(2) In order to develop solid leadership characteristics, OCDSPER establish as a goal that each lieutenant be a platoon leader for 18 months. (For those branches without platoons, or with insufficient platoons, duty should be in company level units or as low as possible in staff positions in TOE or TDA units involving branch related duties with soldiers.)

(3) To support the new OPMS policies, and to provide equitable branch opportunities, MILPERCEN ensure that officers who are branch transferred at three years of service are not assigned in the new branch until the officer has attended that branch advanced course.

(4) In line with the total Army concept, OCAR evaluate the impact of bringing all Reserve Force Duty (RFD) officers on active duty for a two year period (see Annex HH).

(5) The detailed implementation plan with supporting actions, responsible agencies and required completion dates for each of these policies is at Appendix 3.

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J10 The OBC will be a resident experience for all officers (AC/RC) upon entry into commissioned service to set the core foundation for officer values, skills, provide branch training/knowledge and initial professional development guidance. It will also assist in the process for validation of commissioning standards.				
ODCSPER direct that all newly commissioned officers must attend their branch OBC prior to first assignment.	a. Publish policy. b. Advertise policy. c. Implement policy.	a. ODCSPER b. MILPERCEN c. MILPERCEN	a. 4QFY86 b. 2QFY86 c. 1QFY87	
TRADOC review current OBC POI and length of course to ensure that properly trained LT's are sent to the field.	a. Review/define proficiencies required of officers upon promotion to captain. b. Determine best methods of acquiring these proficiencies. (schoolhouse, unit, self-development). c. Develop mission statement for all OBC's.	a. Proponents b. Proponents c. Proponents	a. 4QFY85 b. 1QFY86 c. 2QFY86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	d. Determine proper course length to teach those proficiencies best acquired in the institution.	d. Proponents	d. 1QFY87	
	o Consider effect on officers and families, base operations and relationships between OBC and OAC policies in course length analysis.	Proponents	1QFY87	
	e. Determine whether OBC's should be TDY or PCS.	e. TRADOC	e. 2QFY87	
	o Establish policy that OBC will be TDY/PCS.	TRADOC	2QFY87	
	f. Refine OBC.	f. TRADOC (P) Proponents	f. 4QFY87	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
TRADOC develop and implement a Common Core in all branch school POI's that is compatible with the common skills, proficiencies and knowledge required of all officers (e.g., basic warfighting, critical common MQS tasks, professional values).	a. As common skills, proficiencies and knowledge requirements are identified, develop Common Core to support MQS II, basic warfighting, professional development.	a. Proponents TRADOC (P)	a. 4QFY86	
	b. Ensure compatibility and consistency of OBC, OAC and ANCOC Common Cores.	b. TRADOC	b. 4QFY86	
	c. Ensure Common Core skills and tasks are presented uniformly throughout TRADOC.	c. TRADOC	c. 3QFY87	
	d. Develop and implement initial Common Core in OBC.	d. TRADOC (P) Proponents	d. 4QFY87	
	e. Review and incorporate identified common skills.	e. TRADOC (P) Proponents	e. 4QFY89	
	f. Revise OBC common core.	f. TRADOC	f. 4QFY90	
	g. Implement revised OBC.	g. TRADOC	g. 2QFY91	
	h. Revise OAC Common Core as required.	h. TRADOC	h. 4QFY90	
	i. Evaluate NCO professional development and ensure formal training is consistent with officer professional development training.	i. TRADOC	i. 4QFY89	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
TRADOC review the platoon trainer/ platoon TAC concept to incorporate advantages in all OBC's.	a. Review concept at all Proponent schools.	a. Proponents	a. 1QFY86	
	b. Determine applicability of concept to OBC, by school; for TRADOC overall.	b. Proponents	b. 1QFY86	
	c. Conduct cost analysis to determine feasibility of instituting platoon TAC/trainer.	c. Proponents	c. 3QFY86	
	d. Determine increased personnel requirements to support this training concept.	d. Proponents	d. 3QFY86	
	e. Provide recommendation on implementation to TRADOC.	e. Proponents	e. 4QFY86	
	f. Decide extent of implementation.	f. TRADOC	f. 1QFY87	
	g. Program for implementation.	g. TRADOC (P) Proponents	g. 4QFY87	
	h. Prepare for implementation.	h. TRADOC	h. 4QFY88	
	i. Implement.	i. TRADOC	i. 4QFY88	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
TRADOC implement MQS II.	a. Obtain CSA formal approval of MQS II.	a. TRADOC	a. 2QFY85	
	b. Review, standardize and validate the critical tasks in MQS II.	b. TRADOC (P)	b. 4QFY86	
	- Designate no more than 50 tasks from the common tasks manual as critical.	Proponents	4QFY85	
	- Designate no more than 25 tasks from the branch task manual as critical.	Proponents	4QFY85	
	- Designate branch specific critical task certification procedures.	TRADOC (P) Proponents	1QFY86	
	- Establish standard format for all MQS II manuals.	TRADOC (P) Proponents ATSC	1QFY86	
	- Publish common critical task certification procedures.	TRADOC (P) ATSC	2QFY86	
	c. Standardize MQS II certification process for all proponents.	c. TRADOC (P) Proponents	c. 1QFY86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	d. Develop method of validating MQS II task certification process for officers beginning OAC as part of the individual assessment program.	d. TRADOC	d. 4QFY87	
	e. Implement MQS II.	e. TRADOC	e. 4QFY86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
TRADOC issue initial set of professional development support material.	a. Program for and provide books/material in support of MQS II.	a. Proponents	a. 4QFY86	
	b. Program for and provide initial subscription to professional journal.	b. Proponents	b. 4QFY87	
	c. Program for and provide initial issue of professional development roadmap.	c. Proponents	c. 4QFY87	
	d. Program for and provide initial issue of professional development notebook.	d. Proponents	d. 4QFY87	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
Proponent provide instruction on PD system to include explanation of individual assessment program, PD notebook, and their importance and role in self-devleopment.	a. Develop instructional material to introduce formalized training on the PD system, beginning with the current system—include instruction initially on MQS and assessment program.	a. Proponents	a. 1QFY87	
	b. Ensure commonality of instruction throughout school system.	b. TRADOC	b. 4QFY88	
	c. Implement instruction on PD system.	c. TRADOC	c. 4QFY88	
	d. As PD system develops, modify course of instruction to include the complete assessment/testing program, the purpose and use of the PD roadmap and the purpose and use of the PD notebook.	d. Proponents	d. Cont.	
	e. Update POI's.	e. Proponents	e. Periodic	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J11 The first assignment after attendance at OBC for all lieutenants will be to a branch material position, preferably with troops, with the exception of those selected to pursue specialized education or assignments.				
TRADOC determine those positions authorized for lieutenants that are branch material and support the development of the new lieutenant.	a. Review/define requirements for positions.	a. Proponents	a. 1QFY86	
	b. Identify positons, primarily in TOE army, that support development of the new lieutenant.	b. Proponents	b. 3QFY86	
	c. For proponents with minimal TOE lieutenant positions, identify positions in TDA that support development of lieutenants.	c. Proponents	c. 3QFY86	
	o Identify positions with troops whenever possible.	Proponents	3QFY86	
	o Provide selected troop positions to MILPERCEN.	Proponents	3QFY86	
ODCSPER establish as a goal that each LT be a platoon leader for 18 months. (For those branches without platoons, or with insufficient platoons, duty should be in company level units or as	a. Develop and implement a policy that first assignment for lieutenants will be to a platoon leader (or comparable position as identified by proponent).	a. ODCSPER	a. 2QFY87	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)–PRIMARY RESP.	REQUIRED COMPLETION	NOTES
low as possible in staff positions in TOE and TDA units involving branch related duties with soldiers.).	b. Publish policy that lieutenants will be utilized in branch material positions as identified by proponent.	b. ODCSPER	b. 3QFY87	
	c. Publish policy that LT's remain in initial branch material positions for at least 18 months.	c. ODCSPER	c. 3QFY87	
	d. Use all available media sources to emphasize to commanders at all levels that lieutenants need to have the branch material assignment.	d. ODCSPER	d. 4QFY87	
	e. Include this policy in PD roadmap.	e. ODCSPER	e. 4QFY87	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
MILPERCEN ensure that officers that are branch transferred at 3 YOS are not assigned in the new branch until the officer has attended that branch advanced course.	a. Implement OPMS policy on branching. b. Establish policy on attendance at OAC prior to 1st assignment after branching.	a. MILPERCEN b. MILPERCEN	a. Current b. 1QFY87	

NOTES:

Task labels (development/phasing items):

DEVELOPMENT PERIOD--THE LIEUTENANT

JI: THE OBC WILL BE A RESIDENT EXPERIENCE FOR ALL OFFICERS.

REVIEW POI.

IMPLEMENT MOS II.

ISSUE PD MATERIALS.

DEVELOP/IMPLEMENT AN OBC COMMON CORE.

REVIEW PLT TRAINER/TAC PROGRAM.

INSTITUTE INSTRUCTION ON PD SYSTEM.

Chart column headings: FY85 · FY86 · FY87 · FY88 · FY89 · FY90 · FY91 · FY92 · FY93 · FY94 · FY95 · FY96

Annotations within chart:
- DETERMINE METHODS — TASKS / MISSION / COURSE DESIGN
- DEVELOP REFINE — DECISION (TDY VS PCS) — BEGIN INSTRUCTION
- PROGRAM — ISSUE — MQS II — ISSUE NOTEBOOK - ROADMAP
- DEVELOP — ANALYSIS — COMPATIBILITY / UNIFORMITY / JOURNAL — VALIDATE - REFINE
- REVIEW — RECOMMEND — PLAN PROGRAM
- DEVELOP MATERIAL — COMMONALITY

RESOURCES

	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
STUDENTS NR/MY												
STAFF AND FACULTY—MIL/CIV												
TDA CHANGE—$ MILLIONS	.05	.05	.2	.2	.2	.2	.2	.2	.2	.2	.2	.2

PHASING PLAN

	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
OPMS — ESTABLISH POLICY												
POSITIONS IDENTIFIED / ANALYSIS — TD MILPERCEN												
DEVELOP POLICY												

RESOURCES	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
STUDENTS NR/MY												
STAFF AND FACULTY—MIL/CIV												
TDA CHANGE—$ MILLIONS												

J11 THE FIRST ASSIGNMENT AFTER OBC WILL BE TO A BRANCH MATERIAL POSITION.

BRANCH TRANSFERS GO TO OAC PRIOR TO BRANCH ASSIGNMENT.

IDENTIFY BRANCH MATERIAL POSITIONS.

ASSIGN LT'S TO BRANCH MATERIAL POSITIONS.

BB-4-2

Author: LTC Pennington
Team Chief: COL Johnson

Annex CC

Development Period: The Captain

1. PURPOSE. To describe the education, training, and assignment experiences required to develop an officer qualified to fulfill the duties of a captain.

2. DISCUSSION.

a. Background.

(1) The development period for captains begins at about the three and one-half year service point when the officer is promoted from the grade of lieutenant and ends when promotion to major occurs. Currently, this period lasts about seven to eight years.

(2) During this period, the captain is offered many different opportunities and varied duty positions. Upon promotion to captain, the level of responsibility and the frame of reference for the officer expand greatly compared to a lieutenant. Initially, the focus for the captain is on branch related assignments. As the officer matures and becomes more experienced, assignments unrelated to branch become more available. Training for these different positions is accomplished by a combination of resident schooling, unit/organization experience and self-development.

b. Type Duties. Captains command companies (or equivalent sized units), perform duties as principals on battalion or equivalent staffs and serve as action officers and supervisors on staffs from brigade through MACOM level. They are assigned to both TOE and TDA organizations, as well as to organizations involving joint and combined responsibilities.

c. Frame of Reference. As a captain, an officer develops an enlarged perspective of the Army and his role in it and continues to commit himself to the service. This frame of reference expansion is summarized in the following discussion of what an officer should BE, KNOW and DO at the end of the Captain Development Period.

(1) BE. Captains internalize professional officer values and lead by their example of behaving consistent with these values. They appreciate their role in the Army and pass on this understanding to their subordinates and students. By the end of the development period, they have honed their judgment through several practical experiences and broadened education.

(2) KNOW. Captains are in-depth experts in their branch skills at company level and perform skillfully as experienced staff officers. They retain the military knowledge and skills they learned as lieutenants and expand them from a branch orientation to a combined arms and services orientation.

(3) DO. Captains are dynamic leaders with a well developed military-oriented thought process. They provide clear guidance to accomplish assigned missions, and take action to implement guidance received. They build aggregates of teams into smoothly functioning units and develop their subordinates in a climate based on trust and mutual respect.

d. Schooling and Related Development Period Experiences.

(1) In the early part of the period as a captain, the officer ideally attends an Officer Advanced Course (OAC) to prepare for a broad range of assignments that he can expect as a captain. It prepares the officer for company command and for branch staff duties at battalion and brigade level, allows him to put past experience in perspective and enables him to learn the latest doctrine. During OAC, officers are also introduced to MQS III which defines the common military skills and tasks in which he needs to be proficient by the end of the professional development period. (See Appendix 1 for a more detailed discussion of OAC.)

(2) After at OAC, an officer is eligible for attendance at the Combined Arms and Services Staff School (CAS3). The CAS3 course provides a

standardized staff training experience within a combined arms and services environment that brings all students up to an equal level in terms of common staff processes. The course also reinforces a common shared operational language and the standardized decision making processes. Initially CAS3 was scheduled for senior captains, but research on when and where captains serve on combined arms and TDA staffs suggests that the course needs to be presented NLT the eighth year of service to get training to most captains before, or while serving on, their first combined arms staff. (See Appendix 2 for a more complete discussion of CAS3.)

(3) The most important objective for a captain is to become branch qualified at the company level prior to being assigned to branch immaterial assignments or beginning functional area training. The requirement for branch qualification is important in that it ensures that officers are well grounded in the basic techniques of their branch that are essential to execute combat missions. Branch qualification normally occurs after attendance at OAC and completion of a successful branch assignment (company command or equivalent). The proponents for each branch must determine the specific branch experience(s) required for branch qualification. (See Appendix 3 for a more complete discussion of branch qualification.)

(4) After company level branch qualification, the officer is available for advanced civil schooling, ROTC/Recruiting Command/Readiness Region assignments, assignments to staff and faculty of a military school and duty on division or higher staff. The captain also selects, and may receive, initial training in a functional area. Due to current shortages of field grade officers, the captain often finds himself serving in a major's position by the end of this development period.

e. Roles and Methods in the Development of the Captain.

(1) Development Roles. Captains focus on cementing branch proficiencies and expanding their capabilities into a combined arms and service context by using appropriate elements of professional and self-development programs. Mentors continue to display the professional values expected of an officer, serve as role models and provide guidance and supervision in ensuring that captains learn the right lessons in sometimes challenging circumstances. Unit and organizational experiences provide the real-world laboratory in which captains apply theory, experiment with innovative solutions to old problems and

develop methods of attacking new and different situations. Service schools provide the environment to broaden their knowledge, introduce new challenges and provide training support materials to individuals, units and organizations.

(2) Methods to Emphasize. Captains learn from their experiences, whether in service schools, on field exercises, or from simulations of challenging circumstances. Small group instruction continues to provide an ideal forum for leadership development, peer interaction and individual assessment. Computer assisted instruction packages and wargame simulations (with or without computers) provide excellent learning methods for individuals and small groups during service school, unit/organizational and individual professional development periods.

f. Aim and Major Thrusts.

(1) Aim. The aim of the development period is to develop through a combination of education, training, self-development and assignments, a captain who is branch qualified, competent to command at company level, prepared to serve on battalion/brigade and higher level staff and prepared for further branch/functional area development.

(2) Thrusts: The following major thrusts assist in accomplishing this aim:

(a) Send 100 percent of the captains, as a goal, to OAC upon selection to captain and prior to company command.

(b) Institute a common core across OAC's and tied to other courses.

(c) Verify MQS III skill qualification.

(d) Have all captains, as a goal, branch qualified at company level prior to branch immaterial assignments.

(e) Emphasize importance of duty as instructor by assignment of a greater number of former battalion/brigade commanders to the schoolhouse.

(f) Have all captains attend CAS3 prior to their eighth year of service.

g. Reference. Refer to Volume I, Annex A for the Development Period: Captain spreadsheets that define officer attributes; list detailed development period policies and specific education and training methods available; assign professional development roles; and describe the current and near term future environment for officers during this development period.

3. RECOMMENDATIONS. The base policies for this period are:

a. A goal for officer education is that the OAC will be a resident experience upon promotion to captain and prior to commanding a company-sized unit. For the RC officer, compeletion of OAC will generally be a combination resident/ non-resident experience prior to the third year after promotion to captain and where possible, prior to or during a company level command experience (see Appendix 1).

b. The current 20 week (plus six weeks) in length OAC will be evaluated in light of the OAC mission and the CAS3 course (see Appendix 1).

c. All OPMD captains will attend CAS3 by their eighth year of service (see Appendix 2).

d. Requirements for company level branch qualification will be defined and branch qualification will normally occur before branch immaterial assignments (see Appendix 3).

e. ODCSPER establish policy to assign former battalion/brigade commanders to school faculties (see Annex I and Appendix 1 to this Annex).

f. Officers are eligible for full-time advanced civil schooling after company level branch qualification (see Annex S).

g. Company level branch qualification will precede functional area development (see Annex Q).

h. Special branch and reserve component officers will attend CAS3 based on quota availability as directed by ODCSOPS (see Annex HH and Appendix 2 to this Annex).

i. Some CAS3 seminar instructors should be former battalion commanders. However, all will have demonstrated proficiency at the brigade and division staff level (see Annex P and Appendix 2 to this Annex).

j. An Army Correspondence Course Program (ACCP) staff development course with no more than two weeks in residence will be designed and implemented for the Reserve Components as an alternative for RC officers who cannot attend either resident CAS3 or when developed the USAR school version of CAS3 (see Annex HH).

4. CSA REMARKS. CSA conceptually approved the base policies for this development period and had the following additional comments:

a. In reference to one of the sub-policies supporting attendance at OAC which stated that officers attend only their own branch OAC, CSA remarked that he wanted more flexibility to send a select few officers to other OACs.

b. In reference to the policy that stated that "some" of the seminar leaders at CAS3 would be former battalion commanders, CSA remarked that he thought "most" of them should be former battalion commanders. On 26 January 1984, the CSA decided that 40-50 percent of CAS3 seminar leaders would be former battalion commanders. The remainder will be promotable majors who have XO/S3 experience with potential for battalion command selection.

Appendices

1 Officer Advanced Course
2 Combined Arms and Services Staff School
3 Branch Qualification
4 Bibliography
5 Action Plan
6 Phasing Plan

Author: LTC Pennington
Team Chief: COL Johnson

Appendix 1 to Annex CC

Officer Advanced Course

1. PURPOSE. To provide supporting policies and rationale for recommendations made in Annex CC.

2. DISCUSSION. The analysis conducted by PDOS study members on the captain's development period led to several major policies. One of the important areas addressed by the study was the Officer Advanced Course and this Appendix discusses the policies affecting the OAC.

a. Requirement for OAC:

(1) As a part of the RETO study, a concentrated effort was directed to develop a reasonable, systematic recommendation for the OAC. In essence, RETO recommended that the OAC be eliminated as a separate school and that the needs of the officer could be met by an expanded OBC, CAS3, on-the-job experience and modular pre-command/functional TDY courses. A need for training was recognized, but the RETO group did not feel that the 26 week OAC was the proper method. TRADOC recommended that an evolutionary approach in changing OAC should take place, rather than the drastic step of termination of the course. This has been done and beginning in January, 1985, a "standard" 20 week resident OAC with add-on modules was initiated. The OAC focus is on preparing the officer for a series of assignments throughout the development period. As necessary, after the completion of the "standard" OAC course, the officer can attend modules, not to exceed six weeks, to focus on preparation for his next assignment.

(2) As discussed in Annex F, Professional Development Concepts, the frame of reference and level of responsibility increase drastically as the officer transitions from one development period to another. At these transition points, each officer needs a time of training, education and reflective thought to synthesize past experiences and expand his perspective. Thus, transition points incorporate a key resident Army school experience targeted on the requirements the officer must meet in the forthcoming period of de-

velopment. The transition to this development period occurs when the officer is promoted from lieutenant to captain and is best accomplished by a resident school experience.

(3) The OPMS study reported two basic recommendations for captains' education/training in relation to the OAC. The first was that MILPERCEN delay attendance to OAC until the fifth or sixth year of service. However, in determining the transition points for the officers development, PDOS concluded that the transition occurs at the point of promotion to captain and consequently, attendance at OAC should occur at that point (currently three and one-half years of service). Second, OPMS recommended that TRADOC tie captain's training to a clear statement of education and training goals which identify institutional, unit and individual training responsibilities. Recommendations of this study support the OPMS recommendation. The important outcome of the OPMS study is that there should be an OAC in the education/training system.

(4) Early attendance at OAC prepares the new captain for a broad scope of assignments he can expect as a captain. It prepares him for company command and low level staff, allows him to put past experience in perspective, enables him to learn the latest doctrine and prepares him for the normal range of jobs available to captains. In supporting the total systems approach to education/training, it complements other PDOS recommendations that provide for attendance at CAS3 prior to the eighth year of service. (See Appendix 2 of this Annex for a complete discussion on CAS3.)

(5) In analyzing the PDOS survey results for those that attended OAC as their most recent resident school, some major findings surfaced—most officers thought that OAC was a helpful experience; most officers said it occured at the right time or late (only nine percent said it was too early); most officers correctly identified

the purpose of OAC as preparation for command or command and staff and only 1.6 percent said to delete OAC from the system. A problem identified by the survey results is related to quality of training and instruction—most (50 to 60 percent) thought that the quality of tactical, technical and leadership training was good or excellent, but a significant number (15 to 20 percent) indicate that the quality was poor or very poor; almost nine percent of the officers responding rated quality of instruction as poor or very poor, 28 percent said instruction was only fair, 53 percent rated it as good and ten percent rated quality of instruction as excellent. When 34 percent of the officers say that quality of instruction was fair or less, it indicates that improvements definitely need to be made. This problem is addressed in paragraph 2c of this Appendix. Overall, according to survey results, the officer corps is very supportive of the OAC but has identified specific areas where improvements are needed.

(6) Based on the premise that key transitions incorporate a resident schooling experience, in light of the significant transition from lieutenant to captain, in keeping with the desires of the officer corps as reflected by the survey and to provide the best possible preparation for service as a captain, the following policy was developed.

A goal for officer education is that the OAC will be a resident experience upon promotion to Captain and prior to commanding a company-sized unit. For the RC officer, completion of OAC will generally be a combination resident/ nonresident experience prior to the third year after promotion to captain and where possible, prior to or during a company-level command experience.

(7) To support this action, ODCSPER is tasked to publish the policy for implementation.

b. Scope of OAC:

(1) Many factors affecting the scope of OAC are occuring at the current time. Primarily, OAC, in its 20 week (plus six weeks) form, is untried. MQS III is not yet on board and its relationship with OAC is not clear. CAS3 has not reached its student load goal and the method of assignment of officers to follow-on modules, CAS3, or to field duty will not be proven until a few iterations of OAC have been conducted. All of these actions need time to mature and consequently, the following policy was developed.

The current 20 week (plus six weeks) in length OAC will be evaluated in light of the OAC mission and the CAS3 course.

(2) This policy is supported by sub-policies that direct specific actions to include reviews of course content and POI's and provides direction as to what should be incorporated into the OAC experience.

(a) To provide a coordinated approach to the OAC, TRADOC review current OAC Common Core and establish OAC length, mission and goals ensuring compatibility with other courses and with common skills, proficiencies and knowledge required of all officers (e.g., critical common MQS tasks, professional values, physical fitness).

(b) To support the individual assessment concept, TRADOC implement MQS III.

(c) To gain maximum benefit from the training provided by OAC, MILPERCEN reinforce, as a goal, the assignment of officers to OAC upon selection for promotion to the grade of captain.

(d) To properly utilize the training provided by OAC, and to aid in branch qualification, ODCSPER establish the policy that assignment priority for graduates of OAC is to organizations with opportunities for company command (or to appropriate utilization assignments for those branches with minimal opportunities for command).

(3) The detailed implementation plan with supporting actions, responsible agencies and required completeion dates for each of these policies is at Appendix 4.

c. OAC Instructors:

(1) As part of the PDOS effort, individual branch schools were asked to report the number of their authorized versus assigned instructors for the OAC and to break the numbers down by grade and by command experience. It is evident that the branch schools do not have the level of experienced instructors that they are authorized. Many major's positions are filled by captains and the number of former battalion/brigade commanders associated with the OAC is low. Lack of experience on the part of the instructor was noted in the survey results since quality of instruction was rated rather low. In addition, interviews of OAC students by PDOS members during visits to the service schools resulted in findings that the students rarely had the opportunity for direct contact with field grade officers. The students at OAC are simply not getting the benefit of the experience that older, proven officers can provide.

(2) Annex I, A Mentorship Strategy, ad-

dresses the need for increased field grade authorizations for the entire system and the following specific policy provides a near term improvement in the experience level of the instructors at branch schools without requiring an increase in field grade authorizations.

ODCSPER establish policy to assign former battalion/brigade commanders to the branch schools.

(3) This policy supports the policies noted in Annex I, A Mentorship Strategy, and will be executed in coordination with that policy.

TRADOC will determine positions where former battalion/brigade commanders can best serve the needs of the school and the student, ODCSPER will determine the number of former commanders that are available for assignment to the branch schools and TRADOC will approve those positions designated for former commanders. In addition, a concerted effort will be made to emphasize to the officer corps the importance of instructing at a service school. The detailed implementation plan with supporting actions, responsible agencies and required completion dates are at Appendix 4.

Author: LTC Kasik
Team Chief: COL Isaac

Appendix 2 to Annex CC

Combined Arms and Services Staff School

1. PURPOSE. The purpose of this appendix is to present the major issues, background, and policies that pertain to the Combined Arms and Services Staff School (CAS3) which is taught at Fort Leavenworth, Kansas.

2. DISCUSSION.

a. Background.

(1) Prior to RETO, staff training resided in the OAC for all captains and CSC level schooling for selected majors (40 to 50 percent). RETO recommended that all majors receive staff training in a combined arms setting since all majors primarily operate in a combined arms or TDA environment and need staff training. Further, fewer selected majors (±20 percent) should go to resident Command and General Staff Officers Course (CGSOC) to meet needs for higher level staff and command. The CSA kept CGSOC as is, and directed CAS3 for captains only. CAS3 originally was scheduled for senior captains, but research on when and where they serve on combined arms staff suggests that the course needs to be presented NLT eighth year of service before or while serving on their first combined arms staff assignment. The CAS3 course provides a standardized staff training experience that brings all students up to an equal level in terms of common staff processes. The course also reinforces a common shared operational language and standardized decision making processess (See Tab A, CAS3 Course Structure and Outline).

(2) Extensive research and officer survey data indicate that Army captains are serving in staff positions above the brigade level much earlier than had been thought. An analysis of authorization documents showed that approximately 70 percent of captain authorizations call for duties requiring some level of staff expertise. The following table is a summarization of authorization requirements for captains serving in staff related positions (See also Tab B, Captain Authorizations).

Battalion Staff	– 22%
Brigade and above	– 8%
TDA Staff	– 41%
Command & other	– 29%
	100%

Table CC-2-1: Captain Staff Authorizations

(3) The situation is expected to remain heavily weighted towards staff duty for captains in light of Force Adjustment Plan (FAP)II criteria. Data extracted from the 8 June 1984 TAADS indicates that a total of 2,919 majors positions have been coded for peacetime fill at the next lower grade. The positions are primarily TDA and involve a significant number of staff billets (Tab C, 8 June 1984 TAADS FAP II data).

(4) PDOS survey data supports the sensing that CAS3 training is occuring late in a captain's exposure to combined arms or installation staff duty. While 48 percent of the captains responding to the PDOS survey indicated that the timing for their CAS3 experience was about right, 39 percent indicated that they received the course too late. These facts, plus survey data which indicates that the median point for service by captains on a staff is eight years supports the need for earlier CAS3 training. The current window is six to nine years of service.

(5) In terms of effectiveness, the CAS3 course as currently taught is one of the most highly rated courses in our Army. Numerous senior officers have visited the school or are aware of the benefits which incure to a unit or organization with the assignment of a CAS3 graduate. A study group observation is that the field perceives CAS3 graduates as well qualified in staff skills and techniques. In addition PDOS survey data indicate that officers themselves rate the experience highly. In terms of individual readiness 92 percent of the responding CAS3 graduates indicate that the course increased their ability to perform their wartime mission. This is the highest rating for any of the Army's major educational experiences. In terms of professional develop-

ment, 78 percent of the graduates rated the course as a significant contributor. This rating was surpassed only by senior service college respondents (See Tab D, Officer Survey Data).

(6) The benefits of CAS3 are costly. The course is resource intense and requires up to 4500 captains to attend annually in order to train all OPMD managed officers as well as select special branch officers and members of the reserve components.

(a) At full implementation Athe course is designed to require 113 former battalion commanders to serve as seminar group leaders. It is doubtful that the Army can meet this requirement in light of available resources and other demands within the system. Some former battalion commanders are required as seminar leaders and the remainder should be officers who have demonstrated a proficiency at brigade and division level staff. The mix of former battalion commanders must be determined and further discussion will be made in the recommendation portion of the annex.

(b) In terms of dollars, the annual cost of CAS3 at full implementation is $8.2 million annually with primary costs being in TDY and travel. Officers will attend CAS3 either TDY enroute to their next assignment or TDY and return from their present assignment. In either case, officers will be lost to their respective units for the nine weeks in which they are in residence at Fort Leavenworth. This loss will be reflected in unit readiness and/or as an increase in the Transient/Holding/Student (THS) Account.

(c) Although both FORSCOM and USAREUR have equated time spent in CAS3 as a potential degradation of unit readiness any actual statistical impact on Unit Readiness Reporting in difficult to quantify. The increased staff productivity of CAS3 graduates will offset any temporary loss in unit readiness caused by time in training.

(d) Increases in the THS account are equally difficult to quantify since the method of attendance determines whether or not the student will be reflected in this account. TDY enroute reflects in the account while TDY and return does not. In either case, the officer will be a temporary loss to the unit, and under full implementation 4500 captains per year equate to 810 man years in the CAS3 classroom.

(e) In addition to the resident CAS3 instruction, the 140 hour nonresident Phase I is designed to bring all attendees up to a common level of understanding in staff techniques and

analytical methodology. Phase I is currently issued to an officer during the later stages of the OAC and must be completed within eighteen months after graduating from OAC. There is significant concern in the field that officers who are in critical branch related jobs (company command, principal battalion staff) may not have sufficient time to devote to the timely completion of Phase I.

(7) Other options have been examined to meet the Army's need to train captains in combined arms and services staff techniques at a lower cost in terms of total resources (some are shown below). None of the other options adequately met the requirements.

(a) The most looked at method by PDOS and the Army Staff is to change the windows of eligibility toward later attendance in an officer's career. The table shows a comparision of various attendance window options and the cost in terms of number of officers to be trained, instructors required, TDY costs, and manyears.

It appears that there are no significant savings until the window moves to the 10 thru 12th YOS. However, at this point the training is no longer a captain's experience; it occurs too late to be of benefit for the vast majority of captains who will be required to serve in a relatively sophisticated staff position.

(b) Another option to reduce the number of captains to receive CAS3 training involves the use of a selection process such as a DA level board action or selection by career managers within MILPERCEN. A selection process was found to be undesirable for several reasons. First, such a process does not meet the real need to provide CAS3 type training to all captains; secondly, a selection process involves a quality cut that should not be made at a point this early in an officer's career (CAS3 becomes a quality determiner rather than a "bring up" course); thirdly, a selection process would unnecessarily add another gate at a time when full potential is yet to be developed and recognized.

(c) A final option was examined in which CAS3 would be moved into the OAC. This was not deemed viable since a major strong point of CAS3 is its "Combined Arms and Services" flavor. This element could not be adequately duplicated in the heavily branch oriented environment of the revised twenty week Officer Advanced Course. CAS3 as it is currently designed and structured could not be integrated into OAC. What could be presented in the OAC would be something less than CAS3 that equated to a gen-

eral overview of staff procedures and techniques but without the combined arms and services emphasis.

b. Findings. The primary aim of combined arms and services staff training should be to provide intense, standardized instruction on staff operations and procedures in a combined arms and services setting to prepare captains for staff duty at brigade and above.

(1) The current CAS3 course and method of instruction is most beneficial to the Army. It provides intense standardized staff instruction which prepares captains for duty at brigade a.id higher levels of staff. The course exposes the officer to a combined arms and services environment which goes beyond the proficiencies learned in their individual branch. The intense learning experience develops an analytical and comprehensive approach to problem solving and staff techniques that carry over into a wide range of situations. CAS3 meets a specific Army need and is highly rated as a success. Continuation of the current program reinforces success rather than diluting or fragmenting the desired output.

(2) Major thrusts should allow 100 percent attendance at CAS3 by OPMD and AGR captains prior to the eigth year of AFCS. Additionally:

(a) All those assigned directly to brigade or higher staff—attend out of OAC. This policy would be supported by minor modifications to the MILPERCEN Revised OAC Implementation Plan shown at Tab E.

(b) All those assigned OCONUS—attend out of OAC.

(c) All attend prior to brigade or higher level staff assignment.

(d) The number of former battalion commanders as instructors should be maximized.

(3) Under these major thrusts it is envisioned that 2400 OPMD officers would attend CAS3 annually as a follow-on experience to the OAC. Some 1500 would return each year to take

CAS3 prior to assuming duties as a brigade or higher level staff officer. CAS3 students attending from the field would be in terms of quotas or goals as depicted in Tab F. The annual training requirement for OPMD managed captains would be about 3900, leaving 600 spaces for special branch and reserve component needs. Total enrollment remains within the stated Army goal of 4500 (See Tab G and Tab H).

(4) In terms of former battalion commanders available for duty as seminar instructors it appears that 40 to 60 percent of requirements could be met with minimal readjustments in Army priorities. The remainder of the CAS3 instructor staff should be proficient in brigade and higher staff work (See Tab I).

(5) In order to allow officers to attend CAS3 after their advance course experience, it will be necessary to restructure Phase I of CAS3 as a follow-on module to OAC. This follow-on module could also be attended by those officers who are enroute to company command or battalion principal staff duty, thus freeing them of the added burden of a Phase I nonresident requirement while in a work intense environment.

3. RECOMMENDATIONS. The following base policies will be implemented to support the issues and recommendations discussed previously.

a. All OPMD captains will attend Combined Arms and Services Staff School (CAS3) by the eighth year of AFCS.

(1) Officers in OAC with follow-on assignment to brigade level or higher staff (or assigned OCONUS from OAC) will attend CAS3 enroute.

(2) Captains will attend CAS3 prior to a brigade or higher level staff assignment.

(3) Continue current ramp up to 2400 CAS3 students in FY86 and full implementation to 4500 students in FY87.

b. Special branch and reserve component officers will attend CAS3 based on quota availability as directed by ODCSOPS.

YOS	#OPMD	#INSTRUCTORS	TDY	MANYEARS
5-8	3900	100	5.2	702
6-9	3600	95	4.0	648
7-9	3400	95	4.6	612
7-10	32C0	88	4 3	576
8-10	3200	88	4.3	576
10-12	2600	65	3.5	468
ANY	4500(w/SP)	115	6.1	810

Table CC-2-2: Later Window

c. Some CAS3 seminar instructors should be former battalion commanders, however, all will have demonstrated proficiency at the brigade and division staff level.

4. CSA REMARKS. CAS3 is the Ranger Course for the staff officer, those students need proximity to former battalion commanders. Therefore, most CAS3 seminar instructors should be former battalion commanders. Note: On 26 January 1984, the CSA decided that 40-50 percent of CAS3 seminar leaders/instructors will be former battalion commanders. The remainder will be promotable majors who have XO/S3 experience with potential for battalion command selection.

Tabs

A–CAS3 Course Structure and Outline
B–CPT Authorizations (OPMD Managed)
C–Extract from TAADS as cı 8/6/84
D–PDOS Survey Data Relating to CAS3
E–MILPERCEN Revised OAC Implementation Plan
F–CAS3 Annual Quota Distribution
G–Officer Advance Course Assignments CY83
H–OPMD Officer Advance Course Fill Requirements
I–Former Battalion Commander Distribution

Tab A to Appendix 2

CAS3 Course Structure and Outline

The Phase I CAS3 modules are contained in the current 140 hour nonresident instruction package and are designed to bring all students up to a common level of understanding prior to attending the resident phase. Implementation of revised attendance policy will require Phase I to be given as a follow-on OAC module for selected officers.

CAS3 PHASE I MODULES

- Communicative arts
- Historical development of staffs
- Staff skills, roles and relationships
- Decision making process
- Quantitative skills
- Personnel and administration operations
- Basic logistic principles
- Training management
- Staff leadership
- Budget
- Reserve components/mobilization
- Tactics overview
- Introduction to threat forces
- Force modernization
- Organization of Army divisions

Phase II (resident) of CAS3 consists of an intense small group learning experience which flows sequentially through a feasible scenario and highlights staff planning requirements during each major event. Students are required to plan, develop, brief and execute staff actions to support scenario requirements as part of a work intense small group action.

PHASE II SCENARIO

INTRODUCTORY — STAFF TECHNIQUES — 8 DAYS

GARRISON — TRAINING — 6 DAYS → BUDGET — 4 DAYS

DEPLOYMENT — MODILIZATION — 4 DAYS → PREPARATION FOR COMBAT — 15 DAYS → DEPLOYMENT — 1 DAY

TACTICAL — FIGHTING THE WAR — 6 DAYS
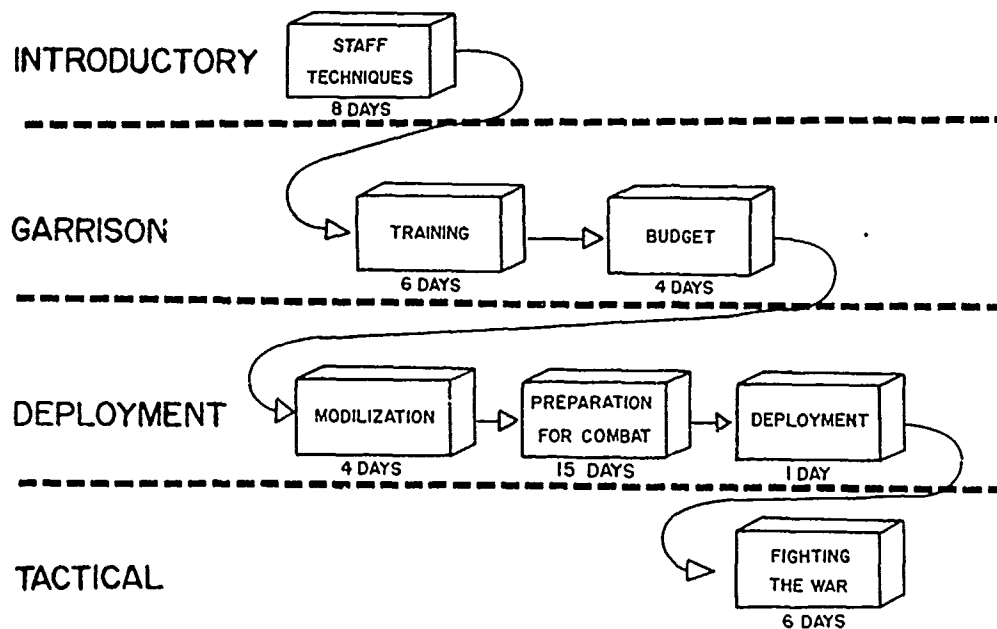
Phase II Scenario

Tab B to Appendix 2

CPT Authorizations
(OPMD Managed)

	COUNT	% OF TOTAL AUTH
Command/Leadership[1] (MTOE & TDA)	4264	21.1%
Bn/Co Staff (MTOE):	4424	21.9%
• Bn only	3605	17.8%
Bde and above staff (MTOE):	1554	7.7%
Staff (TDA)		
• Joint/Combined:	368	1.8%
• HQDA/HQ,FOA's:	133	0.7%
• MACOM HQ:	279	1.4%
• Subactivities/Instal:	7471[2]	37.0%
• Total TDA Staff:	8251	40.8%
Instructors(5K)	1704	8.4%
Total CPT Auth (OPMD)	20,197[3]	100.0%
RECAP:		
• Command/Leadership:	4264	21.1%
• Staff	14229	70.5%
• Instructor	1704	8.4%
	20,197	100.0%

[1] Troop Leadership
[2] Incl School Staffs
[3] Freq Counted During Review

Tab C to Appendix 2

Extract from Taads as of 8 June 1984 OPMD Positions Identified by RMK 99 for Fill at Next Lower Grade in Peacetime

	TDA				MTOE				GRAND TOTAL	TOTAL FIELD GRADE
	06	05	04	03	06	05	04	03		
CMD										
TAG		1	4	1					6	5
INSCOM	1	17	120	15		4	29	17	203	171
CIDC		5	6	1					12	11
ISC	1	8	8	2		1	14		34	32
OCE		3	3						6	6
CSC		8	24						32	32
OCSA	1	67	39						107	107
USAREUR	4	24	35	49	5	60	176	449	802	304
FORSCOM	4	60	225		6	40	176	207	718	511
USMA		13	79	2					94	92
MILPERCEN	3	22	70	10					105	95
MTMC								2	2	
MDW	1	4	6						11	11
MEPCOM		1	7	5					13	8
WESTCOM	1	12	16			2	15	20	66	46
USARJ		1	8	3		3	1		16	13
EUSA	1	3	19	10	1	12	44	26	116	80
USAREC		1	15						16	16
OSA		4							4	4
BMDO		4	2						6	6
FOA's	8	37	56	5					106	101
TRADOC	233	542	1590	475					2840	2365
AMC	16	82	132	38		1		269	231	
TOTALS	274	919	2464	616	12	123	455	721	5584	4247*

* Of which 2919 are Majors.

Tab D to Appendix 2

PDOS Survey Data Relating to CAS3

1. The following chart graphically depicts PDOS survey results which indicates officer sensing as to the timeliness of various schools during a career.

TIMING OF SCHOOLS

(RELATIVE TO WHEN THE COURSE WAS NEEDED, DID YOU ATTEND YOUR MOST RECENT SCHOOL AT THE PROPER TIME?)


```
OBC       12 ......................................... 66
            4

OAC        9 .......... 44
          ..................... 38

CAS3       6 ................. 49
          ............... 36

CGSC (R)  18 ........................... 67
          ........... 25

CGSC (NR) 18 ................. 48
          ............. 35

AWC (R)    5 ................................. 60
          ..... 16

AWC (NR)   4 ................................. 56
          ...... 32                    1 OCT 84
```

```
          0 3 6 9 13 18 23 28 33 38 43 48 53 58 63 68 73 78 83 88 93 98
                              PERCENT
```

| TOO SOON | ABOUT RIGHT | TOO LATE |
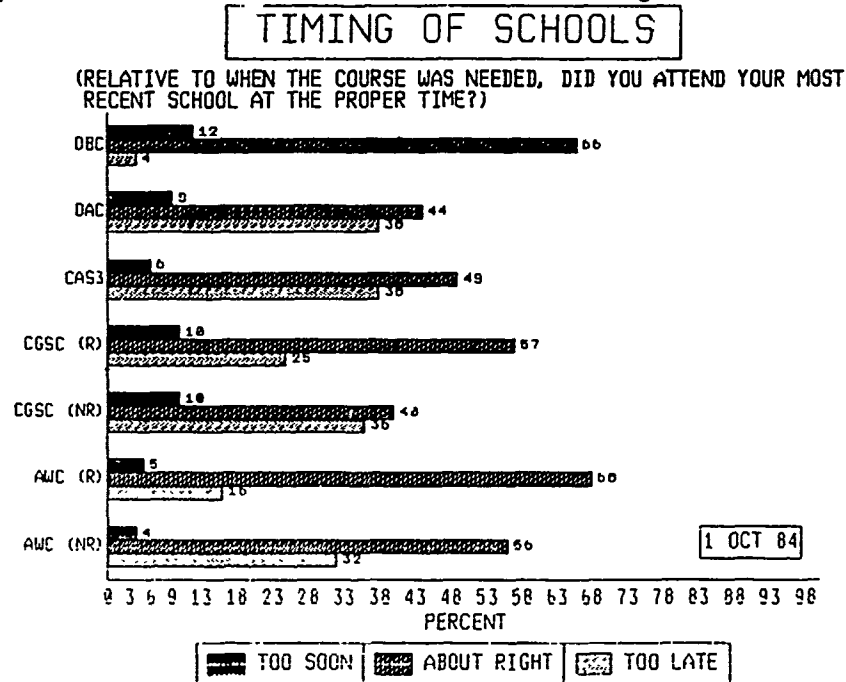
2. The following chart depicts median points for captains in terms of command and staff duties.

CAPTAINS: WHEN DO THEY COMMAND?


```
        600
NUMBER  500
        400
        300
        200
        100
          0
            1   2   3   4   5   6   7   8   9   10  11  12  13
                              AFMS
```

| TOTAL No. CAPTAINS | CAPTAINS AS CDRS | CAPTAINS AS STAFF OFCRS |

| MEDIAN = 8YOS | MEDIAN = 7YOS | MEDIAN = 8YOS |

CC-2-D-1
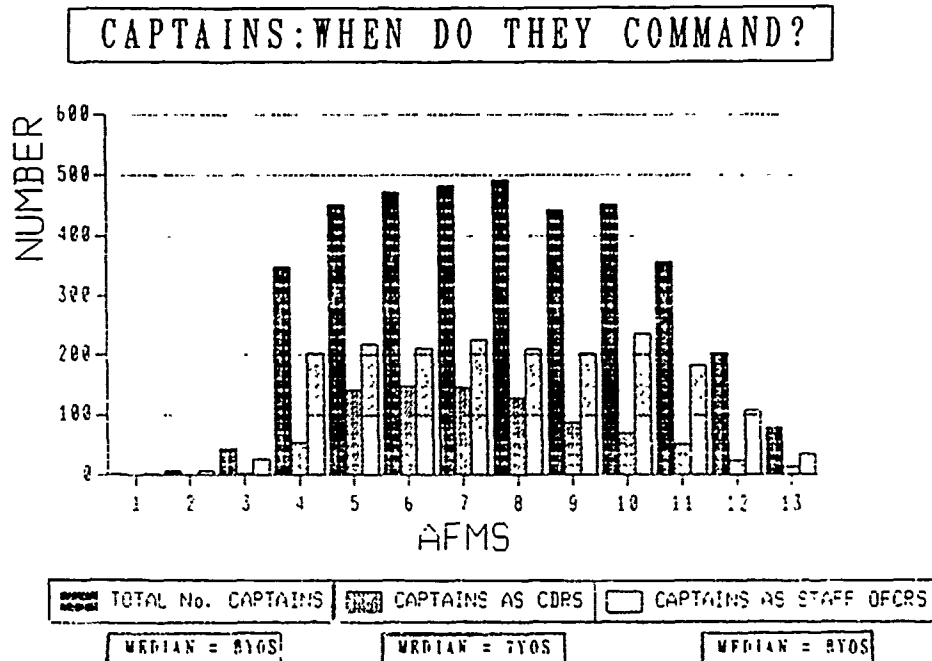
3. The following charts depict PDOS survey results relating to various army schools as a contributor to individual readiness and professional development.

SCHOOL CONTRIBUTION TO DEVELOPMENT

(EXTENT MOST RECENT SCHOOL CONTRIBUTED TO PROFESSIONAL DEVELOPMENT)

School	A GREAT DEAL	SOME	LITTLE OR NONE
OBC	44	39	16
OAC	43	39	18
CAS3	70	19	
CGSC (R)	70	26	
CGSC (NR)	43	36	21
AWC (R)	84	14	
AWC (NR)	82	18	

1 OCT 84

PERCENT INDICATING MOST RECENT SCHOOL CONTRIBUTED

0 10 20 -30 40 50 60 70 80 90 100

■ A GREAT DEAL   ▨ SOME   ⬚ LITTLE OR NONE
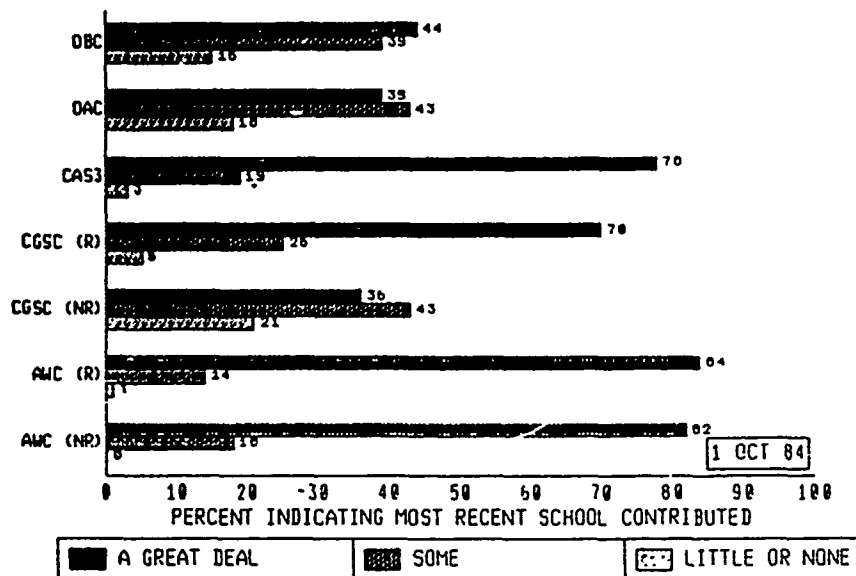
ARMY SCHOOLS ENHANCE READINESS

(% AGREEING THAT THEIR LAST SCHOOL EFFECTIVELY PREPARED THEM TO PERFORM THEIR WARTIME DUTIES)

School	Percent
OBC	66
OAC	78
CAS3	92
CGSC (R)	91
CGSC (NR)	88
AWC (R)	88
AWC (NR)	86

0 3 6 9 13 18 23 28 33 38 43 46 53 58 63 68 73 78 83 88 93 98

PERCENT

1 OCT 84
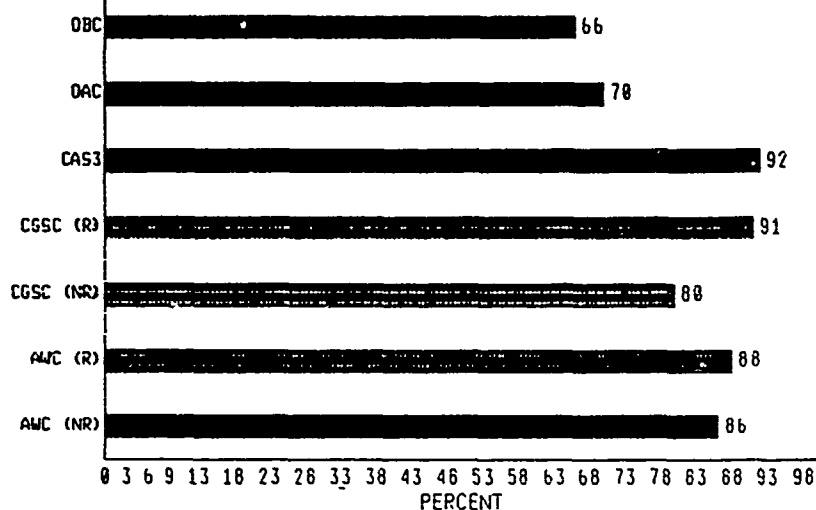
Tab E tc Appendix 2

Milpercen Revised Officer Advance
Course Implementation Plan

1. CAS3 attendance as a follow on event to OAC can be supported within the existing plan. The figure shown describes the system which will support selection and attendance at follow-on modules to the revised twenty week OAC.

2. Duty assignments requiring CAS3 training would be identified by gaining commands. Requirements could then be passed to the individual through the respective school (or MILPERCEN in the case of OCONUS assignments).

3. Officers attending CAS3 would be required to complete a two or three week Phase I module before departing the OAC location to the Ft Leavenworth resident experience.

REVISED OAC IMPLEMENTATION PLAN

(MILPERCEN)

* Identify any Course Requirements by Numbers
** Use of Special Instructions
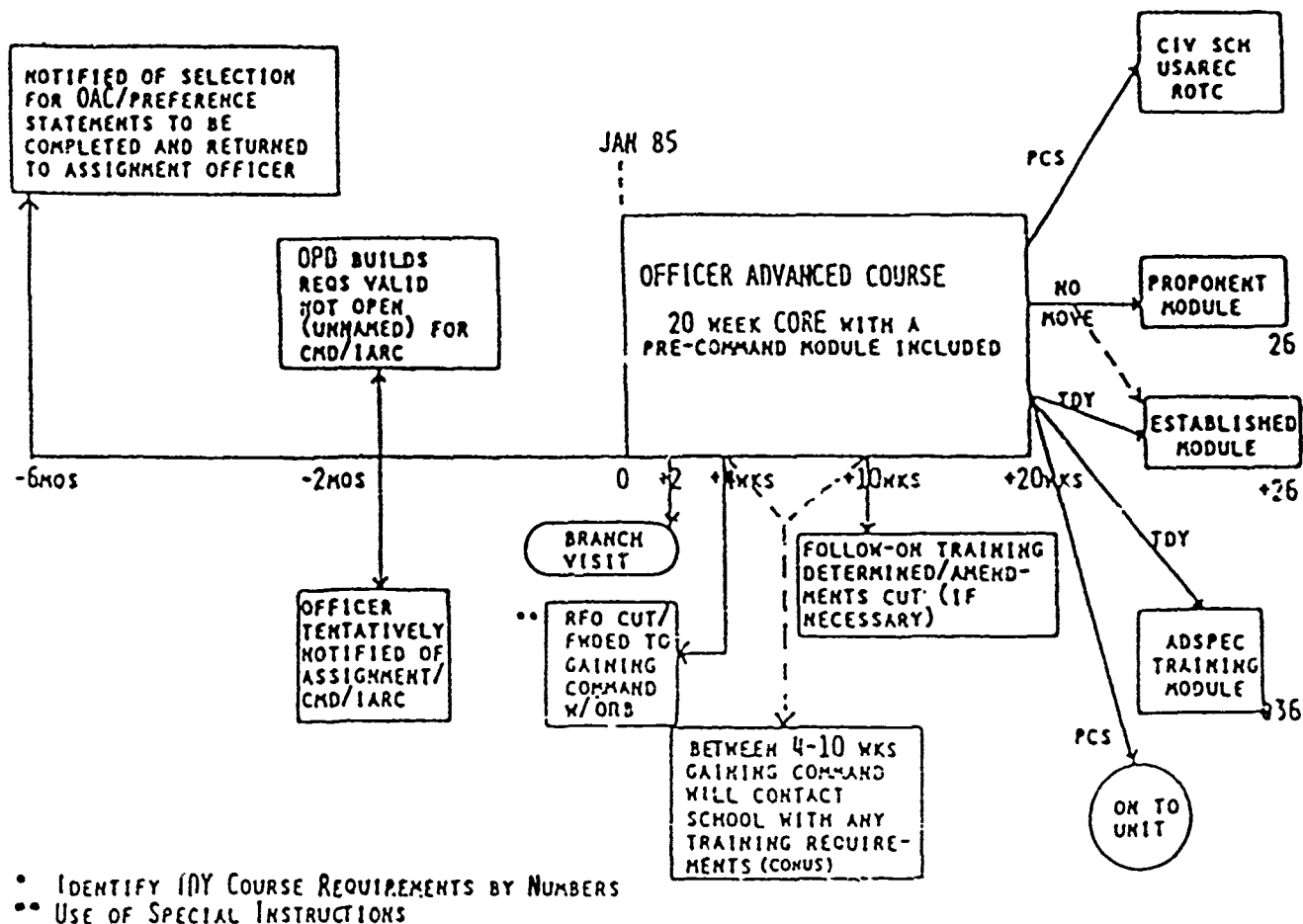
Figure CC-2-E-1, Revised OAC Implementation Plan

Tab F to Appendix 2

CAS3 Annual Quota Distribution

1. The chart below represents possible MACOM quota distributions for TDY and return attendance at CAS3.

2. The figures depicted in the first column are those developed and staffed by ODC-SOPS in FY 84 to support a planned ramp up to 4500 students in FY 86. Subsequent plans changed this ramp to 2400 students in FY 86 and it is expected that the full ramp will be attained in FY 87.

    a. FORSCOM and USAREUR stated concerns with the quotas citing readiness and officer shortages as key factors.

    b. USAREUR stated a desire to have all captains attend CAS3 before arriving in theater.

3. The figures depicted in the second column represent possible quotas for MACOM once attendance policies are changed to allow significant numbers of captains to attend CAS3 enroute from their OAC to a new duty assignment (aprox 2400 annually).

    a. Quotas would allow MACOM flexibility in providing CAS3 training to officers who for various reasons did not attend.

    b. It is anticipated that reserve component and special branch quotas would be adjusted based on experience.

	FY 87	HYPOTHETICAL
USAREUR	690	100
FORSCOM	1100	550
TRADOC	830	440
DARCOM	160	70
INSCOM	80	20
USAREC	70	20
COMMUNICATIONS CMD	60	10
WESTCOM	50	10
CORPS OF ENGINEERS	40	10
USMA	30	5
MEPCOM	10	5
MTMC	10	5
CID CMD	10	5
COMPUTER SYSTEMS COMMAND	10	5
MDW	10	5
JAG	80	40
CHAPLAIN	70	30
AMEDD	500	200
OCAR	60	1
NGB	150	200
OPMD (TDY ENROUTE)	480	240
TOTAL	4500 – 2400	= 2100

Officer Advance Course Assignments CY 83

1. The data below reflects the assignments to major Army commands for OPMD graduates of the CY 1983 Officer Advance Course by Branch of Service.

2. 1129 officers were assigned to Europe or PACOM (OCONUS). This number plus approximately 49% of the remainder (the percent of CPT authorizations for staff at brigade and above level) indicates that 2400 OPMD captains would attend CAS3 enroute to an assignment from the advance course.

OAC CY 83

Specialty Code	11	12	13	14	15	21	25	31	35	42	44	74	91	92	95	
AG										6						6
ARMY RESERVE																
CID/INSCOM				2	2		4	5	41	9	4		6		73	
USACC					6		49	1	2	8						66
COE CCE	1	3	7	1		14										26
CSC							3		2							5
EUROPE	105	121	204	45	34	61	54	29	28	74	14	19	60	43	20	911
FORSCOM	296	103	151	63	86	88	68	38	43	56	20	18	88	67	27	12
NGB																
USMA	4	1	1		1		1	1	1	4	1		1	1		17
MP = MILPERCEN		2										2				4
RECRUITING	3	4	14	3		1	5	2	3	5				3		43
MDW	4	1									4				1	13
PACOM/KOREA	47	4	22	4	35	20	13	9	6	11	13	7	2	13	14	7
TRADOC	197	62	125	99	87	71	51	47	36	56	32	27	37	34	13	974
DARCOM	4	7	10	6	4		9	3	1	6	2	5	15	7	1	801
MSC CMDS	10	2	1		1	1	18	4	16	13	4	1	4	15	7	97
TOTAL	671	310	534	223	256	256	275	138	183	254	88	72	218	190	76	3742 OAG

Tab H to Appendix 2

OPMD Officer Advance Course Fill Requirements

1. The following figures represent actual FY 84 OAC fill data for OPMD managed officers and FY 85-87 fill projections.

2. FY 84 Fill 4198 Actual FY 85 fill will be 4200 to 4250 Aggregate Data points to a fill of 4300 ± 100 over next 4 FY.

3. An aggregate fill of 4300 ± for the next 4 FY indicates no significant problem in training officers in CAS3 enroute to a new assignment from the advanced course.

4. Source of data, MILPERCEN Education Branch, Nov 84.

OPMD OAC Fill/Requirements Projection

Branch	FY 84 Fill	Requirements		
		FY 85	FY 86	FY 87
IN	781	755	800	840
FA	544	500	520	520
AR	421	475	475	475
AD	273	300	300	300
AV	137	500	500	500
MI	251	325	325	325
MP	155	200	200	205
SC	305	280	310	320
EN	269	325	325	325
CM	81	130	140	14
AG	22.	250	250	250
FI	87	90	90	90
OM	196	220	220	220
TC	161	160	160	160
OD – 91	191	150	160	160
73	51	40	40	40
75	66	80	70	70
TOTAL	**4198 ACTUAL**	**4800**	**4885**	**4940**

Tab I to Appendix 2

Former Battalion Commander Distribution

1. Depicted are representative figures as of Dec 84 for availability and assignment of former battalion commanders.

2. ODCSOPS estimates indicate that CAS3 instructor requirements for former battalion commanders could be met at the various levels shown in the following chart by reorienting existing distribution guidance.

CAS3 Level of Fill

MACOM/Activity	100%	50%	30%
CAS3	115	60	35
FORSCOM	37	45	48
DA STAFF	38	46	4
TRADOC (Less CAS3)	42	51	55
USAREC	10	12	13
USAREUR	35	42	45

Delta = Minor adjustment to other MACOMS who are not large users of FBC.

3. 50% CAS3 fill appears most attainable with least impact on other MACOM requirements.

DISTRIBUTION OF FORMER BATTALION COMMANDERS

MACOM/ ACTIVITY	LTC FBC	% of AOA LTC FBC Population	LTC(P) FBC	% of AOA LTC(P)FBC Population	TOTAL	% Total AOA FBC	%FBC VS LTC ODP
SEC ARMY	2	0.6	5	2.0	7	1.2	15.2
AR STAFF	49	14.0	45	18.1	94	15.7	14.8
DEP ACEN	13	3.7	13	5.2	26	4.3	4.5
JOINT ACT	16	4.6	10	4.0	26	4.0	3.8
ALLIED CMD EUR	0	0.0	5	2.0	5	0.8	3.4
FOA's							
USMA	2	0.6	2	0.8	4	0.7	3.8
USAREC	13	3.7	10	4.0	23	3.8	29.1
MEPCOM	0	0.0	0	0.0	0	0.0	0.0
TAC	0	0.0	1	0.4	1	0.2	1.5
BMDO	0	0.0	2	0.8	2	0.4	2.6
OTHER	30	8.5	20	8.1	50	8.3	9.9
USAREUR	45	12.8	19	7.7	64	10.7	6.9
EUSA	10	2.8	3	1.2	13	2.2	9.8
WESTCOM	3	0.9	1	0.4	4	0.7	5.3
USARJ	0	0.0	0	0.0	0	0.0	0.0
FORSCOM	48	13.7	32	12.9	80	13.3	5.4
TRADOC	85	24.2	57	23.0	142	23.7	10.8
USAMC	16	4.6	12	4.8	28	4.7	4.9
INSCOM	1	0.3	1	0.4	2	0.3	1.4
USAISC	10	2.8	4	1.6	14	2.3	7.8
USACE	3	0.9	2	0.8	5	0.8	4.2
MTMC	1	0.3	0	0.0	1	0.2	2.9
MDW	3	0.9	4	1.6	7	1.2	25.0
USACIDC	1	0.3	0	0.0	1	0.2	2.8
ARMY OP ACCT	351	100.0	248	100.0	599	100.0	7.6
STUDENT ACCT	138		89		227		
ARMY TOTALS	489		333		826		

NOTE: MACOM content includes the following:

(1) LTC nonpromotable FBC on orders to command
(2) LTC & LTC(P) FBC assigned not on orders
(3) LTC & LTC(P) FBC assigned and on orders out (if any) but report date greater than 6 months from current date.

Figure CC-2-I-1, Distribution of Former Battalion Commanders

Author: LTC Pennington
Team Chief: COL Johnson

Appendix 3 to Annex CC

Branch Qualification

1. PURPOSE. To provide supporting policies and rationale for recommendations made in Annex CC.

2. DISCUSSION. The analysis conducted by PDOS study members on the captain development period led to several major policies. The requirement for branch qualification is discussed in this Appendix.

a. The most important objective for a captain is to become branch qualified at the company level prior to being assigned to branch immaterial assignments or beginning functional area training. The requirement for branch qualification is important in that it ensures that the Army officers are well grounded in the basic techniques needed in his branch to execute his combat mission. Once the Army knows that an officer can perform his combat mission, the officer can then serve in functional areas or branch immaterial positions.

b. Currently, there is no standard definition for branch qualification. The OPMS Study Group recognized this deficiency and recommended that branch qualification requirements be defined. PDOS supports this finding and has looked at branch qualification as that point in a captain's career when he is considered to be fully qualified to assume any company grade branch position. Branch qualification normally occurs after attendance at OAC and completion of a successful branch assignment (company command or equivalent). The proponents for each branch must determine the specific branch experience(s) required for branch qualification.

c. Establishment of a definition of branch qualification standard is important in that it provides a guideline and an objective for an officer's development and it provides a measure from which an officer's ability can be judged. Thus the following policy is provided.

Requirments for company level branch qualification will be defined and branch qualification will normally occur before branch immaterial assignments.

(1) This broad policy is supported by subpolicies that direct actions to be taken for implementation.

(a) Recognizing that there are different requirements between branches and that there may be different requirements for men or women, branch proponents must establish the initial requirements for branch qualification for men and women officers and provide recommendations to TRADOC for approval.

(b) To support the OPMS recommendations that require branch transfers by some officers, and to ensure that all officers have the proper opportunity for branch qualification, MILPERCEN establish a policy that at approximately three years of service, and prior to attendance at OAC, officers will be offered the opportunity to branch transfer voluntarily to combat support and combat service support branches that have openings.

(c) Proponents will establish education/branch qualification requirements for those that branch transfer at the three and eight years of service points to ensure all officers are properly grounded in their new branch before receiving branch assignments.

(d) To support the concept of branch qualification at the company level, MILPERCEN establish policy that officers will normally be branch qualified prior to branch immaterial assignments and will be branch qualified prior to selection for promotion to major.

(2) Additional specific requirements relating to branch qualification are described in Annex S and Annex Q.

(3) The detailed implementation plan with supporting actions, responsible agencies and required completeion dates for these policies is at Appendix 4.

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Team Chief: COL Johnson

Appendix 4 to Annex CC

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RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED ACTION	NOTES
J20 A goal for officer education is ...blish that, in preparation for company command, the goal is that no one will command prior to attending OAC.		ODCSPER	.35	
J20 A goal for officer education is that the OAC will be a resident experience upon promotion to CPT and prior to commanding a company sized unit. For the RC officer, completion of OAC will generally be a nonresident experience prior to the third year after promotion to CPT and where possible, prior to or during a company level command experience.				
J21 The current 20-week (+6 weeks) OAC will be evaluated in light of the OAC mission and the CAS3 course.	a. Review/define proficienies required upon promotion to major.	a. Proponents	a. 2QFY86	
TRADOC review current OAC Common Core and establish OAC length, mission and goals ensuring compatibility with other courses and with common skills, proficiencies and knowledge required of all officers (e.g., critical MQS tasks, professional values, physical fitness).	b. Determine best method of acquiring these proficiencies (schoolhouse, unit or self-development).	b. Proponents	b. 4QFY86	
	c. Design proper course length to teach those proficienies best acquired in the institution (TDY or PCS).	c. Proponents	c. 1QFY87	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	--Consider effect on officers and families, base operations and relationships between OBC and OAC policies in course length analysis.			
	d. Consider, in course design, the staff skills taught at CAS^3 and determine level of staff skill proficiency required for OAC graduates.	d. Proponents	d. 2QFY86	
	e. Develop and implement a Common Core in all branch school POI's that is compatible with the common skills, proficiences and knowledge required of all officers.	e. TRADOC	e. 1QFY87	
	f. Designate an agency responsible for coordination of the OBC/OAC Common Core of instruction through-out the TRADOC system.	f. TRADOC	f. 3QFY86	
	g. Review and ensure compatibility of OAC Common Core with OBC, CAS^3 and ANCOC.	g. TRADOC	g. 1QFY87	
	h. Evaluate utilization of Phase 1 preparation for CAS^3 as a module for OAC.	h. Proponents	h. 4QFY86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	i. Ensure Common Core skills are presented uniformly throughout TRADOC.	i. TRADOC	i. 1QFY87	
	j. Establish OAC length, mission and goals based on review.	j. TRADOC	j. 2QFY87	
	k. Implement revisions to OAC.	k. TRADOC	k. 4QFY87	
TRADOC implement MQS III.	a. Obtain CSA formal approval of MQS III concept.	a. TRADOC	a. 3QFY87	
	b. Review, standardize and validate the critical tasks in MQS III.	b. TRADOC	b. 3QFY87	
	-Designate no more that 25 tasks from the common task manual as critical.	TRADOC and Proponents	3QFY87	
	-Designate no more than 50 tasks from the branch task manual as critical.	Proponents and TRADOC	3QFY87	
	c. Establish standard certification procedures for all proponents.	c. TRADOC	c. 3QFY87	
	-Publish common critical task certification procedures.	TRADOC	4QFY87	
	-Designate branch specific critical task certification procedures.	TRADOC and Proponents	4QFY87	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)--PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	d. Develop and institute instruction on MQS III certification.	d. TRADOC	d. 1QFY88	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
Reinforce as a goal the assignment of officers to OAC upon selection for promotion to the grade of CPT.	a. Establish policy that attendance at OAC will be as soon as possible after selection for promotion to CPT.	a. MILPERCEN	a. 1QFY86	
	b. Publish policy.	b. MILPERCEN	b. 1QFY86	
	c. Advertise policy.	c. MILPERCEN	c. 1QFY86	
	d. Implement policy.	d. MILPERCEN	d. 3QFY86	
Concurrently with full implementation of CAS3, establish policy that attendance : OAC will be only to officer's basic branch school with possible exceptions for select Armor and Infantry officers.	a. Establish policy.	a. MILPERCEN	a. 3QFY86	
	b. Publish policy.	b. MILPERCEN	b. 1QFY87	
ODCSPER establish policy that assignment priority for graduates of OAC is to organizations with opportunities for company command (or to appropriate utilization assignments for those branches with minimal opportunities for command).	a. Identify those positions that provide adequate opportunity for company command (or comparable assignment).	a. Proponents	a. 2QFY86	
	b. Provide recommendations to TRADOC.	b. Proponents	b. 2QFY86	
	c. Provide approved positions to ODCSPER.	c. TRADOC	c. 3QFY86	
	d. Establish policy to assign OAC.	d. MILPERCEN	d. 4QFY86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J22 Requirements for company level branch qualification will be defined and branch qualification will normally occur before branch immaterial assignments.				
Establish initial requirements for branch qualification for men and women officers and provide recommendations to TRADOC.	a. Establish minimal requirements for branch qualification which include attendance at OAC and one appropriate field assignment at the CPT level.	a. Proponents	a. 2QFY86	
	b. Identify appropriate field assignments that support branch qualification for each branch.	b. Proponents	b. 2QFY86	
	c. Identify requirements for branch qualification that cannot be met by women officers due to current exclusion policies.	c. Proponents	c. 2QFY86	
Establish policy that at approximately 3YOS and prior to attendance at OAC, officers will be offered the opportunity to branch transfer voluntarily to combat support and combat service support branches that have openings.	a. Establish policy.	a. MILPERCEN	a. 4QFY86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
Establish education/branch qualification requirements for those that branch transfer at the three and eight YOS points.	a. Ensure that officers branch transferred at the 3d and 8th YOS are given a course of instruction prior to assignment in their new branch.	a. Proponents	a. 1QFY88	
Review and approve branch qualification requirements.		TRADOC	1QFY87	
Establish policy that officers will normally be branch qualified prior to branch immaterial assignments and will be branch qualified prior to selection for promotion to major.		MILPERCEN	1QFY88	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
123 ODCSPER establish policy to assign former battalion/brigade commanders to branch schools.	a. Determine positions, in priority, where assignment of a former battalion or brigade commander is desired.	a. Proponents	a. 4QFY86	
	b. Determine maximum number of former commanders that can be assigned to branch schools.	b. ODCSPER	b. 4QFY86	
	c. Approve positions where former commanders are desired.	c. TRADOC	c. 1QFY87	
	d. Establish policy to assign former commanders to identified positions in branch schools.	d. ODCSPER	d. 2QFY87	
	e. Implement policy to assign former commanders to identified positions in branch schools.	e. MILPERCEN	e. 4QFY87	
	f. Publish through all media resources that service at branch schools is a highly desireable assignment.	f. ODCSPER	f. 2QFY87	
	g. Ensure selection boards are aware of importance of instructor assignments.	g. ODCSPER	g. 4QFY86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
Implement revised attendance criteria for CAS³.	a. Continue present ramp-up plans to train 4500 in FY 87.	ODCSOPS (P), ODCSPER, TRADOC	1st Qtr FY87	1, 2
I01 All OPMD/AGR CPT will attend CAS3 by end of 8 YOS.	b. Revise CAS3 Phase I for officer attending immediately after OAC.	TRADOC (P), ODCSOPS	4th Qtr FY86	
I14 - Special branch officers will attend CAS3 based on quota availability.	- Remove duplication from Phase I that are taught in OAC core.			
	- Integrate MQS decisions in revised Phase I.			
- CPT in OAC with follow-on assign. to Bde or higher staff (or assigned OCONUS) will attend CAS3 enroute.	c. Modify and refine instructor resource plan.	ODCSPER (P), MILPERCEN, TRADOC	2D Qtr FY 86	
	- Develop selection criteria.			
	- Establish Cdr/Staff ratio.			
- CPT not attending enroute from OAC will attend CAS3 prior to a Bde or higher level staff assignment.	d. Revise target year group for 100% completion of CAS3.	ODCSPER (P), ODCSOPS, MILPERCEN	4th Qtr FY87	3
I15 - Some CAS3 seminar instructors should be former Bn Cdr's. However, all will have demonstrated proficiency at the Bde and Div level staff.	e. Modify revised OAC implementation plan to allow sequential attendance at CAS3 residence phase after OAC.	ODCSOPS(P), TRADOC, ODCSPER	2d Qtr FY 88	

NOTES:
1) Continue to publicize CAS³ program changes with emphasis on rationale and importance of early attendance. 2) Current ramp-up plans are in Army program. 3) Integrate modular follow-on to OAC core to support next most likely assignment. 4) Expand on existing assignment plans which support modular selections at OAC.

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	f. Modify supporting personnel plan to Revised Officer Advance Course implementation plan. Assignment procedures to allow follow-on CAS3 from OAC for selected officers. Integrate COHORT Policies.	ODCSPER (P), MILPERCEN	2d Qtr FY88	3, 4
	g. Determine impact on family. (housing, stability, etc.).	ODCSPER(P), TRADOC	3rd Qtr FY 87	5
	h. Revise MACOM, Special, Branch and RC quotas based on new attendance criteria.	ODCSOPS(P), ODCSPER TJAG, OCCH, OTSG NGB, OCAR	2d Qtr FY88	
	i. Revise Army circular to reflect new attendance policies.	ODCSOPS (P), TRADOC	4th Qtr FY88	
	j. Begin implementation of revised attendance policy for CPT's to CAS3.	ODCSOPS(P), TRADOC ODCSPER, MILPERCEN TJAG, OCCH, OTSG, NGB, OCAR	2d Qtr FY89	

NOTES:
5) OPMD quotas/goals to MACOMS will facilitate CAS3 training for remainder of year group who did not attend enroute from OAC.
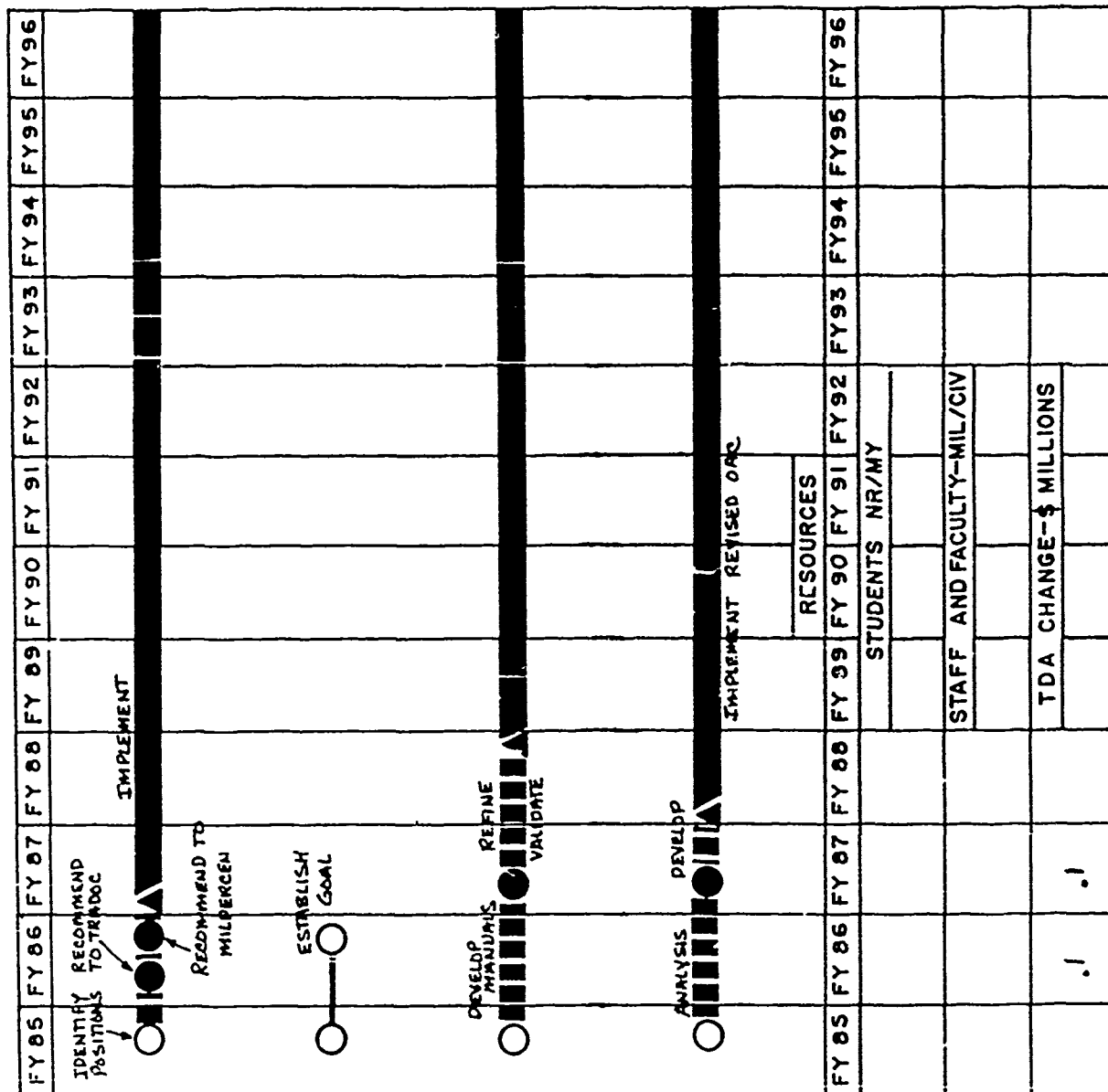
DEVELOPMENT PERIOD--THE CAPTAIN

J20 OAC WILL BE A RESIDENT EXPERIENCE UPON
PROMOTION TO CPT.

ASSIGNMENT PRIORITY TO ORGANIZATIONS WITH
OPPORTUNITY TO COMMAND.

ASSIGN TO OAC UPON SELECTION FOR PROMOTION
TO CPT.

IMPLEMENT MOS III

REVIEW AND REVISE OAC.

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
IDENTIFY RECOMMEND POSITIONS TO TRADOC		IMPLEMENT										
RECOMMEND TO MILPERCEN												
ESTABLISH GOAL												
DEVELOP MANUALS REFINE VALIDATE												
ANALYSIS DEVELOP				IMPLEMENT REVISED OAC							

RESOURCES

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY												
STAFF AND FACULTY-MIL/CIV												
TDA CHANGE-$ MILLIONS	.1		.1									

PHASING PLAN

	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
J22 DEFINE COMPANY LEVEL QUALIFICATION REQUIREMENTS. QUALIFICATION OCCURS PRIOR TO IMMATERIAL ASSIGNMENTS.												
BRANCH QUALIFICATION PRIOR TO BRANCH IMMATERIAL ASSIGNMENTS.												

ANALYSIS — APPROVE REQUIREMENT — ESTIMATE REQUIREMENT — TRAINING PROGRAM FOR BRANCH TRANSFERS

RESOURCES	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
STUDENTS NR/MY												
STAFF AND FACULTY—MIL/CIV												
TDA CHANGE—$ MILLIONS	.05	.05										

PHASING PLAN

J23 ESTABLISH POLICY TO ASSIGN FORMER BATTALION/BRIGADE COMMANDERS TO BRANCH SCHOOLS.

FORMER COMMANDERS ASSIGNED TO BRANCH SCHOOLS.

DETERMINE POSITIONS

APPROVAL

ESTABLISH POLICY

IMPLEMENT

RESOURCES	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY												
STAFF AND FACULTY–MIL/CIV												
TDA CHANGE–$ MILLIONS		.05										

PHASING PLAN

CdMBINED ARMS & SERVICES STAFF TRAINING

o CONTINUE RAMP TO 4500 (6-9 YEARS).
  2400 IN FY86
  4500 IN FY87

o IMPLEMENT REVISED ATTENDANCE CRITERIA

  oo ALL OPMD/AGR CPT'S BY 8 YEARS OF SERVICE.

  oo FOLLOW ON TO OAC FOR CPT'S ASSIGNED TO ≥ BDE STAFF OR OCONUS.

  oo ALL OTHERS ATTEND BEFORE ASSIGNED TO ≥ BDE STAFF.

PROGRAM

	FY 85	FY 86
	1200 612	4500 810
	30	113
	21	8.2

Phasing chart (FY85–FY96):

	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
	1700	2400	4500	4500→								

CONTINUE PRESENT RAMP

INSTRUCTORS

MODIFY TOTAL YEAR GROUP FOR 100% ATTENDANCE AT CAS3

MODIFY EXISTING PHASE I

DEVELOP OAC ADD ON MODULE IMPLEMENT

REUSE MACOM QUOTA SYSTEM

IMPLEMENT

PLAN PREPARE FINALIZE IMPLEMENT

RESOURCES

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY	-2100 / -378											
STAFF AND FACULTY—MIL/CIV	-53											
TDA CHANGE—$ MILLIONS	-3											

PHASING PLAN

COMBINED ARMS AND SERVICES STAFF TRAINING ATTENDANCE
I01

Chart columns (left to right): FY 85, FY 86, FY 87, FY 88, FY 89, FY 90, FY 91, FY 92, FY 93, FY 94, FY 95, FY 96

CAS3 ATTENDANCE BY YEAR GROUP

TRANSITION YEAR GROUPS

Year group bars: 79, 80, 81, 82, 83, 84, 85, 86, 87, 88

NUMBER REQUIRED TO BE TRAINED EACH YEAR—OPMD

Circled values: 3600, 3600, 3600, 3600, 3600, 4575, 4650, 4725, 4800, 3960, 3960

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
RESOURCES												
STUDENTS NR/MY												
STAFF AND FACULTY—MIL/CIV												
TDA CHANGE—$ MILLIONS												

Author: LTC Seelig
Team Chief: COL Isaac

Annex DD

Development Period: Major/Lieutenant Colonel

1. PURPOSE. To describe the requirements and educational experiences for the major and lieutenant colonel.

2. DISCUSSION.

a. Background.

(1) The development period for major/lieutenant colonel begins at a key transition point . . . the move from company to field grade perspective and significantly increased responsibilities. This transition has been recognized since the 18th century when the British indicated:

". . . a field grade officer was an officer of sufficient seniority and experience to command a regiment in the field."

(2) The officer after having been selected for promotion to major is enroute to becoming a "full partner" in the firm regardless of whether he is promoted to lieutenant colonel. He will receive tenure to the 20 year mark according to the selective continuation policy. The House of Representatives Report 96-1462 on the Defense Officer Personnel Management Act expressed the desires of the Committee on Armed Services:

"It is the committee's strong desire that these officers be continued to 20 years of service as a matter of course; only in unusual circumstances would this authority not be fully utilized."

b. What the field grade officer must "BE-KNOW-DO".

(1) Field grade skills need to deal with a broader, more integrative world, far beyond the basic staff skills. Here there is a requirement for officers to understand the nuances of very complex systems, the interplay of competing demands for scarce resources, and be able to apply a reasoned and seasoned analytical eye to the issues at hand. In this period, the officer becomes a middle level leader, responsible in some assignments for the development and recommendation of key policies and implementaion of same. Further, he is the key workhorse in the actual application of all major building block systems.

(2) The field grade officer needs to be able to deal with the complexity of developing, planning, operating, and sustaining the major elements of our structure. This requires additional training in the theory and practice of decision-making, application of systems, staff techniques, and the actual exercise and feedback experienced in an academic setting.

(3) Finally, the most influential persons in our Army regarding inculcation and daily manifestation of values and standards are majors and lieutenant colonels. They are the seasoned leaders closest to the troops and in many cases close to potential breaches of ethics and values. Majors and lieutenant colonels take the tone set by seniors, and within their own value and ethical development, impart it to the Army at large, identify and fix shortfalls and play the leading role in the moral and ethical strength of our organization. Education at this level must include significant reinforcement of our basic values and ethical constructs. Further, we must increase the officer's confidence and commitment to take on moral and ethical issues when they appear

c. The environment of the field grade officer.

(1) Historically 80 percent of eligible captains in the Army are selected for major through a central selection process. At this same time, under the provisions of DOPMA and AR 601-100, Other Than Regular Army (OTRA) officers who are promoted to major are automatically integrated into the Regular Army (RA) if they are otherwise qualified. Selection to major and conversion to RA provides the officer an opportunity for selective continuation if he is twice non-selected for promotion to lieutenant colonel.

(2) During this phase in an officer's career, he will be developed in different career patterns through single, dual, and sequential tracking. It is expected that 20 percent of the field

grade officers will singl_ track in their branch. Officers in branches with large field grade requirements will single track in their branch. Functional area designation and development will continue to occur during this period. Functional area (non-acession) requirements (those not related to a branch) increase by ten-fold from lieutenant to captain and continue at approximately the same level in the field grade. This requires some field grade officers to obtain additional specialities and receive concomitant specific course entry training (For further discussion see Appendix 3).

(3) The primary educational experience encountered by the officer during this development period is the Command and Staff College (CSC). Currently 40 to 50 percent of a year group is selected for resident attendance. After attendance, DA guidelines distribute 85 percent of the officers attending CGSC and the Air, Naval, and Marine Staff Colleges under a Military Education Level 4 (MEL 4) distribution plan. The goal of the MEL 4 distribution plan is to assure that each MACOM and activity receive a specified minimum allocation of officers possessing a MEL 4 commensurate with established HQDA priorities.

(4) The type of an assignment for a field grade officer will most probably be in a TDA organization. Currently 80 percent of all field grade authorizations are in TDA organizations and about ten percent of all field grade assignments could be considered as branch immaterial. Command opportunity is about 25 percent for lieutenant colonel. The historical data indicates that 50 to 60 percent of lieutenant colonel level command selectees were chosen the first-time eligible, while an additional 30 to 40 percent were picked as second-time eligibles, with 25 to 41 percent having at least one below the zone promotion. However, as a result of a recent Chief of Staff, Army decision no more than ten percent of those selected for command will be picked from the first-time eligibles. All officers who are selected for command will receive a refresher pre-command course.

(5) Exiting from this development period will either be through promotion to the grade of colonel or retirement. Currently about 50 percent of lieutenant colonels are selected for colonel. If not selected for promotion, the current law requires the mandatory retirement of lieutenant colonels at 28 years of service.

d. Roles in the development of the field grade officer.

(1) The role of the individual officer is to focus on gaining indepth education in an appropriate "track" career pattern using: military reading program, computer assisted instruction (CAI) packages, "school of the air" teleconferences and wargames to augment field training opportunities. The officer will continue use of assessment technology to monitor his own strengths and weaknesses, then progress with the help of a mentor. The officer will evolve insights from education and developmental opportunities in unit/organizational assignments and seek to become a mentor for junior officers in unit and schoolhouse settings.

(2) The role of both the school and unit mentor is to explain/reinforce division and installation level frames of reference. They will assure majors and lieutenant colonels have demonstrated expertise in integration of weapons systems and support functions necessary to obtain and sustain these systems with extensive use of computer simulations, field training and visits to NTC to support this task. All mentors will serve as mentor instructors in support of "school of the air" video-audio teleconferencing and when developed, complete validation of MQS IV (major) and MQS V (lieutenant colonel) tasks.

(3) The unit/organization of assignment will provide experiential developmental opportunities to relate school theories to the real world including multiple electronic training and decision making support aids in officer development programs. The unit/organization will also monitor major and lieutenant colonel validation of MQS IV and V tasks when developed.

(4) The schools role remains oriented on teaching, providing training support materials for the field and keeping the knowledge base current for multiple users and functions. Schools will focus on the need for more complex integration and synthesis skills. The schools will introduce students to an array of electronic methods aimed at decreasing time required to master and retain skills while enhancing sound decision making under stress. This will permit use of these methods to support both education and training development needs and operational missions. When developed, the schools will evaluate a certain percentage of MQS IV (major) and MQS V (lieutenant colonel) tasks. In addition, the use of artificial intelligence expert systems, for educational purposes, will be added to curriculum when developed.

e. Methods to emphasize.

(1) The individual officer should take advantage of field trips, case studies, and professional reading to increase his knowledge. The application of this knowledge and further development can occur through CAI packages, computer teleconferencing and computer simulations (wargames).

(2) The mentor should maximize the use of field trips, case studies and field practical exercises to apply real world applications to the theory. Professional reading and instruction in a small group mode to facilitate the professional development of officers will also be useful in providing the teaching and coaching officers require.

(3) The unit/organization must take advantage of real world field training or experiential application of the theory using real world applications. Useful techniques would be CAI packages, computer teleconferencing and computer simulations (wargames).

(4) The schools should include field trips (NTC), case studies, field practical exercises and small group instruction applying real world considerations. Instruction should include CAI packages, computer teleconferencing and computer simulations. As the technology develops, learning and decision making can also be enhanced using artificial intelligence—expert systems.

3. Recommendations.

a. The aim of the field grade development period is to:

(1) Develop a field grade officer who possesses the body of knowledge and conceptual skills necessary to perform successfully in field grade command positions and in staff positions at all levels of the Army.

(2) Provide a small number of officers a broad and deep education in the art and science of war at the tactical and operational levels.

b. The major thrusts of this period are to:

(1) Provide command and staff level education for all majors.

(2) Provide multiple routes to command and staff level schooling with MEL 4 a prerequisite for active component promotion to lieutenant colonel.

(3) Have a MEL 4 land warfare and support core for alternative command and staff level opportunities.

(4) Continue the School for Advanced Military Studies (SAMS).

(5) Have the pre-command course provide a review/update for officers assuming command.

c. The base policies are:

(1) All active component officers will complete a resident or non-resident command and staff level course prior to selection to lieutenant colonel. This course will include a command and staff level land warfighting and support doctrine core (See Appendix 1 for further discussion).

(2) A small number of MEL 4 graduates will be provided opportunities for an Advanced Military Studies Program (AMSP) emphasizing the integration of the art and science of war at the operational level, in joint and combined operations, and across the spectrum of conflict (See Appendix 2 for further discussion).

(a) Maintain enrollment at 48 students. Evaluate student/cost/ benefit tradeoffs. Then make decision of future course enrollment.

(b) Publish a DA circular which formalizes the selection process.

(c) Commander TRADOC determine correct branch/skill mix for course attendees.

(3) Publish an Army regulation which will define pre-command course policies, purposes and responsibilities (See Annex R for further discussion).

4. CSA Remarks.

a. The base policies were conceptually approved by the Chief of Staff, Army.

b. The policy statement proposing promotion boards selecting majors will also select officers for resident command and staff level schooling was disapproved. The Chief of Staff, Army wanted to retain two separate boards—one for selection for promotion to major and one for selection to resident CSC. Further, he wants to retain multiple looks for resident selection.

c. The Chief of Staff, Army reaffirmed the Armed Forces Staff College as a MEL 4 producing institution provided the warfighting and support doctrine core was obtained by the students.

d. The Chief of Staff, Army completely agreed with the notion of a common warfighting and support doctrine core for all field grade officers and the requirement to obtain a MEL 4 prior to selection to lieutenant colonel.

e. During the discussion of MEL 4, the Surgeon General asked if it applies to special branches. In response, the Director PDOS answered that the special branches would require completion of common core prior to selection to lieutenant colonel. The Surgeon General concurred. The Chief of Chaplains and the Judge Advocate General made no comments. The CSA made no comment.

Appendices

1 Command and General Staff Level Education
2 Advanced Military Studies Program
3 Branch Qualification: Field Grade
4 Glossary
5 Bibliography
6 Action Plan
7 Phasing Plan

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Team Chief: COL Isaac

Appendix 1 To Annex DD

Command and General Staff Level Education

1. PURPOSE. To describe the requirements and proposed system for field grade officers to obtain command and staff level education.

2. DISCUSSION.

a. Background.

(1) Given the presence of OAC (company command/branch staff) and CAS3 (initial combined arms and services exposure, full development of basic staff operations and procedures), Command and Staff College (CSC) can be viewed as advanced command and staff education and training. It should be a mixture of education (developing cognitive/analytical skills, ability to think, assess, recommend, decide, and act); and training in tools, techniques and procedures to apply increasingly complex Army and external systems toward the accomplishment of the mission. This includes a substantially increased level of knowledge of all functions of the Army system to structure, man, equip, train, mobilize, deploy, command/control and communicate, manage, sustain, and manage information for the Army in the field in war and peace—across the whole spectrum of conflict. Of particular importance are the needs to integrate all elements and joint services in the current land warfare and support doctrine and to begin developing an appreciation for the operational level of war. Gaining and maintaining a historical perspective and appreciation for the art and science of war is also essential to this level of professional growth. Further, all of this should occur in the context of an understanding of the national and international environment in which the force may be applied as a part of the national security process.

(2) The field grade officer is expected to be broadly based with a versatile understanding of the whole Army system and its application and have the ability to assimilate widely disparate issues. The frame of reference is broadened from one which required him to perform a series of direct operating tasks to one which requires him to manage a functional system composed of many varied tasks/methods. The key factor in determining whether the US Army will win or lose the next war we fight is an effective officer educational system to provide the body of knowledge to the field grade officer. Without an effective system, technological breakthrough will count for naught because we will not know how to direct it. Without an effective officer education system, we cannot develop a reasonably coherent doctrine and even if we did we would not be able to assimilate it.

(3) Currently, about 40-50 percent, depending on the year group, of the active component major's population is selected for resident attendance at CSC. An additional 25-35 percent consider it important enough to expand their capabilities to take the course by non-resident instruction on their own. The wide range of assignments and responsibilities covered by this group supports the broad interest in and requirement for this level of education for all members of the career force. Further, this may be the last significant general education opportunity for the vast majority of this group since historically only about 50 percent are selected for promotion to the grade of colonel thereby requiring further schooling. Therefore, a requirement exists for all career professional officers to have the broad perspective and "full partnership" knowledge and attributes developed at the CSC level. Hence we should require all majors to complete the CGSOC or similiar course.

(4) For the Reserve Component (RC) field grade officer there is limited time available to operate in his civilian occupation, perform in a military status and to continually train for battle. Therefore, the minimum required field grade education must be adjusted based on minimum proficiencies required for their "go to war assignment." Since most reserve component majors and lieutenant colonels serve in staff positions at battalion and brigade level and can perform

those duties with the education received in the officer advance course, plus staff officer development training, their education requirements should be limited to OAC and the Staff Development Course. If time and space permit, Reserve Component field grade officers are encouraged to pursue command and staff college. Duties of RC colonels require command and staff type knowledge and perspective, therefore, CSC level education will continue to be considered the minimum education requirement for promotion to colonel for RC officers.

b. Field grade minimum education requirements.

(1) There should be a "core" set of proficiencies/knowledge we expect from an emerging field grade officer regardless of assigned branch and/or functional area. This is necessary to increase his mastery of the art and science of war as the foundation for applying his branch and/or functional area expertise. This includes the field grade perspective of integration of the combined arms and services on the battlefield, up through the operational level of war. In addition, knowledge of the systems, functions, and actions necessary to develop and run the Army in peace and war across the spectrum of conflict need be included. All of this must be bounded and supported by increased value and ethical bases. The "core" skills must include as a minimum:

(a) Appropriate theoretical knowledge and a set of practical skills/proficiencies oriented on "How the Army Fights" and "How the Army Runs."

(b) Knowledge of the human dimension of combat.

(c) A historical perspective of war.

(d) The ability to envision future wars.

(2) All the foregoing yields the first policy:

"All active component officers will complete a resident or non-resident command and staff level course prior to selection to LTC. This school will include a command and staff level warfighting and support doctrine core."

(3) This core body of knowledge required of all majors is not universally available at all schools leading to a CSC level education. To the extent that the common core is not achieved in a given CSC level school, that school program should require the mandatory attendance of all Army officers in "elective" programs which fullfill the core requirements. As an alternative,

Army officers may need to take non-resident instruction to provide the current land warfare and support doctrine. The "core" requirements must be developed in detail to include a mecnanism to measure other schools' ability to meet the core. This review should be conducted through the Intermediate Military Education Coordination Conference (IMECC). We should give constructive credit where due, yet reserve the perogative to further educate/train Army students as necessary to reach the core level. The Combined Arms Center should be given the task to identify short falls and develop the courses to supplement, if necessary, the other CSC institutions. This yields the second policy:

"Officers attending other CSC level schools will receive the current command and staff level warfighting and support doctrine through resident elective program (preferred) or nonresident program or a combination thereof."

c. Selection system.

(1) One of the major thrusts of the Professional Development of Officers System is to provide the officer a body of knowledge and a frame of reference shift upon entry into a development period for long-term coherent development. These will be reinforced at each level to maximize the officer's effectiveness in future assignments. Therefore, it is envisioned that officers selected for resident CSC will attend as soon as possible after selection.

(2) Current MILPERCEN policy attempts to provide CSC experience early, but provides a four year window for selection, delaying self-development for those not selected, and reduces opportunity to complete MEL 4 requirements prior to selection to lieutenant colonel. This tends to make selection for schooling more important than the course material. PDOS policies have the effect of increasing resident opportunities for CSC by 50 percent, leaving only approximately 30-40 percent of eligible officers not attending a fulltime resident program. Ultimately, by combining the increased opportunities for MEL 4 with a reduced timeframe for selection, more officers will attend resident CSC.

(3) Since the schoolhouses (and the THS account) are unable to support 100 percent of all majors attending a resident CSC, majors selection boards should also designate those to attend resident CSC. This is a legitimate quality cut. All other officers not selected should be required to take the non-resident instruction (NRI) ver-

sion—an increase of approximately 20 percent over current levels. This yields the thi·d policy:

"Promotion boards selecting ma·ors will select officers for resident commar.d and staff level schooling."

(4) The Chief of Staff, Army did not approve this recommendation since the officer only had one chance for selection for resident CSC. PDOS felt that early attendance at CSC or enrollment in the correspondence program is important to provide the major with the frame of reference shift and body of knowledge required to perform as a field grade officer. Therefore, PDOS suggested consideration be given to narrowing the current window for selection to resident CSC to two years based upon an independent board selection. The first of the two boards should meet and select officers for the next course as soon as possible after the results of the majors selection board are released. The CSA did not approve this revised recommendation.

d. Alternative CSC opportunities.

(1) Selection for major may be one of the most critical points in the development of an officer along with consideration for attendance at CSC. He is making the transition from company grade to field grade, his organizational sights are raising to division and higher from brigade and lower, and he is shifting from a branch orientation to the combined arms. With that in mind, a couple of facts are important. First, while about 700 active Army officers a year graduate from CGSC, a sizeably larger number of active Army officers graduate through the correspondence route. Second, judging by board actions, the Army makes no distinction; MEL 4 is MEL 4 to promotion panels, and the last O-5 command list had 71 selectees who had taken CGSOC by correspondence.

(2) Having about 50—60 percen: of the Army's CGSOC graduates of the correspondence variety is both good news and bad. Good, in that a lot of officers get MEL 4 level schooling. Bad, in that so many miss out on those aspects that cannot be sent out in the mail: discussions with peers; face-to-face contact with faculty; time away from the frantic pace of today's duty to gain the professional growth that comes only from structured reflection. These are important aspects in the development of an officer which is not provided in the correspondence program.

(3) We should make a piece of the NRI course "resident" to provide a forum for application of other instruction in a wargame setting "putting it all together." This resident experience would establish the environment and situation to practice, assess, analyze, decide with speed and precision under pressure; integrating all aspects of combat, combat support and combat service support. It would also incorporate a thorough appreciation of the human dimension in a wartime situation (seminars, wargaming exercises, etc.). All of this would support the concept that the key field grade growth requirement is one of integration and synthesis in a complex decision making environment. It will also provide a small piece of the important socialization experience obtained during a resident course.

(4) Along these same lines, USAR schools instruct the Command and General Staff courses using a combination of both resident and non-resident modes. However, the resident aspects of the instruction do not have available the wargaming exercises which are so important to pull together all aspects of the "How to fight" and "How to support" program in a stressful environment.

(5) In the future, geographic cells can be established where there is a concentration of students participating in the NRI version. These cells can be connected to the "schoolhouse" by teleconferencing, electronic blackboard, television, etc. This will provide a better CGSOC-level experience, improving the educational interchange and increasing the socialization experience without traveling to Fort Leavenworth, therefore, the fourth recommendation is:

"There will be a resident phase in the correspondence program and USAR school CGSO course with a block of two weeks in length emphasizing integration of all elements in the current command and staff level warfighting and support doctrine. Technologies may allow this to be conducted at remote sites."

(6) MEL 4 is awarded only to CSC level graduates (includes resident, Army non-resident, constructive credit, and foreign schools). There are two schools, both TDY courses, that possess potential for future award of MEL 4 when connected with the common core alluded to in paragraph 2b above. They are the Program Manager Course (PMC) of 138 days offered by the Defense Systems Management College at Fort Belvoir and the Logistics Executive Development Course (LEDC) offe:ed by the Army Logistics Management Center at Fort Lee. Another possibility is the Training with Industry (TWI) program in which selected officers spend one year learning "how industry does it." Approximately

400 officers are scheduled to attend these programs annually.

(7) It would be in the Army's interest to take advantage of these already existing programs to increase the number of officers who can attend a resident experience to obtain their MEL 4. These programs teach how to think and broaden one's abilities, and teach how to decide, reason and judge which all leads to insights. The result is it increases decision making and develops the capacity to apply integrative/conceptual decision making skills where external factors are incorporated into one's job environment, i.e., achieves an enriched frame of reference and perspective with practice on how to apply it to tasks at hand. These opportunities recognize that certain tracks have special education and training requirements and, when coupled with the core, produce a well rounded educational program for selected field grade officers. Additionally, they increase efficiency of officers time and allow more career time in the unit/organization, and yet provide the necessary education and training. However, these three programs do not have the capability to provide the necessary "core" program. Therefore, as a policy:

"There will be alternative command and staff level schooling opportunities such as Training with Industry, Logistics Executive Development Course, Program Management Course, for the purpose of expanding the resident opportunities for command and staff level schooling. Officers in these alternative programs must achieve competency in the current command and staff level warfighting and support doctrine core."

(8) Currently, in an effort to expand MEL 4 opportunities, there are a number of officers who attend foreign schools without the benefit of a good US doctrinal grounding at the operational level. As a result, they are not always able to represent the US view of many issues in the school. Therefore, as a final policy:

"Officers attending foreign CSC level schools will complete the command and staff level warfighting and support doctrine core before they attend the foreign school."

e. Observations.

(1) Class composition.

(a) CSC-type education should provide a body of knowledge of all aspects of the Army. We need an officer who knows the nature and threat of war. As a professional, the public expects him to know and respond to their inquiries regardless of the branch brass he may happen to wear. They must be able to articulate Army positions and interface with the public. It is important that all officers know and understand the role they play and can focus their attention and expertise to the ultimate objective of the Army.

(b) Officers not assigned to a combat arms branch will be required to know and understand the fundamentals of soldiering. All officers must be "warrior's first" which includes:

1 A knowledge of the tactical level of war.

2 An understanding of joint and combined operations.

3 The ability to take command of a body of troops commensurate to their grade. This is particularly true if we believe the nature of future wars will be "islands of conflict."

4 The development of an action oriented military mindset and acceptance of full responsibilities.

(c) Therefore, all branches must be appropriately represented at the Command and Staff Colleges in order to achieve the true combined arms and support flavor that is desperately required for our future officer. This is especially true for the CGSOC. Historical evidence shows (see Tab A) that CSC resident selection rates generally follow a pro rata fair share by OPMD managed branches. This should continue since it represents selection based on best records. To ensure an adequate combined arms and services mix at CGSCOC, MILPERCEN and CGSC must continue to coordinate this requirement during the annual slating of selectees process. Tab B contains recent CGSOC attendance data by branches. There does not appear to be sufficient evidence to support changing our current system from one selecting the best qualified officers. Special branches must continue to participate in CSC, including the CGSC resident experience although not on a pro rata basis. A few should attend in order to provide a branch perspective on Army operations and allow some fertilization for their branch. The current selection and attendance rates for the special branches appears about right.

(2) CGSOC teaching methods.

(a) The two major breakthroughs in Army training and education of the last three-five years are obviously the inauguration of CAS3 and the Advanced Military Studies Program (AMSP). Each is extremely significant, but for different reasons. CAS3 is targeted on the whole officer corps. It teaches three fundamental staff skills -

military problem solving, written and oral communication, and staff coordination. This is all well known. What is not yet widely understood is that CAS3 has other spin-off effects that far transcend the implementation of the above skills and knowledge because they center on the inculcation of values. The first of these is teamwork. Day in and day out the CAS3 student is forced to work in a variety of different small groups. He learns by practical experience that the essence of successful staff work is teamwork and not individual brilliance. Allied to this he develops a combined arms perspective. CAS3 begins the process of stripping away branch blinders at a much earlier point in an officer's career than does the CGSO course. Additionally, CAS3 instills confidence in the officer and sends him back out into the Army feeling like the professionally competent officer that he is.

(b) AMSP is just as significant as CAS3, but the jury will be out on that question for another five to ten years. Its significance, however, is based on the tremendous conceptual impact it has on its students. Where CAS3 is 90 percent training and ten percent education and the CGSO course is 50 percent training and 50 percent education, AMSP is ten percent training and 90 percent education. It does not teach the student what to think, but it helps him develop a framework for how to think—and this thought is focused on the conduct of war at the tactical and operational levels—the soul of our profession.

(c) CAS3 and AMSP have very different foci, but their successes can be traced in part to a common feature—student centered learning in small groups vice instru.. or centered teaching in large groups. A definite need exists to bring the CGSO course up to the same standards of effectiveness of CAS3 and AMSP. We do need a good CGSO course. Two objectives should be considered for future planning.

1 Develop a larger, more experienced faculty.

2 Develop an integrated, small-group, student-centered learning approach with continuity of instruction, evaluation, and counseling. For further discussion on a mentorship strategy see Annex I.

3. CSA Remarks: The Chief of Staff, Army did not approve the recommendation that promotion boards selecting majors will select officers for resident command and staff level schooling since the officer only had one chance for resident CSC selection. However, he strongly endorsed the notion of a common core for all MEL 4 producing institutions including Armed Forces Staff College.

Tabs

A-Selection Rates for CSC, 1981-1983

B-CGSOC Atten. Rates for Academic Years 1984 and 1985

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Tab A to Appendix 1

Selection Rates for CSC, 1981 — 1983

CBT Arms	% of Elig	% of Sel	ADJ[1] % of Elig	ADJ[1] % of Sel
AD	4.1	5.6	5.2	5.9
AR	8.1	11.0	10.3	11.7
AV[2]	—	—	—	—
FA	9.2	11.0	11.7	11.7
IN	16.5	20.9	20.9	22.1
TOTAL	37.9	48.5	48.1	51.4
CBT SPT				
CM	0.8	0.9	1.2	1.0
EN	4.8	4.5	6.1	4.8
MI	6.6	9.2	8.5	9.8
MP	2.9	2.9	3.7	3.1
SC	6.5	6.6	8.3	6.9
TOTAL	21.6	24.1	27.8	25.6
CBT SVC SPT				
AG	5.7	6.8	7.2	7.2
FI	1.4	1.6	1.7	1.7
OD	3.4	3.6	4.3	3.8
QM	3.7	4.2	4.7	4.4
TC	4.9	5.8	6.3	6.1
TOTAL	19.1	22.0	24.2 (100.0)	23.2 (100.0)
SPEC BR				
ANC	4.2	0.1	19.7	1.9
CH	3.6	0.6	16.9	11.4
DC	2.8	0.3	12.9	5.1
JA	2.6	1.3	12.2	24.7
MC	1.2	0.7	5.4	13.3
MS	0.4	0.1	2.0	1.9
MSC	6.3	0.2	29.6	40.0
VC	0.3	0.2	1.4	3.8
TOTAL	21.4	3.5	100.0	100.0

[1] OPMD compared to OPMD; Special Branches compared to Special Branches.

[2] Not a branch during this timeframe.

Tab B to Appendix 1

CGSOC Attendance Rates for Academic Years 1984 and 1985

CBT ARMS	ACTUAL PCT
AD	4.5
AR	8.8
AV	12.9
FA	9.7
IN	18.8
TOTAL	54.7

CBT SPT	
CM	0.9
EN	4.8
MI	7.1
MP	2.5
SC	4.7
TOTAL	20.0

CBT SVC SPT	
AG	6.5
FI	1.3
OD	3.5
QM	5.1
TC	2.9
TOTAL	19.3

SPEC BR	
ANC	0.3
CH	0.7
DC	0.4
JA	1.4
MC	0.7
MS	0.1
MSC	2.1
VC	0.3
TOTAL	5.9

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Appendix 2 to Annex DD

Advanced Military Studies Program (AMSP)

1. PURPOSE. The purpose of this annex is to outline the requirements, benefits and policies pertaining to the Advanced Military Studies Program which is offered within the School of Advanced Military Studies (SAMS) at the Command and General Staff College, Fort Leavenworth KS.

2. DISCUSSION.

a. Requirements.

(1) The requirement for an Advanced Military Studies Program is based on the position that the preparation for and the conduct of war has become too complex to master in the confines of a one year course. Conditions of warfare have changed dramatically since the post WWII assessment was made that the army could not afford and did not require a two year CGSC course. Warfare tends to be much more rapid, lethal, and decentralized. Decisive battlefield decisions can be reached more quickly. The task of battlefield integration of combat, combat support and combat service support means has grown immensely complex.

(2) The increasing complexity of strategic and tactical options in terms of weapons systems and supporting requirements have made it increasingly difficult to master the Art and Science of War. Combat Support and Combat Service Support must be integrated and function during periods of warfighting that are characterized by rapid change, increased ranges for damage, and isolation of significant portions of the battle area. These trends will continue at an accelerating pace. While margins for error on the battlefield, and in preparing for battle, are now significantly less than they were in WWII and Korea they will continue to decrease rapidly. What is most significant is that the Staff College students of today will personally experience changes in the conduct of war during the remainder of their careers as significant as those experienced in all of the years since WWII.

(3) Developing a key segment of the officer corps capable of not only keeping pace with change but actually shaping that change effectively is imperative. Notable also is the fact that the Soviets invest heavily in the education of their best officers and are investing heavily in the development of scientific methods of combat leadership. While their methods may not fit our style of war, they can make the Soviet officer a formidable opponent. The preceptions of the majority of senior leaders with whom this program has been discussed is that there is a gap between the levels of officer competencies they observe and those they would be comfortable with. This observation applies to staff planners at all levels and in all functional areas. Other first rate armies take more time to educate their officers for good reason.

(4) Staff college training, which occurs in all other first rate armies at about the same career point as it does in ours, is illustrative of our relative austerity. The Israelis send their staff college selectees to 46 weeks of school, supplemented with 9 additional weeks for those chosen to command battalions. The Canadians send all officers to a 20-week staff course and a selected minority to 45 weeks of preparation for service on higher level staffs. The British and Germans each devote about 100 weeks while the Russians put their potential general staff officers through an astonishing 150 weeks of intensive education. In sharp contrast is the United States' modest 42 week of CGSOC instruction.

(5) The concept of a second year of instruction at Fort Leavenworth is not new. Prior to both World War 1 and World War II a two year course of instruction was taught at Fort Leavenworth. In both instances the two year course reverted to a one year curriculum as a result of requirements to train more officers.

(6) Present requirements for officers who are well versed in in-depth skills at the operational and integrator level are not easily defined. An

assessment of requirements at 37 operational headquarters (OJCS Div) would indicate that there are approximately 300 positions requiring an advanced level of knowledge in basic air-land warfare operational techniques.

b. Purpose.

(1) The purpose of the second year course (AMSP) is to provide a broad, deep military education in the science and art of war at the tactical and operational levels that goes beyond the CG-SOC in both theoretical depth and practical application to officers who have demonstrated a high degree of potential for serving as principal staff officers of division and corps, and as branch chiefs and deputy chiefs on major command and Department of the Army level staffs or their equivalents. The course focus is on operational planning skills and on developing sound military judgment across the entire spectrum of *present* and *future* US Army missions in the preparation for and conduct of war.

(2) One purpose of this course is to develop a group of officers who are better prepared to serve as our future principal staff officers at divisons and corps and who can better serve in those key jobs at higher Army joint and combined staffs requiring broad integration and conceptualization skills.

(3) The other purpose of this course is to seed the Army with a number of officers annually who will produce a leavening influence on the Army by their competence and impact on other officers.

(4) It is not to be the intention of this program to produce an elite corps of officers who will receive special treatment and more rapid advancement, except that their next assignment be close to troops. The latter is necessary to complete their preparation. After this they will be allowed to rise purely on their own merit. They will not comprise a new elite shadow "general staff."

c. Benefits. The pay-off to the Army will be long term but considerable. In short, a core of officers with refined military judgment, greater competence in tactics and operations, and a more fully developed professional ethic will help produce better plans, better force structures, better training and better units and therefore will increase the probability of future tactical and operational success. The officers in the first course will be battalion XOs, brigade principal staff officers, and assistant principal staff officers at division level from FY 85 to FY 87. From that time until FY 95, they may be battalion commanders, division principal staff officers and staff assistants at higher levels. During this time they will also attend the Senior Service Colleges. From FY 95 until about FY 03, these officers will command units from brigade on up and provide a portion of the senior leadership of the Army.

d. Findings. The forgoing discussion concerning the requirements, purpose and benefits of an Advanced Military Studies Program (AMSP) are in large part a synopsis of existing studies which caused the inception of the program. An analysis of the basic studies and the current program which is being taught, identifies five salient points.

(1) The benefits of an AMSP are potentially great.

(2) Any current attempts to outline cost/resource/benefit tradeoffs with existing data are highly subjective.

(3) The current AMSP course and the impact of its graduates are presently unproven.

(4) Current AMSP selection criteria and procedures appear to be sound. Experience over time may dictate some adjustments however, the primary selection role should remain with CDR CAC.

(5) The Army must test and evaluate the cost/resource/benefit implications before proceeding with any increase beyond the present 48 students. (Currently an Army Research Institute study proposal exists.)

(6) A primary aim should be to continue to provide a small number of officers a broad and deep education in the art and science of war at the tactical and operational level.

(7) The School for Advanced Military Studies (SAMS) should be continued as part of the Command and General Staff College.

3. Recommendations. The following expansions of the base policies will be initiated pertaining to the Advanced Military Studies Program.

a. CSC graduates will be provided opportunities for an Advanced Military Studies Program (AMSP) emphasizing the integration of the Art and Science of War at the operational level, in joint and combined operations and across the spectrum of conflict.

(1) There will be a formal evaluation program to assess the full requirements for Advanced Military Studies in terms of resource and facility needs, and optimum enrollment policies in terms of Army benefits.

(2) Enrollment will be limited to 48 students per academic year until data is developed on student/cost/benefit tradeoffs. Maximum future enrollments should not exceed 96 students.

(3) All majors Army-wide who have completed CSC-level schooling and demonstrate high potential to serve as a principal staff officer at division and corps levels may apply for the program.

(4) A DA Circular which defines the purpose, scope and methodology for Advance Military Studies selection and enrollment will be published. Primary selection role will remain with the Commander, CAC.

3. CSA Remarks. Supported the program but is concerned that they are assigned properly to take advantage of their talents.

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Appendix 3 to Annex DD

Branch Qualification: Field Grade

1. PURPOSE. To describe the responsibilities for field grade branch qualification and define generic qualification criteria in relationship to branch assignments.

2. DISCUSSION.

a. General. Under the current dual specialty concept, an officer ideally alternates assignment between the two specialties. The officer is expected to maintain proficiency in both specialties even though it is possible to not have served in one of them for as much as six years and, in the case of branch, not have had formal training and education since the Officer Advanced Course. Officers selected for field grade command are given the opportunity through the Pre-Command Course to receive refresher training in their branch's doctrine and equipment.

b. Branch refresher training. Self-development is the responsibility of the individual officer, however, the Officer Professional Development System has the responsibility to provide the tools to allow the officer to accomplish self-development. The field grade officers not selected for command and even those who have not yet reached command eligibility, do not have adequate or easily accessible tools available to maintain or refresh branch skills when serving outside the branch. These officers, in addition to those slated for command, require proficiency in branch when assigned to a position designated with a branch code. For these reasons, the following policy is established.

Each branch school will provide a course of instruction or package for field grade officers to refresh and acquaint them with the latest branch doctrine and new equipment.

c. Field Grade Branch Qualification. The Officer Personnel Management System has the responsibility to ensure that personnel assigned to a position have the qualifications specified in the position code. If in the coding, a branch is designated, the officer assigned must be branch qualified. For field grade officers upon implementation of the aforementioned policy, qualification would involve completion of the branch program of instruction or package or else have just completed a branch related assignment. The program of instruction or package could be either resident or non-resident. Non-resident instruction should be used to the maximum extent possible. It is recognized that some training such as new equipment orientation cannot be accomplished in a non-resident mode and a resident program will be required. Each branch proponent will have to determine which method best fits the needs of the branch while providing reasonable consideration of resource constraints. If the course of instruction is resident, the assignment officers must provide for attendance enroute to the branch assignment for officers coming out of a functional area or branch immaterial position. If the package is non-resident, the assignment instructions should specify that the non-resident course be completed prior to reporting for the new assignment. This yielded the following subpolicy.

All field grade OPMD managed officers will receive branch refresher prior to branch assignment from a functional area or branch immaterial assignment.

3. CSA Remarks. None.

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Appendix 4 to Annex DD

Glossary

AFSC: Armed Forces Staff College.

AMSP: Advanced Military Studies Program.

CAI: Computer Assisted Instruction.

CGSOC: Command and General Staff Officers Course.

CSC: Command and Staff College. A broad term used to describe Command and General Staff College and institutions which produce a Military Education Level 4 status.

CAS3: Combined Arms and Services Staff School.

Field Grade Officer: The grades of Major and Lieutenant Colonel.

LEDC: Logistics Executive Development Course.

MEL 4: Military Education Level 4. Completion of the Command and General Staff College or equivalent.

MEL 4 Distribution Plan: A distribution plan developed at HQ DA which defined a specified minimum allocation of officers possessing a MEL 4 commensurate with established priorities.

MILPERCEN: Military Personnel Center.

MQS: Military Qualification Standards (MQS)-An Army-wide officer training system that identifies the skills and knowledge the officer must acquire in order to perform his duties effectively. It involves the officer, his commander, and the service school in his professional development.

MQS IV and V: Provides the officer with the skills and knowledge to acquire the fundamentals of Army and Joint staff procedures and expand their basic knowledge of the doctrinal basis for combined arms employment. Performed at the major and lieutenant colonel level.

OAC: Officers Advance Course.

OPDS: Officer Professional Development System.

OTRA: Other Than Regular Army.

PMC: Program Manager Course.

THS: Transient, Holding, School.

TWI: Training With Industry.

USAR: United States Army Reserve.

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Appendix 5 to Annex DD

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RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
102 All active component officers will complete a resident or non-resident command and staff level course prior to selection to LTC. This school will include a command and staff level warfighting and support doctrine core.	a. Announce policy.	ODCSPER	2d Qtr FY85	1, 2
	b. Develop command and staff core requirements.	TRADOC (P), USACAC	4TH Qtr FY86	
	c. Institute core program in the resident course.	TRADOC (P), USACAC	1ST Qtr FY87	
103 There will be a resident phase in the correspondence program and USAR school CGSO course with a block of two weeks in length emphasizing integration of all elements in the current command and staff level warfighting and support doctrine. Technologies may allow this to be conducted at remote cites.	a. Initiate MCA programming action for construction of additional classrooms.	TRADOC (P), USACAC, OCE	2D Qtr FY85	1, 3
	b. Develop resident phase of non-resident CGSOC and USAR CGSOC incl core program.	TRADOC (P), USACAC FORSCOM, OCAR	2D Qtr FY92	
	c. Complete construction of additional classrooms.	TRADOC (P), USACAC	2D Qtr FY92	
	d. Complete purchase equipment for classrooms.	TRADOC (P), USACAC	2D Qtr FY92	

NOTES: 1/ All participants in the CGSOC program regardless of the method, will be a graduate of the CAS3 by FY 94. Therefore, an upgrade of the CGSOC should take place at the beginning of FY95.
2/ Officers should attend CGC level program, resident or nonresident, as soon as possible after selection to Major.
3/ If it is expected that technology will advance sufficiently to provide realtime linkage with the USAR schools, the resident phase may not be required, but an investment of the technology will be. In addition, if the technology is developed and procured, the two week resident phase could be conducted on a regional basis where the largest concentration of students are located. However, in this option additional facilities will be required therefore the costs are assumed to be the same regardless of where the program is conducted.

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
106 There will be alternative command and staff level schooling opportunities such as Training with Industry, Logistics Executive Development Course, Program Management Course, for the purpose of expanding the reside : opportunities for command and staff level schooling. Officers in these alternative programs must achieve competency in the current command and staff warfighting and support doctrine.	a. Identify MEL 4 producing instit and connecting program requirements.	ODCSPER (P), TRADOC,	4th Qtr FY86	1
	b. Initiate MCA programming action for construction of additional classrooms.	TRADOC (P),USACAC, OCE	2D Qtr FY85	
	c. Develop resident phase MEL 4 connecting course.	TRADOC (P), USACAC	2D Qtr FY92	
	d. Complete construction of additional classrooms.	TRADOC (P), USACAC	2D Qtr FY92	
	d. Complete purchase equipment for classrooms.	TRADOC (P), USACAC	2D Qtr FY92	
107 Officers attending other CSC level schools will receive the current Army CSC level warfighting and support doctrine through resident elective program (preferred) or nonresident program or a combination thereof.	a. Begin negotiations with other Command and Staff Colleges.	TRADOC (P), USACAC	4th Qtr FY86	1, 4
	b. Develop Army core requirements for each Command and Staff College.	TRADOC (P), USACAC	4th Qtr FY88	
	c. Institute mandatory elective program for MEL 4 certification.	TRADOC (P), USACAC	1st Qtr FY89	1
116 Officers attending foreign CSC level schools will complete the command and staff level land warfighting and support doctrine course before they attend the foreign school.	Actions should be conducted in conjunction with above two recommendations.			

NOTES:

1/ All participants in the CGSOC program regardless of the method, will be a graduate of the CAS3 by FY 94. Therefore, an upgrade of the CGSOC should take place at the beginning of FY95.

4/ Officers attending foreign command and staff level schools will complete the command and staff level warfighting and support doctrine "core" before they attend the foreign school. Until the MCA construction is completed, officers attending a foreign command and staff level school should be required to take the SC 54 CGSOC NRI course.

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
110 CSC graduates will be provided opportunities for an Advanced Military Studies Program (AMSP) emphasizing the integration of the Art and Science of War at the operational level, in joint and combined operations, and across the spectrum of conflict.	a. Establish and conduct an evaluation program to assess the full requirements for Advanced Military Studies in terms of resource and faculty needs and optimum enrollment policies in terms of Army benefits.	ODCSOPS (P) TRADOC ODCSPER	2 QTR FY 90	
	b. Limit enrollment to 48 students per AY until cost/benefit analysis is complete. Maximum future enrollment should not exceed 96.	TRADOC (P)	1 QTR FY 85	
	c. Develop and publish interim DA Circular on AMSP.	ODCSOPS (P) TRADOC	3 QTR FY 85	
	d. Reach decision on future enrollment and policies. Publish revised DA Circular.	ODCSOPS (P) TRADOC ODCSPER	2 QTR FY 90	

NOTES:

TO2 ALL MAJORS WILL COMPLETE A RESIDENT OR NONRESIDENT COMMAND AND STAFF LEVEL SCHOOL PRIOR TO LTC.

CORE DEVELOPMENT
- DEVELOP CORE
- INSTITUTE CORE PROGRAM
- PROGRAM / UPDATE

USAR SCHOOLS WITH RESIDENT
- DEVELOP
- MCA CONSTRUCTION
- RESIDENT PHASE—USAR CGSC
- PROGRAM / UPDATE

NONRESIDENT WITH RESIDENT
- MCA CONSTRUCTION
- UPGRADE NRI WITH CORE
- PREPARE RESIDENT PHASE
- RESIDENT PHASE INSTITUTED
- PROGRAM / UPDATE

ALTERNATIVE CGSC PROGRAMS
- MCA CONSTRUCTION
- ID MEL 4 PRODUCING INSTITUTIONS
- PREPARE SHORT COURSE
- 480 SHORT COURSE
- IMPLEMENTED (LEDC, PME, TLOI NOW) MEL 4 WITH CORE)
- PROGRAM / UPDATE

SISTER SERVICE SCHOOLS
- DEVELOP CRITERIA FOR MEL 4
- STUDENTS TAKE NRI IF REQUIRED
- PROGRAM / UPDATE

RESOURCES

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY								240	240	240	240	240
STAFF AND FACULTY—MIL/CIV		2/0	2/0	2/0	4/0	4/0	38/15	38/15	38/15	38/15	38/15	38/15
TDA CHANGE—$ MILLIONS		15.8						5.3	5.3	5.3	5.3	5.3

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PHASING PLAN

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
RESOURCES												
STUDENTS NR/MY	24 24	24 24	24 24	24 24	24 24	24 24	1	1	1	1	1	1
STAFF AND FACULTY–MIL/CIV	8/0	12/0	12/0	12/0	12/0	12/0	1	1	1	1	1	1
TDA CHANGE–$ MILLIONS	.005	.01	.01	.01	.01	.8						

PLAN EVALUATE DECISION EXECUTE ≤ 96 Students DEVELOP RESOURCE IMPLEMENT PLAN

ADVANCED MILITARY STUDIES PROGRAM

(1)
CONTINUE AMSP FOR SELECTED STAFF COLLEGE GRADUATES.

o ESTABLISH FORMAL EVALUATION PROGRAM.

oo ASSESS RESOURCE BENEFITS AND TRADEOFFS.

oo HOLD AT 48 STUDENTS UNTIL ANALYSIS IS COMPLETE.

Author: LTC Petersen
Team Chief: COL Rowe

Annex EE
Development Period: Colonel

1. PURPOSE. To describe the requirements and educational experiences for the colonel.

2. DISCUSSION.

a. Background.

(1) The development period of the colonel begins with the officer's selection to the grade of colonel and ends upon retirement or selection for general officer. Approximately 50 percent of Army lieutenant colonels will be promoted to colonel. This selection process is designed to ensure that only those officers whose performance of duty and potential for further service rise to positions of great responsibility within the Army.

(2) Officers promoted to colonel are highly motivated professionals who have a diversified assignment pattern, generally in two or more specialties, have usually attended all traditional Army educational schools, very often possess an advanced degree from a civilian institution, and have usually commanded at least once during their career. From this select group will rise the executive level of leadership that will determine the future of the Army. It is essential that these officers are provided the necessary educational tools and opportunities which will ensure that their capabilities and potential are fully developed and utilized in the future.

(3) In the United States Armed Forces, as well as many foreign armed forces, the traditional educational opportunity provided on a selective basis to officers who have or are expected to attain the rank of colonel or higher has been the Senior Service College (SSC). The Army War College (AWC) curriculum has been designed to serve as a catalyst to assist the student in the transition to a higher professional level and frame of reference. The other Senior Service Colleges (Air, Industrial College of the Armed Forces, National, and Navy) serve the same purpose, although with a different orientation peculiar to that college's mission.

b. What the colonel must BE-KNOW-DO.

(1) The primary role of the colonel is that of an integrator—one who can successfully manage many systems and orchestrate those systems in such a way as to achieve a stated purpose. As a senior leader, the colonel must not only possess advanced reasoning and analytical abilities but must develop the cognitive skills which are essential to successful performance in the demanding positions to which he will be assigned. Colonels are expected to be experts in their designated specialty(ies) and capable of providing guidance and direction to the many individuals and programs under their control.

(2) The colonel must understand the role of the Army in national and international strategy and policy. He must have a complete understanding and appreciation for the interrelationships between the combat, combat support, and combat service support systems as well as joint and combined forces and operations. As senior leaders, they must fulfill roles and responsibilities as integrators and branch/functional experts in leading and staffing Army and defense organizations. Their warfighting orientation is on operations and support doctrine at corps and echelons above corps; however, they must understand the entire spectrum of conflict and are intimately involved in policy and decision making at the strategic level of war.

(3) Colonels command, direct, organize and train brigade or equivalent level (including joint and combined) TDA organizations. They shape the environment for the development of personal and unit values congruent with Army values and set the climate for command. self-development and mentoring. They serve as role models for the Army at large and represent the Army before outside organizations. They rely heavily on synthesizing processes for decision making while retaining skills from earlier analytic processes which enable them to assess, allocate and integrate forces required to plan and execute tactical and operational plans to meet any contingency.

c. The Environment of the Colonel.

(1) The average time in service for the lieutenant colonel selected for promotion to colonel is 20.6 years of commissioned service. These are officers who have elected to remain in the Army and who have been recognized as possessing the quality and potential for further service at the highest levels of the Army. Approximately ten percent were selected from below the promotion zone and of those, approximately 90 percent were senior service college graduates. Of those selected in the primary zone, approximately 45 percent were senior service college/equivalent graduates

(2) These officers are highly qualified in their specialty(ies) and can be called upon to serve in a variety of demanding positions throughout the Army and the Department of Defense. Approximately 40 percent of all colonel positions are branch immaterial and 88 percent are in TDA organizations.

(3) The primary educational experience available to these officers is senior service college, resident or non-resident, or alternative educational opportunities that result in award of the Military Educational Level 1 (MEL 1) designation. Current policy specifies that all lieutenant colonels who have neither received credit for attendance nor declined to attend resident SSC, have completed a Command and Staff College, and are between their 16th and 23rd year of commissioned service, are eligible to be selected for attendance at SSC. Eligibility criteria for the Army War College Corresponding Studies Program (AWCCPS) is similiar, but expands the grades and years of service. Current regulations specify that the AWCCPS is the only non-resident SSC eligible for award of MEL 1. For Academic Year (AY) 84-85, 319 OPMD officers were selected for resident and 149 for non-residence attendance.

(4) In the AY 84-85 class 99.7 percent were colonels, lieutenant colonels (promotable) or lieutenant colonels in either the primary or secondary zone to colonel; 86 percent had completed command at the lieutenant colonel level.

(5) While approximately 50 percent of the officers eligible are promoted to the rank of colonel, only 20 percent are selected for resident SSC attendance. Currently 68 percent of serving colonels/lieutenant colonels (promotable) have been or will be awarded MEL 1. To ensure that the SSC graduates are equitably distributed throughout the Army, 85 percent are assigned under the provisions of a MEL 1 distribution plan.

(6) Command opportunity for colonels is 20 percent and only ten percent may be selected in their first year of eligibility.

(7) Current law specifies that mandatory retirement for colonels is 30 years of service, however in a very few cases (currently 34) a colonel may remain on active duty in a recall/retention status.

(8) The selection rate for promotion to brigadier general is approximately eight percent.

d. Roles in the Development Period for the Colonel.

(1) Individual. The role of the individual officer is focused on gaining an in-depth education and expanded frame of reference of Army staff and operational procedures, concentrating on joint and combined planning and operations at echelons above corps using: the military reading program, computer-assisted instruction (CAI) packages, video and audio teleconferences and wargames to augment field training opportunities. The officer will continue to use assessment technology to monitor his own strengths and weaknesses while serving as a senior mentor "expert" in an area of concentration, functional area or branch assignment. The officer will evolve insights from educational and developmental opportunities in unit/organizational assignments and shift his decision style to handle "non-programmed" types of decisions required at higher levels, while retaining decision making skills used at lower levels.

(2) Mentor. The role of both the school and unit mentor is to explain/reinforce the higher frame of reference at the colonel level. As a result the colonel will possess demonstrated expertise in integration of weapons systems and support functions necessary to obtain and sustain these systems (extensive use of computer simulations, field training and visits to the National Training Center support this task). All mentors will serve as mentor instructors in support of video-audio teleconferencing.

(3) Unit/organization. The unit/organization of assignment will provide experiential developmental opportunities to relate school theories to the real world and will include multiple electronic training support aids in officer development programs.

(4) Service school. The school role remains oriented on teaching, providing training support materials for the field and keeping the knowledge base current for multiple users and functions while continuing to stress the need for more complex integrative and synthesis skills. When developed, the use of artificial intelligence expert systems oriented on decision making will be added to the school curriculum.

e. Methods to Emphasize.

(1) The individual officer should take advantage of field trips, case studies, and professional reading to increase his knowledge. The application of this knowledge and further development can occur through Computer Assisted Instruction packages, computer teleconferencing and computer simulations (wargames). The Officer Professional Development System will continue to recognize that on-the-job training and immediate evaluation and feedback on performance remains a cornerstone of the officers educational process.

(2) The mentor should maximize the use of field trips, case studies, and field practical exercises to demonstrate real world applications to the theory. Professional reading and instruction in a small group mode to facilitate the professional development of officers will also be useful in providing the teaching and coaching officers require.

(3) The unit/organization must take advantage of real world field training or experiential application of the theory using real world applications. Useful techniques would be CAI packages, computer teleconferencing and computer simulations (wargames).

(4) The schools should include field trips, case studies, field practical exercises and small group instruction applying real world considerations. Instruction should include CAI packages, computer teleconferencing and computer simulations (wargames). As the technology develops, learning will also be enhanced using "smart" courseware and artificial intelligence—expert systems.

f. Objective. The aim of this Development Period is to develop a colonel who possesses the body of knowledge, conceptual and cognitive skills, expanded frame of reference and integrative ability to perform successfully in senior command and staff positions at high levels within the Army and Department of Defense.

g. Thrusts.

(1) Provide all Active Component OPMD officers the opportunity to obtain MEL 1 upon selection to colonel.

(2) Warfighting (echelons above corps) and "How the Army Runs" will be part of the core curriculum for all MEL 1 producing programs.

(3) Meet the pre-command needs of all Active and Reserve Component officers (See Annex R).

(4) Formalize the linkage between the intermediate and senior level schools.

3. Recommendations. The base policies for this Development Period are:

a. All active component (OPMD) lieutenant colonels (promotable) and colonels will receive the opportunity to attain MEL 1 level education (resident/non-resident/other).

(1) Colonel promotion boards will identify resident attendees.

(2) Remaining selectees will be enrolled in the AWC or other non-resident program.

b. All officers awarded MEL 1 will complete two courses: Warfighting (Echelons Above Corps) and "How the Army Runs" which are to be offered and conducted by AWC.

c. The AWC will remain a Field Operating Agency of ODCSOPS. A formal curriculum coordination procedure will be developed between TRADOC and AWC.

d. A Pre-Command Course will be developed and tailored to the needs of Reserve Component lieutenant colonel and colonel commanders.

e. An Army Regulation will be published with defines Pre-Command Course policies, purposes, and responsiblities (see Annex R).

4. CSA Remarks. The CSA conceptually approved the base policies with the following exceptions.

a. The decision on the policy that only lieutenant colonels (promotable) and colonels will attend SSC was disapproved.

b. The policy that the colonels promotion board would identify the resident attendees for SSC and the concept of an officer having only one opportunity for selection to resident school was disapproved. The CSA wanted to retain two separate boards for selection to colonel and SSC attendance, with the continued opportunity for multiple looks by different boards.

Appendices.

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Team Chief: COL Rowe

Appendix 1 to Annex EE

Senior Service College and Equivalent Level Education

1. PURPOSE. To describe the requirements and proposed system for colonels to obtain Senior Service College (SSC) and equivalent level education.

2. DISCUSSION.

a. The senior service colleges of the US Armed Forces have been traditionally viewed as the premier military educational institutions that an officer can be selected to attend. It caps the educational career of the most successful officers and provides the population from which general officers are selected. While approximately 50 percent of the officers eligible are promoted to the rank of colonel, only 20 percent are selected for resident SSC attendance. Currently, of the approximately 460 general officers on active duty, only ten are not graduates of a SSC.

b. Each SSC has a defined mission-specific task as recommended by the DOD Committee on Excellence in Education:

(1) Army War College – Land Warfare

(2) Naval War College – Sea Warfare

(3) Air War College – Air Warfare

(4) National War College – National Security Policy Formulation

(5) Industrial College of the Armed Forces/Defense Management and Materiel Acquisition

c. The Joint Chiefs of Staff have defined the Professional Military Education objectives of the senior level colleges as:

(1) To provide an advanced level of knowledge of the mission-specific warfare doctrine and the capabilities of the sponsoring Service or organization.

(2) To provide knowledge about, and to enhance individual capability to participate in, the planning and employment of joint and combined forces.

(3) To provide knowledge and understanding of the missions, tasks, and resources of other branches of the Armed Forces and of those agencies and branches of government and industry that contribute to national security.

(4) To provide knowledge and understanding of the DOD decisionmaking and implementation process at the executive level.

(5) To teach the art and science of formulation and implementation of national security policy.

(6) To enhance leadership and management skills and to provide executive level knowledge of the analytical techniques used in the decision making and implementation processes.

(7) To enhance knowledge and advanced comprehension of the national and international security environment.

(8) To provide the opportunity, through research, to develop warfighting doctrine and to offer solutions to current national security issues.

d. During 1984 US Army officers selected for SSC were assigned to:

(1) US Senior Service Colleges—

(a) Army War College

(b) Naval War College

(c) Air War College

(d) National War College

(e) Industrial College of the Armed Forces

(2) Equated Foreign Colleges—

(a) British Royal College of Defence Studies

(b) Canadian National Defence College

(c) Inter-American Defense College

(3) Equivalent level educational programs

(a) Harvard University

(b) Atlantic Council

(c) USAWC Advanced Operational Studies Fellowship Program

(d) Army Research Associates Program

(e) Georgetown University Center for Strategic International Studies

e. Both the Review of Education and Training for Officers Study (RETO) and the Officer Personnel Management System Study (OPMS-1983) determined that the reason why the Army educates the number of officers it does and the educational philosophy of SSC level education was unclear. One of the major issues facing the Professional Development of Officers Study was to define a specific purpose of SSC level education, and based on that purpose, how many of the Army's senior field grade officers should receive this level of education. PDOS defined the purpose of SSC level education as follows: To prepare colonels of both the Active and Reserve Components for service, during peace and war, in command and staff positions requiring the leadership and management of diverse activities at the highest levels of responsibility which require increasingly frequent interface with other services, government agencies and civilian institutions. This education will be oriented on:

(1) The study of joint and combined plans and operations.

(2) Historical aspects of warfare and the evolution of current U.S. national and military strategy and policy.

(3) Knowledge of readiness, mobilization, modernization, and future technology.

(4) Improvement of executive level skills in leadership, command and management to include strategic decision making, analytic and conceptual techniques, personnel and resourcement management, communication and organizational theory.

(5) Increased responsibilities as a role model to establish the work environment, set the example, enforce standards, and develop subordinates.

f. The responsibilities the colonel will encounter, especially in light of future technological changes, makes it imperative that he be provided the necessary decision making skills at the appropriate time to ensure his success on the future battlefield, in high staff positions, or in any other demanding position he may assume. Because we expect the colonel to possess a frame of reference which is significantly expanded, and at a higher level, it is incumbent on the Army's professional development system to provide every colonel the opportunity, regardless of background, specialty, or previous experience, to attain the skills which will enable him to operate at that higher frame of reference. This educational experience must take place early in the developmental period, preferably, upon selection for colonel. When the new colonel assumes his first position, he must possess the knowledge and skills necessary to successfully perform in his role as a senior leader. To ensure the colonel possesses the skills expected of him, it is necessary that all officers promoted to colonel attain MEL 1. This supposition leads to the first policy:

All Active Component colonels/lieutenant colonels (promotable) will receive SSC equivalent level education (resident/non-resident/other).

g. This policy contains four specific recommendations:

(1) Colonel promotion boards will identify sufficient selectees, including alternates, for Active Component attendance at resident SSC level schooling; the remaining officers will complete the United States Army War College Corresponding Studies Program (USAWCCSP), or other non-resident program.

(2) Ensure that officers are slated to the SSC/equivalent which bests meets the needs of the Army and the officer's qualifications and projected utilization.

(3) Selectees will complete the USAWCCSP or other non-resident program within three years.

(4) SSC education opportunities (both resident and non-resident) for Reserve Component officers will continue as a minimum, at current levels.

h. Additionally, several other recommendations are included in the implementation plan which will assist in meeting the goal of this policy.

(1) The officer would be selected for a resident school by the colonel promotion board, however, the slating process would be conducted within MILPERCEN by Colonels Division, OPMD. The primary consideration for attending a particular college/equivalent would be the officer's qualifications and projected utilization, without undue consideration to PCS costs. For example, if the Army and the officer would benefit most from attending the AWC, he should not be slated to the National War College simply be-

cause he is currently assigned in the National Capital Region.

(2) It should be recognized that there are officers who are selected for promotion to colonel who by the nature of their academic background, previous assignments, and performance in those assignments have already experienced the transition in their frame of reference that is the basis for SSC attendance. In these cases the Army should recognize this and give that officer constructive credit for SSC level education and award him a MEL 1. This can be accomplished through the use of a Constructive Credit Board which would review the records of officers referred to it by the colonels promotion board, Commander, MILPERCEN, or Chiefs of the Special Branches. To enable the Constructive Credit Board to determine if an officer is indeed qualified for award of MEL 1, a minimum qualification standard must be developed. This standard would be used as a template against which the officers qualifications would be measured. Officers who do not meet the standard could, at the discretion of the board, be programmed for a particular course(s) which would then qualify them for award of MEL 1.

i. Ideally, all colonels would attend a resident SSC, however resource constraints within the Army as well as the other Services preclude 100 percent resident attendance. It is essential that some Army officers attend other Service SSC and vice-versa. This cross fertilization of ideas and understanding is necessary to insure that all officers understand the joint and combined aspects of warfare, and staff procedures. If additional resident seats become available in the future, the Army should take advantage of accepting more officers from other services at the AWC and sending additional officers to another Service SSC. An alternative to resident SSC attendance is sending eligible officers to civilian institutions or other equivalent programs which meet the purpose of SSC level education. In 1984, twenty-one fellowships to either civilian or military MEL 1 producing programs were utilized for resident SSC selectees. These programs are and will continue to be of significant value to the Army. Additional programs should be pursued as an ideal alternative to the limited seats available at resident SSC. Another alternative to provide MEL 1 to eligible officers is the use of non-resident SSC programs. Currently AWCCSP is the only non-resident SSC program which qualifies for award of MEL 1. The non-resident programs of the Air and National War Colleges should be analyzed and compared against the MEL 1 template. Sufficient space is available in

these programs to accommodate all Army colonels who desire to enroll in them. Additionally, space is available in the National War College program to accomodate many lieutenant colonels who may desire to enroll in a SSC program before consideration for selection to colonel. Additional requirements to these programs, as compared to the template, could be provided by the AWC in a resident or non-resident mode which would enable the student to meet the minimum requirements for award of MEL 1. The concept of alternative methods of achieving the purpose of SSC level education and subsequent award of MEL 1 is the rationale for the second policy:

Continue to expand MEL 1 opportunities through the use of fellowships, research programs, or other programs which meet the purpose of SSC level education.

j. Colonels who are awarded a MEL 1, from whatever source, are expected to possess a minimum level of competence in selected core subjects. This level of competence exists as a result of previous education and training and experience. At the SSC level of education this common core of subjects encompasses an understanding of national strategy and policy, executive development skills, integrative and cognitive skills, the human dimension of combat, a historical perspective of war, the ability to envision future wars and how the Army runs and fights. Each SSC program educates its students to some degree in most of these common core areas. The two areas that are not sufficiently covered in any SSC program, except the resident AWC program, are how the Army runs and how it fights. It is absolutely essential that a colonel have a full understanding and appreciation of warfighting at echelons above corps and how the Army runs and fights. To achieve this goal the AWC should develop both a "Warfighting Echelons Above Corps" and "How the Army Runs" course which could be presented to all officers who are awarded MEL 1, regardless of source. The courses could be conducted at Carlisle Barracks in a TDY enroute or return mode, incorporated in the elective programs of the other SSC, presented by an instructor team from AWC, conducted through computer assisted instruction or in any other way that achieves the desired result. A wargame simulation should be incorporated in the warfighting course and it should parallel as closely as possible the AWC resident course.

The concept of a common c .e for award of MEL 1 is established by the third policy:

Officers awarded MEL 1 will complete a warfighting-echelons above corps and "How

the Army Runs" module, supported by AWC.

k. This policy contains two specific recommendations.

(1) AWC develop a Warfighting-Echelons Above Corps module of common warfighting skills, including a wargame simulation, and incorporate it into the AWC curriculum, including the AWCCSP.

(2) AWC adapt the resident "How the Army Runs" course to the AWCCSP.

l. Curriculum relevance and currency is essential to insure that the AWC student is provided the necessary information which will enable him to successfully complete the missions expected of him after graduation. The staff and faculty of the AWC do a good job in updating the curriculum and presenting the student with the most recent information available. Curriculum relevance however, can best be determined by what a graduate does or does not do after leaving the academic institution. One of the most practical methods of determining how relevant the curriculum is to the needs of the graduate is to ask him. A routine procedure of surveying graduates and utilizing their responses to validate the current curriculum and assist in developing future curriculums would provide a real world analysis of what the AWC should or should not include for future classes. Other SSC use this technique and are pleased with the responses from their graduates and consider it a valuable program. Because this program can be administered with few resources and the potential benefits appear substantial, the following policy was recommended:

> AWC conduct a follow-up survey of Army SSC graduates to validate curriculum relevance and assist in future curriculum development.

m. Currently, Army authorization documents are not coded to reflect a specific requirement for a graduate from a particular SSC. There is no discipline of the requisition system regarding the distribution of colonels who possess a MEL 1. Traditionally, requisitioning authorities have coded requisitions for a SSC graduate to indicate a "quality" need, not necessarily because the position required an officer with skills gained from his SSC attendance. Under the recommendations of PDOS, all colonels would ultimately possess a MEL 1. However, certain positions

should require graduates of specific SSC, e.g., a division chief at SACLANT, would best be filled by a graduate from the Naval War College. Those positions which specifically require or would best be filled by an officer who has graduated from a particular SSC should be indicated as such. Furthermore, a solid data base could be used to determine if the Army needs more or fewer officers who should attend a specific college. As a result of the OPMS Study recommendations, an Army-wide review of TAADS is to be conducted. With little additional effort requisitioning commands could determine which of their positons, if any, require or would best be filled by a graduate from a particular SSC, or other MEL 1 source. In view of this current effort the following policy was recommended:

> Include in the guidance for the TAADS position review that a particular MEL 1 source be specified, if appropriate, to meet position requirements.

n. Currently at the AWC there are 20 seats in the resident and 130 seats in the non-resident class for Reserve Component officers. This study recommends that the allocation of seats not change. If additional seats in either program become available as a result of expanding SSC alternatives, a proportional number should be slated for Reserve Component officers. The total Army is an integral part of the PDOS recommendations and colonels of all components must, to the maximum extent possible, take advantage of this educational opportunity. Full utilization of graduates is essential, therefore, the following policy is recommended:

> All USAR officers selected for MEL 1 schooling will receive priority for nomination to Reserve Unit position vacancies and Individual Mobilization Augmentee positions.

3. CSA Remarks.

a. The decision on the policy that only lieutenant colonels (promotable) and colonels will attend SSC was disapproved.

b. The policy that the colonel promotion board would identify the resident attendees for SSC and the concept of an officer having only one opportunity for selection to resident school was disapproved. The CSA wanted to retain two separate boards for selection to colonel and SSC attendance, with the continued opportunity for multiple looks by different boards.

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Team Chief: COL Rowe

Appendix 2 to Annex EE

Army War College Curriculum Coordination

1. PURPOSE. To recommend a curriculum coordination procedure be formalized between the Army War College and the Training and Doctrine Command.

2. DISCUSSION.

a. Army Regulation 351-1, Individual Military Education and Training and Army Regulation 10-44, United States Army War College, specifically state: "The Commandant, USAWC and the CG, TRADOC will coordinate curriculum to ensure that the overall education program and doctrine are consistent within the Army."

b. The RETO study highlighted the disconnect in continuity of joint and combined land warfare instruction between the AWC and CGSC and commented that the problems which existed in instructional coordination were recognized and were being addressed by the Commandants, staff, and faculty of the two institutions.

c. While significant informal coordination exists between the two institutions, especially in the area of doctrinal development, no formal mechanism is in place to insure that the curriculum of the two institutions complement each other or prevent a potential gap in the instructional presentation to the student.

d. A Memorandum of Understanding between AWC and TRADOC which delineates specific procedures for curriculum development and coordination should include the forum or means to accomplish the coordination, give specific times for coordination meetings, and outline the responsibilties of each organization in this coordination effort to insure that "the overall education program and doctrine are consistent within the Army."

e. Based on the above rationale, this policy was recommened:

Establish a formal curriculum coordination procedure between AWC and TRADOC.

3. CSA Remarks. None.

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Appendix 3 to Annex EE

Advanced Management Program

1. PURPOSE. To establish a policy for the selection of colonels to attend schooling under the Advanced Management Program (AMP).

2. DISCUSSION.

a. AMP is an executive education program for colonels. Several colleges and universities conduct seminars annually for executives from industry, government, and the military. These seminars are designed to assist the transition from mid to senior level management, broaden an individuals perspective, and expand his frame of reference. Course durations range from one to six weeks. Costs range from $2000 to $10,000 plus travel and per diem.

b. The program is managed by the Officer Personnel Management Directorate (OPMD). Annually, quotas are projected on the anticipated availability of officers and funds. For FY 84, fifty quotas were established.

c. Each year, the field submits written justification for AMP position validation. An internal MILPERCEN board reviews and validates the positions. In 1984, 293 positions were approved. Only those colonels assigned or enroute to a validated position are eligible to attend an AMP course.

d. The current AMP validation process raises several issues.

(1) Not all positions within the Army are reviewed by the MILPERCEN board, therefore many which may be worthy of validation are not considered.

(2) Annual AMP quotas are not sufficient to meet all validations.

(3) Many colonels with the greatest potential will not attend AMP because they are not assigned to validated positions.

e. A three year study by the Army War College concluded in 1980 that:

(1) All colonels should attend SSC, but because of resource constraints, only those with the *greatest potential* have the opportunity to attend.

(2) It is impossible to establish criteria which could be used to identify positions which require graduates of a SSC. The study concluded that the value of the SSC experience is not peculiar to any particular position. Its value is "found in the broadening of perspectives, the increased awareness of the complexities of international, national, and Army issues, the realization that few major problems have single or simple solutions, and the discovery that for almost any problem multiple definitions, multiple alternative solutions, and multiple prognosis exist." Although of much shorter duration, the AMP experience aquaints one with similar considerations as those in SSC.

f. Because of the difficulty associated with validation of AMP positions and the recognition that the Army should continue to educate its future leaders, attendance at an AMP course should be oriented on an officers potential for further service over the remainder of his career. Therefore, an officer should be selected to attend an AMP course based on his potential, regardless of his current or projected position.

g. Based on the above rationale, this policy was recommended:

Eliminate the current AMP position validation process and select only those colonels for AMP schooling who possess the greatest potiential for continued service.

3. CSA Remarks. None.

Authors: LTC Petersen/LTC Russell
Team Chief: COL Rowe

Appendix 4 to Annex EE

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RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
SO1: o All AC COL/LTC(P) will receive SSC/equivalent level education (resident or nonresident).				
oo Colonel promotion boards will identify sufficient selectees including alternates, for AC attendance at resident SSC level schooling; Remainder will complete the USAWCCPS, or other non-resident program.	The LOI to COL promotion boards will specify that the board will identify a specific number of selectees to attend resident SSC level schooling, and a specific number of alternates.	ODCSPER	2d QTR FY 89	NOTE 1
oo Insure that officers are slated to the SSC/equivalent which best meets the needs of the Army and the officer's qualifications and projected utilization.	The identified officers will be slated to a particular SSC or equivalent program. Alternates will be used, as required, to fill all SSC/equivalent seats.	MILPERCEN	2d QTR FY 89	NOTE 2
oo Selectees will complete the USAWCCPS or other non-resident program within three years of enrollment.	The slating board (COL Division, OPHD) will insure that selectees attend a particular college/equivalent which best meets the needs of the Army based on the officer's qualifications and projected utilization, without undue consideration to PCS costs.	MILPERCEN (P) ODCSPER	2d QTR FY 89	
oo SSC educational opportunities (both resident and non-resident) for RC officers will continue, as a minimum, at current levels.				

NOTES:

1. The CSA deferred a decision on only LTC(P) and COL being selected for SSC until further study is completed on the potential of aging senior officers.

2. The CSA disapproved the single "look" recommendation for SSC selection. A multiple "look" system is to be retained.

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
SO2: o Continue to expand MEL-1 opportunities through fellowships/research programs/other.	SSC equivalent level education opportunities should continue to be identified and utilized to the maximum extent possible, including fellowships, research programs, and the NDU and Air War College non-resident programs.	ODCSOPS (P) ODCSPER	1st QTR FY 89	NOTE 3
	A Constructive Credit Board will review officers records, of both OPMD and Special Branches, referred to it by the CDR MILPERCEN or Chiefs of the Special Branches.	ODCSPER (P) MILPERCEN CH, SPECIAL BRANCHES	2d QTR FY 86	
	Constructive credit will be awarded to officers who through education, training, and experience meet the established purpose of SSC level education.	ODCSPER (P) MILPERCEN AWC	2d QTR FY 86	

NOTES:

3. Award of MEL-1 to graduates of the NDU and Air War College non-resident programs would only be possible after the student completed all "core" courses (See recommendation SO3).

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
SO3: o Officers awarded MEL-1 will complete a Warfighting-EAC and "How the Army Runs" module, supported by AWC. oo AWC develop a Warfighting/EAC module of common warfighting skills, including wargame simulation, and incorporate it into the USAWCCPS. oo AWC adapt the resident "How the Army Runs" course to the USAWCCPS.	A minimum qualification standard for award of MEL 1 will be developed and provided to the Constructive Credit Board for their use in awarding MEL 1 to an officer. Officers who require additional education/training to meet the minimum qualification for award of MEL 1, will be provided that opportunity.	AWC (P) ODCSOPS ODCSPER MILPERCEN (P) ODCSPER	1st QTR FY 87 2d QTR FY 87	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
	Based on the purpose of SSC level education, a common core of subjects should be identified that all officers awarded MEL-1 should receive. At least two courses will be a part of this common core: "Warfighting-EAC" and "How the Army Runs".	ODCSOPS (P) AWC	4th QTR FY 88	
	The common core subjects of "Warfighting-EAC" (including a wargame simulation) and "How the Army Runs" will be developed for the AWCCSP and adapted for all students who do not attend the AWC/AWCCSP, or for officers who require the course(s) to receive constructive credit.	AWC (P) ODCSOPS ODCSPER MILPERCEN	4th QTR FY 88	
SO4: o Establish a curriculum coordination procedure between AWC and TRADOC.	A MOU be initiated which establishes a procedure to coordinate the curriculum between the AWC and CAC to insure the overall education program and doctrine are consistent within the Army.	ODCSOPS(P) AWC. ODCSPER MILPERCEN	3d QTR FY 86	

NOTES:

Appendix 5 to ANNEX EE
Action Plan

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
SO5: AWC conduct a follow-up survey of Army SSC graduates to validate curriculum relevance and assist in future curriculum development.	The follow-up survey should include graduates from other SSC and equivalent level MEL 1 sources to permit the review of the overall MEL 1 producing program.	AWC (P) ODCSOPS ODCSPER MILPERCEN	3d QTR FY 86	
SO6: o Include in the guidance for the TAADS position review (OPMS recommendation) that a particular MEL-1 source (eg. National, ICAF, AIR War College) be specified, if appropriate, to meet position requirements.		ODCSOPS (P) SSC	1st QTR FY 86	

NOTES:

EE-5-5

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
SO7: o LTC will be encouraged to continue their professional development education through available non-resident programs.	A consolidated list of available professional development correspondence courses at the SSC level, of all services, will be published and distributed to all LTC which will include course objectives, prerequisites, what part of the minimum qualification for award of MEL 1 the course provides and application procedures.	MILPERCEN (P) ODCSPER	2d QTR FY 87	
SO9: USAR officers selected for MEL-1 schooling will receive priority of nomination for reserve unit position vacancies and individual mobilization augmentee positions.	Identify officers with MEL 1.	ARPERCEN	ONGOING	
	Maintain a current listing of IMA and TPU position vacancies at the COL/LTC level.	ARPERCEN	ONGOING	
	Insure priority of assignment of MEL 1 officers to fill existing vacancies.	ARPERCEN	ONGOING	
S10: o Colonels will be selected for the Advanced Management Program based on the officers potential for continued service.		MILPERCEN	1st QTR FY 86	

NOTES:

DEVELOPMENT PERIOD - COLONEL

SO1 ALL AC COL/LTC(P) WILL RECEIVE SSC/EQUIVALENT LEVEL EDUCATION (RESIDENT OR NON-RESIDENT).

00 COL PROMOTION BOARDS WILL IDENTIFY SUFFICIENT SELECTEES, INCLUDING ALTERNATES, FOR AC ATTENDANCE AT RESIDENT SSC LEVEL SCHOOLING; REMAINDER WILL COMPLETE THE USAWCCSP, OR OTHER NON-RESIDENT PROGRAM.

00 ESTABLISH SSC SLATING PROCEDURE.

SO2 CONTINUE TO EXPAND MEL-1 OPPORTUNITIES THROUGH FELLOWSHIPS/ RESEARCH PROGRAMS/SELECTED NON-RESIDENT PROGRAMS/CONSTURCTIVE CREDIT.

Chart labels: CURRENT SSC BOARD CONTINUES · SSC BOARD TERMINATES · AY 89-90 SSC CLASS · TEST · TEST

RESOURCES

	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
STUDENTS NR/MY	5	10	15		37	37	37	37	37	37	37	37
STAFF AND FACULTY-MIL/CIV	2/0	3/0	3/0		10/4	10/4	10/4	10/4	10/4	10/4	10/4	10/4
TDA CHANGE-$ MILLIONS	.1	.1	.1		1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3

PHASING PLAN

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
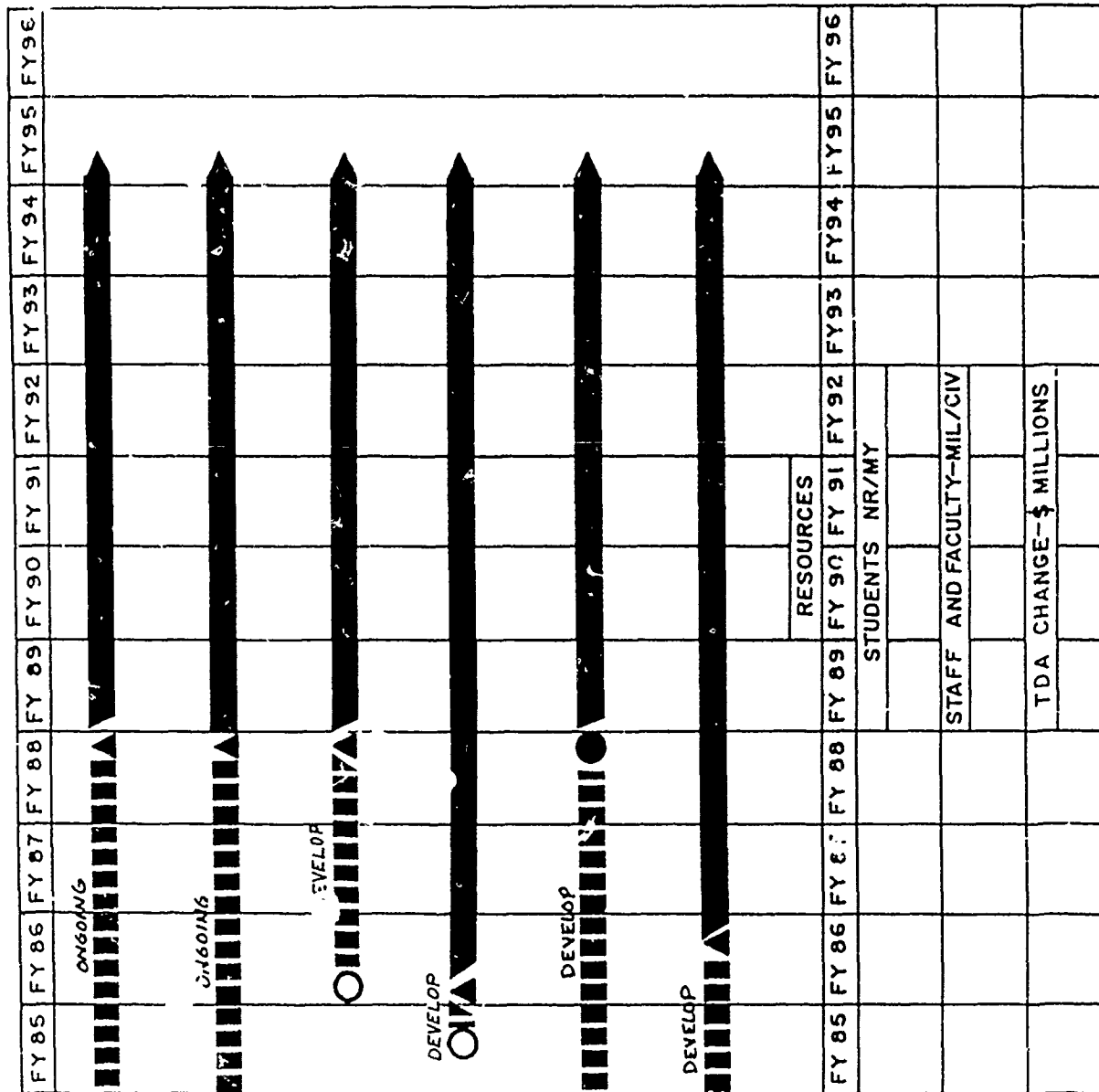
oo CONTINUE EFFORTS TO IDENTIFY AND UTILIZE CIVILIAN FELLOWSHIP PROG MS.   (ONGOING)

oo INCREASE PARTICIPATION IN THE ARMY RESEARCH ASSOCIATE PROGRAM.   (ONGOING)

oo AWARD MEL-1 TO ARMY OFFICERS WHO COMPLETE THE NATIONAL WAR COLLEGE AND AIR WAR COLLEGE NON-RESIDENT PROGRAMS AFTER COMPLETION OF SPECIFIED COURSES (SEE S03).   (DEVELOP)

oo ESTABLISH A CONSTRUCTIVE CREDIT BOARD.   (DEVELOP)

S03 o OFFICERS AWARDED MEL-1 WILL COMPLETE A WARFIGHTING/EAC AND "HOW THE ARMY RUNS" MODULE. SUPPORTED BY AWC.   (DEVELOP)

o DEVELOP AND IMPLEMENT IN AWC RESIDENT PROGRAM.   (DEVELOP)

RESOURCES

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY												
STAFF AND FACULTY—MIL/CIV												
TDA CHANGE—$ MILLIONS												

PHASING PLAN

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96

o ADAPT MODULE TO AWC:SP.

o EXPORT MODULE TO RESIDENT ATTENDEES AT OTHER SSC.

o ADAPT MODULE FOR EQUIVALENT SSC LEVEL STUDENTS AND NON-RESIDENT STUDENTS OF OTHER SSC PROGRAMS.

o DEVELOP MINIMUM QUALIFICATION FOR AWARD OF MEL-1 (CORE CURRICULUM).

S04 o ESTABLISH A CURRICULUM COORDINATION PRODUCURE BETWEEN AWC AND TRADOC.

S05 o AWC CONDUCT A FOLLOW-UP SURVEY OF ARMY SSC GRADUATES TO VALIDATE CURRICULUM RELEVANCE AND ASSIST IN FUTURE CURRICULUM DEVELOPMENT.

RESOURCES

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY												
STAFF AND FACULTY-MIL/CIV												
TDA CHANGE-$ MILLIONS												

EE-6-3

PHASING PLAN

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96

S06
o INCLUDE IN GUIDANCE FOR IAADS POSITION REVIEW THAT A PARTICULAR SSC BE SPECIFIED. IF APPROPRIATE FOR A POSITION.

S07 (DP-3 MAJ-LTC)
o LTC WILL BE ENCOURAGED TO CONTINUE THEIR PROFESSIONAL DEVELOPMENT EDUCATION THROUGH AVAILABLE SSC NON-RESIDENT PROGRAMS.

oo SSC PROFESSIONAL DEVELOPMENT PAMPHLET PUBLISHED.

S09
o ALL USAR OFFICERS SELECTED FOR MEL-1 SCHOOLING WILL RECEIVE PRIORITY FOR NOMINATION TO IMA AND TPU POSITION VACANCIES.

S10
o MILPERCEN SELECT COLONELS FOR THE AMP BASED ON THE OFFICERS POTENTIAL FOR CONTINUED SERVICE.

RESOURCES

STUDENTS NR/MY

STAFF AND FACULTY-MIL/CIV

TDA CHANGE-$ MILLIONS

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96

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Team Chief: COL Rowe

Annex FF

Development Period: Brigadier and Major Generals

1. PURPOSE. This annex outlines the requirements and development of brigadier and major generals.

2. DISCUSSION.

a. Background.

(1) Promotion to brigadier general represents the most selective transition in an officer's professional career. DOPMA places stringent limits on the number of active general officers (currently 412) based on the authorized strength of the Army. Thus, the several dozen brigadier generals selected each year have joined the top executive and leadership ranks of the officer corps.

(2) The transition is distinctive also in the quantum jump in expectations subordinates and the public have of generals as compared to colonels. People in and out of the service expect generals to give direction and to decide what things are important to do. They also ascribe to general officers a mystique—a belief "that generals have some secret way of doing business that leads to greatness". Thus, Army brigadier and major generals have entered a development period in which the increase in responsibilities, expectations and, of course, prestige exceeds that of any previous transition.

b. What Brigadier and Major Generals Must BE-KNOW-DO:

(1) All general officers epitomize a lifetime of commitment and service to the Army and the nation. They must be circumspect in their ethics and behavior; each presents the image of the Army in all public action. Generals must also convey an attitude of calm, rational, seasoned judgment in order to set a command climate which fosters efficiency and confidence.

(2) Increasingly, a colonel's demonstrated technical expertise plays a role in his selection to brigadier general and subsequent assignments. Yet, all general officers need to understand the broad perspective of the Total Army in order to give purpose and direction to their organizations. Most will require, at some point, an expanded frame of reference that includes joint and combined interaction and civil-military interface. Thus the new general must become expert on how the Army runs from troop duty and installation management through the Army's role in the national defense establishment. And, despite the press of daily events in peacetime, the general must nurture an understanding of doctrine and the conduct of wartime combat or support operations from division through theater levels.

(3) It is at the level of brigadier and major general that the officer must learn to command or lead indirectly. In command positions, he integrates staffs and subordinate commanders who directly command organizations. In both command and staff positions, he must establish an organizational climate productive of mutual confidence and understanding. His success depends to a great degree on his ability to communicate intent and accomplish through motivation.

(4) Brigadier and major generals operate at levels where complexity and uncertainty are critical factors to be managed. The basic "nature of the job" is dramatically different than that of colonel and new tools and skills are required to accomplish it. The problems brought to the general for resolution demand of him more than analytical dissection; they require conceptual thinking and a synthesizing of diverse elements and disciplines. The new general finds himself deciding issues for his organization or the Army as a whole, the impacts of which will be felt years after his departure. The general's development, therefore, must enhance his capacity for multivariate thinking and for looking out to anticipate complex and uncertain future needs. The general faces the same conditions of complexity and uncertainty in combat but must be prepared to make decisions under much more compressed time constraints.

c. The Environment of Brigadier and Major Generals.

(1) Each year the Army selects 60-70 officers to be brigadier generals, representing two percent of eligible colonels. On average the new brigadier general has 24 years of service and 4.5 years in grade as a colonel. Most have benefited from at least one below-the-zone promotion. Nearly all have attained Military Education Level 1.

(2) Brigadier and major general assignment patterns are highly diverse. About 20 percent at a given time serve overseas. Some 40% serve in Army CONUS commands. Another 25 percent serve on the DA Staff or its field operating agencies. The remaining 15 percent occupy DOD, JCS, CONUS unified command, or special activity positions. Many brigadier generals serve as deputy commanders or assistant division commanders. More command positions exist for major generals. The majority of assignments available during this development period, however, will be at the integrating staff level.

(3) A significant and growing number of general officer positions require either a specific branch or functional area background. In this sense, the first two general officer grades mirror the trend for OPMS-managed officers toward development of in-depth expertise beyond basic branch skills to meet Army needs. This trend will continue in the future. Generals will need well developed executive and leadership talent as always, but they will increasingly come to their jobs with qualifications as experts, qualifications that will be essential to competent direction of the Army. An understanding of joint operations provides one example of needed expertise. Some 35 percent of brigadier generals and 55 percent of major generals hold positions involving significant joint or joint and combined interface.

(4) Brigadier generals meet as a body one time, at the annual orientation conference following their selection. This two week (a voluntary one week for Reserve Components) series of briefings, seminars and addresses currently constitutes their only common developmental experience as general officers. In recent years many brigadier generals have attended a week long executive development course at the Center for Creative Leadership (See Appendix 1, Transition to Brigadier General).

(5) Additionally, there exist programs of continuing education for all general officers based on individual need and availability. These programs range from attending senior management courses in universities to joint service and Army courses to tactical/operational seminars conducted by MACOMs or service colleges. Assignment oriented programs prepare officers for specific positions, e.g., pre-command courses for division and corps commanders, installation and project management courses, senior officer legal orientations (See Appendix 2, General Officer Continuing Education).

(6) About 70 percent of brigadier generals can expect promotion to major general. Mandatory retirement for brigadier generals occurs at 30 years of service or five years in grade, whichever is later. Promotion opportunity for major generals is approximately 25 percent. Mandatory retirement for those not promoted is the later of 35 years of service or five years in grade.

d. Roles in the Development of Brigadier and Major Generals.

(1) Individual: General officers play the key role in their own continuing development. They determine their own needs based on knowledge of their responsibilities, communication with their superiors and opportunities made available by HQDA. Generals pursue their own professional reading programs, seeking to expand executive capacity and an understanding of politico-military affairs. Generals become senior mentors in any organization and learn the art of shaping command climate. They must learn new skills and the use of new tools to manage the enormous amounts of information availabile to them in a manner which will favorably influence the outcome of events over the "long haul."

(2) Mentor: Mentor-protege relationships become very personalized at the general officer level. Brigadier and major generals will often look for counsel to seniors outside their chain of command, including retired generals. Nonetheless, senior generals invest considerable time with direct subordinates. They establish modes of communicating command priorities and intent. Mutual understanding at this level plays a key role in the health of any command.

(3) Unit/Organization: MACOMs give emphasis and time for generals to pursue professional development objectives. They accept the importance of having deputies fill principals' positions during periodic absences by generals attending training or education programs. MACOMs also hold frequent command seminars, exercises or conferences to enhance decision-making skills and achieve other general officer development goals.

(4) Schools: Army schools sponsor short courses and seminars for general officers. They also provide reading lists and distribute educational materials through a variety of media including computer assisted instruction packages. They also work to develop "smart" courseware and decision support systems suited for senior leader information management and decision making. Civil schools provide an array of executive level courses in such areas as management and national security.

e. Methods to Emphasize.

(1) The principal methods by which general officers achieve continuing development include individual reading, frequent communication with peers and seniors, field visits, seminars, exercises and a variety of civil or military short courses. In future years, teleconferencing, expert systems and artificial intelligence will acquire significant roles in general officer on the job development. Weekly Summary articles are one means of distributing information needed by generals; dissemination of speeches and policies from DA is another.

(2) A vital aspect of development is effective inter-assignment transitioning. Time for discussion with one's prospective superior, identification of individual training requirements and attendance at appropriate courses all are components of a complete transition.

f. Objective: The professional development aim at this level is to derive a coherent system for the transition to general officer and the continuing education of brigadier and major generals.

g. Thrusts: The major thrusts of this development period are:

(1) to enhance the Brigadier General transition program;

(2) to expand opportunities for general officer interassignment training, developmental education and orientational updates;

(3) to consolidate management of general officer development programs.

3. Recommendations. The base policies for this development period are:

a. Transform the current Brigadier Generals' Conference into a formal transition program of four to six weeks duration spread over a period of time, including:

(1) an executive self-development course;

(2) land warfare and policy impact analysis exercises;

(3) force integration training;

(4) DA Staff briefings;

(5) long term policy imput analysis exercises;

(6) tailored assignment preparation.

b. Expand inter-assignment, developmental and orientational programs:

(1) Increase participation in executive development programs and DA/MACOM seminars.

(2) Seek JCS approval to double the frequency of the CAPSTONE Course.

(3) Develop information management and public affairs training programs tailored to general officer needs.

c. Consolidate responsibility for general officer development and assessment programs under one executive development organization (as recommended by the Senior Leadership Coordinating Committee).

4. CSA Remarks. The Chief of Staff conceptually approved these base policies. He commented that the current Brigadier Generals' Conference should not be increased beyond the present two weeks. He agreed with increased transitional training for brigadier generals outside the current format and locale and over an extended time frame.

Appendices:

1-Transition to Brigadier General
2-General Officer Continuing Education
3-Bibliography
4-Action Plan
5-Phasing Plan

Author: LTC Witherspoon
Team Chief: COL Rowe

Appendix 1 to Annex FF

Transition to Brigadier General

1. PURPOSE: This appendix reviews the current Brigadier Generals' Conference and proposes a formal transition program to replace it.

2. DISCUSSION.

a. Transition Needs: Brigadier generals come to the rank with a broad range of experience behind them. They cross a distinctive threshold in terms of prestige, exclusive membership, responsibility and expectations others have of them. The positions they will hold as generals will vary in the nature of technical knowledge required, but will demand a more or less common level of executive competency and understanding of the Army. A transition program to brigadier general must allow for these requirements to be met. New brigadier generals must possess in-depth expertise related to their pending assignments, have extensive executive talent and know how to run the Army in peace and in war.

b. The Current BG Transition: Within a few months of selection brigadier general designees attend a two week Brigadier Generals' Conference in the Washington area. This conference consists primarily of a series of briefings and talks by Army and DOD leaders. There are excursions for a stress management orientation, a visit to Congress and seminars on generalship. Also included is instruction in financial and installation management. In 1984 Force Integration Training was added to the curriculum. Nevertheless, the predominant claimants of time are the continuous stream of talks and briefings by the Army and other service leadership and DA staff principals (See Tab A, Active Component Brigadier Generals' Conference, 1984).

c. Shortcomings and Policy Recommendation: As constituted, the Brigadier Generals' Conference falls short in several respects from satisfying brigadier general transition needs.

(1) Not all new brigadier generals attend an executive development course. Promotion to brigadier general signifies membership in the Army's corporate executive directorship, yet there is no guarantee that an officer has acquired the necessary understanding of himself or alternative management styles at this higher level. Given the demands about to be placed on them for leadership and management of large organizations, a guided self-assessment course for all new generals is essential. Over the past six years 76 general officers have attended the Leadership Development Program of the Center for Creative Leadership. Nearly all attendees have commended the program for its value in making them aware of their own strengths and weaknesses and pointing out effective decision-making and organizational management techniques.

> Within their first year in grade all brigadier generals should attend an executive self-development course of approximately a week's duration.

(2) The conference orients too exclusively on the peacetime Army. The change in wartime frame of reference from colonel to general is every bit as great as that for peacetime functions. Generals should have a common understanding of national strategy and the Army's operational doctrine. They should prepare to direct the Army's transition to war and theater operations. Their specific responsibilities need to be linked through a shared concept of Army joint and combined doctrine. To this end the brigadier general transition program should include a seminar in Army doctrine and an exercise involving planning and operations at theater level or above. A suggested venue and model for this segment of the transition are the Army War College and its General Officer Professional Development Conference.

> Brigadier Generals should participate in a seminar on Army operational doctrine and a land warfare exercise of approximately five days duration.

(3) The current conference devotes insufficient time to "generalship." A *Joint Perspectives* article entitled "The Black Box is Empty" dispelled the myth that brigadier general desig-

nees automatically know how to be generals by virtue of their selection. The article, in detailing the changes generalship brings to an officer's life, stands as a primer on the subject. It offers important insights into this complex transition. The brief periods alloted to generalship in the past two conferences met with overwhelming popularity. The formal transition program should give the techniques, formalities, public expectations and other nuances of "generalship" more prominence.

> The brigadier general transition program should include a minimum of one full day of generalship seminars and orientations.

(4) The conference provides the new general with an overview of current policies but presents no perspectives on the broadened nature of policy planning and policy making intrinsic to general officer responsibilities. The general officer's frame of reference involves extended time horizons over which his decisions will have effect. His decision environment also entails treating with complex and uncertain futures. He will more likely find success by using more complex thinking processes (multi-variate analysis, synthesis, conceptualization). To facilitate this aspect of the transition new brigadier generals should experience a future policy impact exercise as described in Annex B.

> The brigadier general transition program should include a future policy impact exercise of approximately two days duration.

(5) Tailored assignment preparation remains ad hoc in many cases and is left to the officer's discretion. Inevitably, though an officer may desire to take advantage of a developmental opportunity, the press of business, once one has reported for duty, takes precedence. The new general gets trapped by his diligence. Adding to the pressure is the fact that there is no THS account for general officers. Thus the pressure to be on the job with little interruption affects all generals. The solution lies in a systemic acceptence of underlap and the routinization of inter-assignment preparation for all generals.

> All brigadier generals should be afforded the opportunity to receive tailored assignment training based on identified need, interaction with their future superiors and developmental opportunities made available by HQDA.

(6) The current conference format is too long. Some 45 speakers addressed the October-November 1984 conference (not including Force Integration and Management Training or the Generalship seminars). Many participants felt this was excessive and recommended a reduc-

tion. Additionally, the brigadier general designees singled out the Force Integration Training as too detailed for their level unless they expected to work next in the Pentagon.

> The brigadier general transition program should include a five to seven day DA/DOD orientation conference. Supplemental readings covering DA Staff issues and policies should complement scheduled presentations.

d. Summary Transition Policy. Develop a formal brigadier generals' transition program that provides the newly selected brigadier general an appreciation of: himself, generalship and his future role; the Army and its major undertakings; national strategy, strategic planning and long-range policy implications; operational and tactical doctrine in joint and combined contexts; and the requirements of his first assignment.

e. Management of the Program. Besides Force Integration Training, the Brigadier Generals' Conference is the only DA-level general officer program managed outside the General Officer Management Office (GOMO). The Director of the Army Staff's Protocol Office has consistently won praise from attendees for its organization and administration of the Conference. Nevertheless, given the expansion proposed above, GOMO (with an appropriate increase in staffing) is the appropriate agency to provide overall coordination for the Brigadier General Transition Program. The ongoing study of General Officer/Senior Executive Service Leadership under the auspices of the Senior Leadership Coordinating Committee (SLCC) will result in comprehensive recommendations affecting general officer development and management. PDOS has worked closely with the SLCC Working Group in the course of this study and defers to the SLCC's pending recommendations regarding the future management structure for general officer development programs. The Phasing Plan at Appendix 5 assumes creation of a small staff element of military and civilians within ODCSPER.

> Consolidate responsibility for all general officer professional development programs (including the brigadier general transition program) under GOMO. Ultimately, transfer responsibility for general officer professional development programs to an executive development organization, as determined by the Senior Leadership Coordinating Committee.

3. CSA Remarks. See paragraph 4, Annex FF.

Tab A Active Component Brigadier Generals' Conference, 1984

ACTIVE COMPONENT BRIGADIER GENERALS CONFERENCE

TIME	SUBJECT	AGENCY/PRESENTER
SUNDAY, 28 OCTOBER	(Best Western Springfield Inn, Fairfax I)	
* 1300 - 2100	Arrival and Registration	Protocol
1900 - 2100	Arrival Mixer	Protocol
MONDAY, 29 OCTOBER	(DeWitt Auditorium, NWC; Civilian attire)	
0730 - 0815	Remarks by the Vice Chief of Staff, Army	VCSA GEN Thurman
0815 - 0830	Break	
0830 - 0900	Remarks by the Director of the Army Staff	Director, ARSTAF LTG Brown
0900 - 0915	Break	
0915 - 1015	Director, Program Analysis and Evaluation	DPAE MG Woods
1015 - 1030	Break	
1030 - 1130	Deputy Chief of Staff for Research, Development, and Acquisition	DCSRDA LTG Wagner
1130 - 1300	Lunch - OPEN	
**1300 - 1330	Treadmill Orientation	OTSG COL Bedynek
1330 - 1430	The Surgeon General	TSG LTG Mittemeyer
1430 - 1445	Break	
1445 - 1530	Remarks by the Secretary of the Army	SA HON Marsh

* Issue course materials
** Treadmill test schedule to be announced

TIME	SUBJECT	AGENCY/PRESENTER
1530 - 1545	Break	
1545 - 1645	Assistant Chief of Staff for Intelligence	ACSI LTG Odom
1900 - 2100	Vice Chief of Staff's Reception - Ft McNair Officers Club, Ballroom; Army Greens	Protocol

TUESDAY, 30 OCTOBER (DeWitt Auditorium, NWC and Springfield Inn, Fairfax I & II; Civilian attire)

TIME	SUBJECT	AGENCY/PRESENTER
0745 - 0845	Deputy Chief of Staff for Personnel	DCSPER LTG Elton
0845 - 0900	Break	
0900 - 1000	Remarks by the Commandant of the Marine Corps	CMC GEN Kelley
1000 - 1015	Break	
1015 - 1200	Deputy Chief of Staff for Operations and Plans	DCSOPS LTG Mahaffey
1200 - 1330	Lunch-OPEN Strength Development Clinic (Optional) Ft McNair Gymnasium	OTSG
1330 - 1500	Generalship Seminars	ODCSPER
1500 - 1515	Break	
1515 - 1615	Chief of Public Affairs	CPA MG Bussey
1615 - 1630	Break	
1630 - 1730	The Adjutant General	TAG MG Joyce
1930-2100	Nutrition and Weight Control/ Effects of Stress	OTSG MAJ Emerson/ Dr. Weiss

ADDENDUM

WEDNESDAY, 31 OCTOBER (Capitol Hill and DeWitt Auditorium,
NWC; Civilian attire)

TIME	SUBJECT	AGENCY/PRESENTER
0800 - 0830	Breakfast - Capitol Hill Room B339	OCLL
0830 - 0915	Chief, Legislative Liaison	CLL MG Patrick
0915 - 0930	Break and Movement to Room B318	
0930 - 1000	Congressional Speaker (House of Representatives)	OCLL Congressman Bennett Florida (D)
1000 - 1030	Congressional Speaker (House of Representatives)	OCLL Congressman Leath Texas (D)
1030 - 1100	Congressional Speaker (U.S. Senate)	OCLL Senator Eagleton Missouri (D)
1100 - 1130	Travel to NWC	
1130 - 1315	Lunch - OPEN	
1315 - 1430	The Inspector General	TIG LTG N. Thompson
1430 - 1445	Break	
1445 - 1600	The Judge Advocate General	TJAG MG Clausen
1600 - 1615	Break	
1615 - 1730	Anti-terrorism and Self-Protection (CAC - Terrorism Counteraction Office)	CAC Terrorism Counteraction office

ADDENDUM

(DeWitt Auditorium, NWC and Springfield Inn,
Fairfax I; Civilian attire)

TIME	SUBJECT	AGENCY/PRESENTER
0745 - 0830	Chief, National Guard Bureau	Chief, NGB LTG Walker
0830 - 0845	Break	
0845 - 0945	General Officer Trends in Evaluation Reports Briefing	MILPERCEN COL Miller
0945 - 1000	Break	
1000 - 1115	Army Materiel Command	CDR, AMC GEN Thompson
1115 - 1245	Lunch - OPEN Aerobics Clinic (Optional), Ft McNair Gymnasium	OTSG
1245 - 1345	Chief, Army Reserve	CAR MG Berkman
1345 - 1400	Break	
1400 - 1445	Remarks by the Chairman, Joint Chiefs of Staff	CJCS GEN Vessey
1445 - 1500	Break	
1500 - 1600	Remarks by the Vice Chief of Naval Operations	VCNO ADM Hays
1600 - 1615	Break	
1615 - 1715	Protocol and Service Etiquette	Protocol LTC Angle

ADDENDUM

FRIDAY, 2 NOVEMBER   (DeWitt Auditorium, NWC; Civilian attire)

TIME	SUBJECT	AGENCY/PRESENTER
0800 - 0900	Remarks by the Vice Chief of Staff, Air Force	VCSAF GEN Welch
0900 - 0915	Break	
0915 - 1015	US Army Recruiting Command	CDR, USAREC MG Bradshaw
1015 - 1030	Break	
1030 - 1145	US Army Training and Doctrine Command	CDR, TRADOC GEN Richardson
1145 - 1300	Lunch - OPEN	
1300 - 1415	US Army Forces Command	CDR, FORSCOM GEN Sennewald
1415 - 1430	Break	
1430 - 1515	Remarks by the Deputy Secretary of Defense	DEPSECDEF HON Taft
1515 - 1530	Break	
1530 - 1630	Deputy Chief of Staff for Logistics	DCSLOG LTG Register

TIME	SUBJECT	AGENCY/PRESENTER
MONDAY, 5 NOVEMBER	(Springfield Inn, Fairfax II & III and Springfield I & II & III; Civilian attire)	
0800 - 0900	Chief of Engineers	COE LTG Heiberg
0900 - 0915	Break	
0915 - 1045	Resource Management - Comptroller of the Army Perspective	COE LTG Noah
1045 - 1100	Break	
1100 - 1215	Resource Management - MACOM to Installation	TRADOC BG Gordon
1215 - 1345	Lunch - OPEN	
1345 - 1515	Financial Management - Rules and Regulations	USAFAC COL Richard
1515 - 1530	Break	
1530 - 1600	Installation Management	III Corps COL Hill
1600 - 1615	Break	
1615 - 1715	Financial Management - Case Study	USAFAC Moderators
1715 - 1730	Closing Remarks by the Comptroller of the Army	COA LTG Noah
1900 - 2200	Director of the Army Staff Dinner Ft McNair Officers Open Mess, Ballroom; Civilian attire	Protocol

ADDENDUM

<u>TUESDAY, 6 NOVEMBER</u>   (Ft Belvoir, Bldg 269, and Springfield Inn
                        Fairfax I; Civilian attire)

<u>TIME</u>	<u>SUBJECT</u>	AGENCY/PRESENTER
0730 - 1130	Installation Management Trip	CDR, Ft Belvoir MG Kem
1130 - 1150	Travel to Army-Navy Country Club	
1150 - 1315	AUSA Luncheon	Protocol
1315 - 1330	Travel to Springfield Inn	
1330 - 1415	OPMS Briefing	OPMS Study Group COL LeHardy
1415 - 1430	Break	
1430 - 1600	General Officer Management Office	GOMO LTC Riolo
1600 - 1615	Break	
1615 - 1700	Deputy Chief of Chaplains	Deputy CCH BG Forsberg

TIME	SUBJECT	AGENCY/PRESENTER

WEDNESDAY, 7 NOVEMBER (Pentagon Auditorium, 5A1070, and Springfield
Inn, Fairfax I; Army Greens)

TIME	SUBJECT	AGENCY/PRESENTER
0800 - 0845	Remarks by the Under Secretary of the Army	Under Secretary of the Army Mr. Ambrose
0845 - 0900	Break	
0900 - 1000	The Deputy Auditor General	The Auditor General Mr. Barbre
1000 - 1045	Sergeant Major of the Army	SMA SMA Morrell
1045 - 1100	Break	
1100 - 1145	Remarks by the Chief of Staff, Army	CSA GEN Wickham
1145 - 1200	Group Photo with the Chief of Staff (Pentagon Courtyard)	Protocol
1200 - 1220	Travel to Springfield Inn	
1220 - 1330	Lunch - OPEN	
1330 - 1400	Force Integration - Introduction	Director, Management Directorate BG Elam
1400 - 1445	CBRS	DAMO-FDQ COL Alcola
1445 - 1455	Break	
1455 - 1535	Threat Development	DAMI LTC O'Connor
1535 - 1545	Break	
1545 - 1645	Management of FI	DAMO-FDR LTC Jones
1645 - 1730	BOIP/QQPRI	DAMO-FDR Mr. Lucas
1900 - 2000	TOE/Living TOE	DAMO-FDF LTC Vaughan
2000 - 2010	Break	
2010 - 2030	Priorities	DAMO-ODR LTC Pitt
2030 - 2130	TAA	DAMO-FDF LTC DiFiorie

TIME	SUBJECT	AGENCY/PRESENTER
THURSDAY, 8 NOVEMBER	(Springfield Inn, Fairfax I; Civilian attire)	
0730 - 0800	FAS	DAMO-FDP
0800 - 0830	TAADS	DAMC-FDP MAJ Johnson
0830 - 0840	Break	
0840 - 0920	VFDMIS	MOPM LTC Holtry
0920 - 0930	Break	
0930 - 1020	SACS	DAMO-FDA MAJ Schackelton
1020 - 1030	Break	
1030 - 1115	AAO	DAMA-PPP Mr. Phoenix
1115 - 1200	Facilities Acquisition	DAEN-ZC Mr. Meyer
1200 - 1330	Lunch - OPEN	
1330 - 1420	LCSMM	DAMA-PPM LTC Cochrane
1420 - 1430	Break	
1430 - 1530	ILS	DALO-SML LTC Chadbourne
1530 - 1540	Break	
1540 - 1700	PPBS/PDIP	DACS-DPD LTC Oder
FRIDAY, 9 NOVEMBER	(Springfield Inn, Fairfax I; Civilian attire)	
0730 - 0815	Budget Development	DACA-BUF Mr. Bagby
0815 - 0825	Break	
0825 - 0940	Budget Execution	DACA-OMO MAJ Demetriou

TIME	SUBJECT	AGENCY/PRESENTER
0940 - 0950	Break	
0950 - 1050	CBS-X/TAEDP	DALO-SMD Mr. Kern Mr. Cunningham
1050 - 1100	Break	
1100 - 1130	DOCMOD	DAIM-DOCMOD
1130 - 1300	Lunch - OPEN	
1300 - 1630	Acquire, Train, and Distribute People	MAJ Miller/LTC Youman/MAJ Austin/ MAJ Dickson/Mr. Spruell/Mr. Dodge/ Mrs. Massey
1630 - 1700	Director of the Army Staff Wrap-up	Director, ARSTAF LTG Brown

Author: LTC Witherspoon
Team Chief: COL Rowe

Appendix 2 to Annex FF

General Officer Continuing Education

1. PURPOSE. This appendix reviews the current General Officer Continuing Education program and recommends changes to that program.

2. DISCUSSION.

a. The 1978 Review of Education and Training of Officers (RETO) identified a number of shortcomings in the Army's system of professional development for general officers. RETO went on to analyze key characteristics of a senior executive development philosophy and to propose a continuing education program consisting of three components:

(1) Inter-assignment Transitions— preparation in specific skills and knowledge required by generals to function effectively from the outset in their next assignment.

(2) Executive Development Courses— education and training in areas of general relevance to a range of executive responsibilities and general officer positions.

(3) Orientational Updates—information on current Army policies, programs, plans and problems considered by the Army leadership to be of high priority.

b. This trilogy remains a useful framework both for defining the purposes and evaluating the effectiveness of the General Officer Continuing Education Program. The General Officer Management Office (GOMO) uses it as the basis for programming general officer education and training (See Tab A, General Officer Continuing Education Program).

c. Inter-assignment Transition.

(1) Transition Needs.

(a) The more senior an officer becomes the earlier he is expected to set the agenda for his organization. General officers in particular must report to each assignment prepared from the outset to execute their responsibilities with confidence and competence. Although they will "grow" in the job, too much hinges on their decisions and actions for them to begin work facing a long learning curve to understand basic job scope, requirements and priorities.

(b) General officer positions vary significantly in the technical knowledge required for success. Hence experience at one position rarely will suffice as preparation for the next. Furthermore, the rate of change of technology and doctrine is great. Even officers qualified earlier in their careers as "experts" in a field need a period of refresher training prior to assuming more senior roles within their areas of expertise.

(2) Current Inter-assignment Transitioning: Approximately 60 general officers per year participate in the tailored inter-assignment training program managed by GOMO. This represents less than 40 percent of total general officer reassignments. Some general officers transfer within theaters and arrange their own transition programs; others move between positions involving similar responsibilities. Nonetheless, there is a significant shortfall in the number of generals who ought to receive at least some transitional development prior to assuming their new duties.

(3) Policy Recommendation: Each general officer has to assume responsibility for determining his own transition needs based on opportunities recommended by DA and, of critical importance, consultation with his prospective boss. Discussion with his predecessor while still incumbent in the job will also help determine the transition program. Inevitably, there will be an underlap in assignments which DA must accept as a necessary price to pay for the Army's senior leadership development. DA should increase inter-assignment program participation from 60 to 100 per year.

Expand inter-assignment training and education programs and provide each general officer the opportunity to interact with his future superior in preparing for his next assignment.

d. Executive Development Courses.

(1) Executive Development Needs.

(a) Generals shape organizations and at senior levels shape the environments in which the Army exists. A large part of their contribution to the Army lies in developing its structure, reinforcing its ethic, motivating its personnel and employing its resources. Performance of these senior executive functions by general officers is indispensable to the Army.

(b) At the same time, these executive talents are difficult to instill in an officer, dependent as they largely are on innate cognitive abilities. Here prior development and the Army's selection system must fulfill the need to promote high quality leaders. The role of developmental courses will be to draw out and orient these talented leaders so they may realize their full potential as corporate directors of the Army.

(2) Current Executive Development Programs:

(a) GOMO presently oversees an extensive program of executive level courses (see Tab A) at civilian universities and institutes as well as DOD and Army schools. These courses vary in duration from several days to several months. In addition to executive skills, they focus on national security policy, systems management and theater operations.

(b) Today's program benefits from initiatives taken by GOMO to find appropriate short courses and recommend general officer participation. Other agencies have also innovated developmental programs, e.g., USAWC's Professional Development Conference and the Joint Senior Tactical Battle Managers Course. These efforts reflect a growing recognition by general officers that continuing development programs are essential both for deepening expertise and building a reservoir of executive talent.

(c) Three limitations constrain general officer executive development. One is the lingering perception, already addressed, that general officer time is too valuable to spend on education and training. Only repeated guidance from the top will revise this attitude. Second, GOMO requires some increase in personnel if general officer programs are to be expanded. This is the minimal option for the new executive development organization recommended in Appendix 4. Third, there needs to be a better link between general officer position requirements, develop-ment goals and officer characteristics. A senior level assessment program could provide such a link. The Senior Leadership Coordinating Committee will develop specific recommendations for such a program within the year.

(3) Policy Recommendations: The current executive development program should formally incorporate three elements for which a significant need exists:

(a) A public affairs course that goes beyond the half-day Senior Communicators Workshop run by the DA Office of the Chief of Public Affairs.

(b) A spectrum of information management courses to give generals understanding and control over ADP resources and advanced techniques in artifical intelligence and expert systems.

(c) A professional library which provides each general officer with reading and other developmental materials.

Overall general officer participation in civilian university developmental courses should increase from 20 to 40 per year. Expanded participation rates in military programs should be as determined by GOMO.

Increase general officer participation in short broadening courses in civilian and military institutions to enhance general executive capacity or functional expertise.

.. Develop a public affairs course tailored to general officer needs.

.. Develop information management courses for general officers which prepare them, according to experience and need, to use, manage and assess computer systems applications in military organizations.

.. Develop a program that draws on the resources of DA, USMA, USAWC and TRADOC to produce, in annual installments, a personal library of professional readings and other materials for general officers.

e. Joint and Combined Training and Education.

(1) Needs: As the table below indicates, the domain of responsibilities for most general officers extends to the Joint and Combined arenas.

GO Rank	Positions With Some Joint or Combined Responsibilities
BG	35%
MG	55%
LTG	70%
GEN	100%

Table FF-2-1: General Officer Positions With Joint or Combined Responsibilities.

The trend reflected in AIRLAND BATTLE doctrine and concepts for ARMY 21, is toward even greater integration of Army operations with those of sister services and US allies. Yet, notwithstanding the congressional mandate that makes at least one joint assignment a prerequisite for promotion to brigadier general, the majority of officers bring little joint or combined experience to the general officer grades.

(2) Current Joint Training and Education: The adoption of AIRLAND BATTLE doctrine has inspired and improved joint training activities. The previous section mentioned the Joint Senior Tactical Battle Managers Course which runs for three days and included 16 general officers among the 32 Army participants in 1984. Exercises and simulations accomplish joint operational training objectives more effectively than schools, and general officers have increased their joint participation in them in recent years. USAREUR's Warrior Preparation Center is an excellent forum for testing and practice of joint and combined operational doctrine in realistic decision environments at corps level and echelons above corps.

(3) Recommended Policy: Absent in the joint schooling system until 1983 was a course for general officers. In that year the National Defense University conducted the first CAPSTONE Course. CAPSTONE's mission is

... to provide select general and flag officers with a better understanding of the key elements influencing *Joint and Combined operations.*

The graduates of the first three Capstone classes judge it a success. However, the Joint Chiefs have agreed only to one course per year. With Army participation set at seven per course, the JCS decision leaves the Army, as well as the other services, short of the mark as far as senior Joint training is concerned.

Seek JCS approval for an increase in frequency of the CAPSTONE course to twice per year (Army participation at seven brigadier generals per course).

f. Supporting Policy Recommendations.

(1) To supplement formal inter-assignment training and developmental education, DA should sustain an aggressive orientational update program for general officers to keep them abreast of Army policy and key defense issues.

Maintain a continuing program of Army and DOD seminars. Tailored courses and update briefings for general officers.

(2) For any of the three developmental programs to have full effect, officers must know well in advance what each future assignment will be. Although circumstances occasionally dictate "short-fuse" decisions, the goal should be to alert officers several months in advance of impending reassignments.

Revise general officer assignment procedures to facilitate timely participation of general officers in professional development programs.

TAB A General Officer Continuing Education Program.

1 NOV 1984

General Officer Continuing Education Program

The General Officer Continuing Education Program consists of three major areas:

- ° Individual Executive Development

- ° Inter-Assignment Orientation and Training

- ° Periodic Information Update

To the maximum extent possible, general officers are encouraged to use this educational program for professional refresher training and personal preparation for their new duties.

The Individual Executive Development Programs are conducted at major colleges and universities. General officer participation is limited to school quotas for each program. Listed below are the major civilian colleges/universities, military institutions, and programs offered:

- ° Harvard University

  - °° National and International Security   (2 wks)
  - °° Senior Managers in Government   (3 wks)
  - °° Senior Executive Fellows   (3 months)

- ° University of Michigan

  - °° Advanced Human Resource Management   (2 wks)

- ° Columbia University

  - °° Marketing Management   (1 wk)

- ° Center for Creative Leadership

  - °° Leadership Development   (1 wk)

- ° Brookings Institute

  - °° Government Executive Training   (1-2 wks)

- ° Aspen Institute

  - °° Humanistic Studies (Justice and Society Seminar)   (2 wks)

- ° Pennsylvania State University

  - °° Management of Managers   (2 wks)

SUBJECT: General Officer Continuing Education Program

- Defense Systems Management College

  - Systems Acquisition Management Course   (3 1/2 days)

- Defense Institute of Security Assistance Management

  - Executive Security Assistance Management   (1 wk)

- National Defense University

  - Capstone Pilot Course   (7 wks)

- Defense Language Institute

  - Language Training   (2 wks-up)

Participation in the Major Educational Programs

Title of Course	Year						A/O 1 Nov
	1978	1979	1980	1981	1982	1983	1984
National & International Security	1	6	9	13	14	15	10
Senior Managers in Government	5	4	2	2	5	6	8
Systems Acquisition Management	-	10	5	13	13	19	25
Leadership Development	2	20	17	16	5	3	15
NDU Capstone Pilot Course	-	-	-	-	7	7	7
AWC Professional Development	-	-	-	-	-	-	24

The Inter-Assignment Orientation and Training is tailored to the individual general officer's next assignment. The general officer is consulted on the training which is available and any special training he may desire. Listed below is a typical Inter-Assignment Training Program for a division commander with community responsibilities. Since Jan 82 a total of 122 have participated in this type of preparation and training.

- General Officer Legal Orientation Course   (2 days)

- Pre-command Course   (4-5 days)

  - Ft Leavenworth
  - Ft Benning
  - Ft Knox

- Army Installation Management Course   (1-2 days)

- Training Support Center   (1 day)

- National Security Agency   (1 day)

- National Training Center   (1 day)

- DA Orientation Training/Briefing   (1-3 days)

SUBJECT: General Officer Continuing Education Program

oo CSA precommand interview (mandatory for CG's of
Corps, Divisions, and TRADOC Installations)

oo ODCSOPS Briefing (mandatory for Division CG's)

oo OCLL (mandatory for CONUS Installation CG's)

oo ODCSPER Briefing

a. MILPERCEN

b. TAGCEN

oo ODCSLOG

oo COA

oo OTIG

oo OACSI

oo OCPA

oo OTJAG

oo CIDC

oo NGB

oo OCAR

General officers are provided Periodic Information Updates by way of:

o Major Command-sponsored Workshops

o Brigadier General's Conferences

o Weekly Summary Articles

The General Officer Continuing Education Program is not limited to those
institutions or organizations listed above. This office continues to identify
executive development courses which would benefit general officers.

A. R. RIOLO
Lieutenant Colonel, GS
Chief, General Officer
Management Office

INTER-ASSIGNMENT UPDATING AND ORIENTATIO.' PROGRAM OPTIONS

General Officer Legal Orientation, TJAG School	1-3 days
Army Installation Management Course, Ft Lee	1-2 days
Army Training Support Center, Ft Eustis	1 day
Pre-Command Course Ft Benning, Ft Knox, Ft Sill and Ft Leavenwoth	2-5 days
Office Call with Chief of Staff, Army	1/2 hour
HQDA Briefings/Orientations ODCSOPS, ODCSLOG, ODCSPER, IG, PA, and COA	1-3 days
Congressional Visits	1-2 days
National Security Agency Briefing	1 day
Security Assistance-Executive Program, DISAM	5 days
USA Security Assistance Center, AMC	1 day
Security Assistance Accounting Center, Lowry AFB	1 day
CIA/DIA Briefings	1-2 days
Language Training	4-6 weeks
OJCS/State Department Briefings	1-2 days
AUSA Briefing	1-2 hours

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Appendix 3 to Annex FF

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RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
S31 Develop a formal BG transition program that provides the newly selected brigadier general an appreciation of: himself, generalship and his future role, the Army and its major undertakings; national strategy, strategic planning and long-range policy implications; operational and tactical doctrine in joint and combined contexts; and the requirements of his first assignment. Recommended modules: oo Five day executive self-development course. oo Five day land warfare/doctrine exercise oo Two day futures policy impact exercise. oo Five to seven day revised conference with increased "generalship". oo Unit fitness management seminar. oo Tailored assignment preparation.	a. Select and contract best self-development course(s).	ODCSPER	3d Qtr FY85	
	b. Select site and develop land warfare exercise and associated doctrinal workshop.	ODCSOPS	3d Qtr FY86	
	c. Reduce current conference to one week with increased focus on generalship.	ODCSPER	3d Qtr FY86	
	d. Have AWC - Strategic Studies Institute conduct policy impact exercise.	AWC	Annually	
	e. Have Soldier Physical Fitness School develop a Physical Fitness Management Seminar.	Soldier Support Institute	3d Qtr FY85	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
S32 Consolidate responsibility for all general officer professional development programs (including the BG transition program) under GOMO. Ultimately, transfer responsibility for general officer professional development programs to an executive development organization, as determined by the Senior Leadership Coordinating Committee.	a. Complete preparation of leadership doctrine.	USACAL(P), ARI	4th Qtr FY85	
	b. Conduct studies of GO executive skill requirements and position requirements.	ODCSPER(P), SLCC Working Group	4th Qtr FY85	
	c. Develop executive assessment instruments.	ODCSPER(P), SLCC Working Group	1st Qtr FY86	
	d. Determine requirements and responsibilities for an executive development organization.	ODCSPER(P), SLCC Working Group	3d Qtr FY86	
	e. Transfer GO professional development to new executive development organization (Options range from expanded GOMO to new office responsible for GO assessment and education.).	ODCSPER(P), SLCC Working Group	3d Qtr FY88	
S33 Expand inter-assignment training and education programs and provide each general officer the opportunity to interact with his future superior in preparing for his next assignment.		ODCSPER(P), ODCSOPS, USAWC, TRADOC, MACOM's	3d Qtr FY86	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
S34 Increase general officer participation in short broadening courses in civilian and military institutions to enhance general executive capacity or functional expertise.	a. Increase GO participation in university executive level programs.	ODCSPER	4th Qtr FY86	
oo Develop a Public Affairs Course tailored to general officer needs.	b. Develop GO public affairs course.	OCPA	3d Qtr FY86	
oo Develop information management courses for general officers which prepare them, according to experience and need, to use, manage and assess computer systems applications in military organizations.	c. Develop GO information management courses.	ODCSPER(P), ODCSOPS, USAWC, TRADOC, USMA	3d Qtr FY86	
oo Develop a program that draws on the resources of DA, USMA, USAWC and TRADOC to produce, in annual installments, a personal library of professional readings and other material for general officers.	d. Develop GO library.	ODCSOPS	3d Qtr FY 86	
S35 Maintain a continuing program of Army and DOD seminars, tailored courses and update briefings for general officers.		ODCSPER(P), DA Staff	Ongoing	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
S36 Seek JCS approval for an increase in frequency of the Capstone course to twice per year (Army participation at 7 BG's per course).	Request JCS approval.	ODCSOPS	3d Qtr FY86	
S37 Revise general officer assignment procedures to facilitate timely participation of general officers in professional development programs.	a. Establish procedures that permit announcement of GO assignments 3-4 months in advance of assumption of duties.	ODCSPER	3d Qtr FY86	
	b. Integrate validated assessment instruments into assignment process.	ODCSPER	3d Qtr FY88	

NOTES:

PHASING PLAN

GENERAL OFFICER DEVELOPMENT PERIODS.

S31

o CONSOLIDATE GO DEVELOPMENT WITHIN AN EXECUTIVE DEVELOPMENT ORGANIZATION.

o FORMAL EXPANDED BG TRANSITION PROGRAM.

o FORMAL LTG TRANSITION PROGRAM.

o DOUBLE CAPSTONE FREQUENCY.

PUBLIC AFFAIRS AND
o INFORMATION MANAGEMENT COURSES.

o INCREASED PARTICIPATION IN INTER-ASSIGNMENT AND EXECUTIVE DEVELOPMENT PROGRAMS.

Diagram elements (timeline FY85–FY96):
- EXECUTIVE DEVELOPMENT STUDY
- PHASE IN EXECUTIVE DEVELOPMENT ORGANIZATION
- G.O. PD TO GOMO
- G.O. PD TO GOMO: GO LIBRARY; BG/LTG TRANSITION; GO CAPSTONE; PUBLIC AFFAIRS/INFORMATION MANAGEMENT; INTER-ASSIGNMENT

RESOURCES

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY		7	8	8	8	8	8	8	8	8	8	8
STAFF AND FACULTY—MIL/CIV		3/0	3/1	3/2	2/4	2/4	2/4	2/4	2/4	2/4	2/4	2/4
TDA CHANGE—$ MILLIONS		1.0	1.2	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3

Author: LTC Witherspoon
Team Chief: COL Rowe

Annex GG

Development Period: Senior General Officers

1. PURPOSE. This annex outlines the requirements and development of senior general officers (lieutentant generals and generals).

2. DISCUSSION.

a. Background:

(1) Lieutenant generals and generals constitute the senior corporate directorship of the Army. The decisions made by these 60 officers affect every sphere of Army activity. Their judgment about what is important to the Army plays a determinant role in its future.

(2) Senior generals identify the transition to lieutenant general as crucial not only for the broadened scope of authority and responsibility but for the distinct change in the nature of decision-making at the higher grade. Their environment differs from that of the major general in the degree of complexity surrounding the issues they must handle as well as in the need to project further into the future to anticipate Army needs.

b. What the Senior General Must BE-KNOW-DO:

(1) Senior generals speak for the Army to the public, Congress, other services and often other nations. They represent the highest standards of officership and the profession of arms. American society has confidence in its armed forces to the extent its leadership projects that confidence and exercises sound judgment, particularly in response to crisis.

(2) Senior generals must possess an understanding of the state of the Army-wide readiness, esprit and discipline. They assess how their decisions will affect the organization, its soldiers, its civilian employees and Army families. As custodians of the Army's future, senior generals devote substantial resources and time to ensuring that the Army's personnel management and professional development systems produce first rate leadership.

(3) Lieutenant generals and generals rely on the art of persuasion far more than at earlier stages of their careers. Only rarely do they directly command organizations. Instead they must know how to mobilize a consensus of peers and understanding of priorities by subordinate echelons. Persuasive skill is indispensable in joint and civil-military relations.

(4) Senior general officers shape national strategy. They must understand the various threats to national security in global and regional contexts and how to integrate joint and combined forces to defeat such threats. They must also develop a concept of future warfare and apply resources to prepare for it. At the most senior levels, general officers contribute directly to the national security policy-making process. Hence they must possess a broad synthesis of knowledge of politico-military affairs, technology, economics and history to fill the role of soldier-statesman.

c. The Environment of Senior Generals:

(1) DOPMA limits the number of senior generals (O-9, O-10) to 15 percent of the total authorized general officer strength. Promotions, therefore, occur irregularly to fill specific vacancies. About 25 percent of the Army's major generals attain a third star. By this point the civil administration exercises greater scrutiny over the selection process. Senior generals serve at the discretion of the Secretary of the Army and the Army Chief of Staff. About one in four will advance to the rank of general.

(2) Lieutenant generals command corps, support commands, certain overseas commands, CONUS armies and other special commands; serve as deputy commanders or chiefs of staff at MACOMs or principal and special staff officers at DA; and hold a variety of other posts in OSD, DOD, NATO and Army educational institutions. Assignment distribution is 25 percent overseas, 30 percent in CONUS commands, 25 percent at DA and 20 percent in DOD, JCS or other special

activities. Four star generals, beside the CSA and VCSA, normally command major combined, unified or Army commands or combinations thereof. Four of these commands (and one inter-service rotational NATO post) are overseas, the remainder (currently eight) serve in CONUS.

(3) While all senior generals act in integrative capacities, one third of the lieutenant general positions require specific functional backgrounds in such areas as logistics, communications, computer systems and intelligence. Some 70 percent of lieutenant general positions and all full general positions encompass joint or combined responsibilities.

(4) No formal transitional development program exists for lieutenant generals or generals. They participate to a limited extent in the continuing education programs available to brigadier and major generals. They direct and participate in development seminars and exercises within their own commands. Inter-assignment training and education take the form of command and staff briefings, orientation visits and preparation programs negotiated on an individual basis with Army schools and GOMO.

d. Roles in the Development of Senior Generals:

(1) The roles assumed by individuals, mentors, organizations and schools are, for the most part, the same for senior generals as they are for brigadier and major generals. At the senior grades, however, officers must rely more on their own assessment of personal development needs. They must program time in their schedules to break away for reflection, such as attending senior executive management courses which serve to stimulate new patterns of thinking or different approaches to organizational challenges.

(2) Much of what generals learn will come from the networks of personal interaction they establish and cultivate. They can expect Army schools to be responsive to their requirements for individual and organizational training and information. However, at this level the general, even from the field, influences the school system as much or more than he draws from it.

e. Methods to Emphasize:

(1) Senior general development occurs largely through interactive communications with peers, superiors, civilians and colleagues in allied services and nations. Professional reading programs, which should become more eclectic, extend personal insight and innovation. A general's command priorities and operational style by themselves translate into developmental challenges for subordinates, and it is therefore essential to conduct periodic conferences, seminars and exercises to establish a healthy command climate.

(2) Schools and the Army leadership provide continuous orientational updates to senior generals. Schools also promote dialogues on evolving Army doctrine and meet individual training needs.

f. The professional development aim at this level is a program for continued education and training of senior general officers.

g. The major thrust of this development period is to create a formal program for executive development of lieutenant generals and generals.

3. **Recommendations:** The base policy for this development period is: Upon selection to lieutenant general and between assignments thereafter, senior general officers will be provided opportunities for executive development and individualized assignment preparation of about four to eight weeks.

4. **CSA Remarks:** The Chief of Staff conceptually approved the base policy.

Appendix
1-A Senior Generals' Development Program
2-Action Plan

Author: LTC Witherspoon
Team Chief: COL Rowe

Appendix 1 to Annex GG

A Senior Generals' Program

In two respects, the current general officer continuing education system does not fully meet the development needs of lieutenant generals and generals as identified by the PDOS general officer survey and other studies. First, there is no formal transition program to assist the new lieutenant general in his entry into an expanded frame of reference. The assumption that the officer would not have survived the selection process without "having everything he needs" is fallacious, according to many generals themselves. Second, senior generals participate too infrequently in continuing education programs. More than any other group of officers, they need occasional periods away from the job to reappraise past experience and apply new thought to their responsibilities.

Develop a formal transition program and follow-on short seminars/courses that provides the senior general an understanding of his roles as public spokesman and representative of the Army; an understanding of his responsibilities for the Army's overall mission readiness and moral fiber; executive development training; a review of national strategy, Defense policies and Army programs; and specific preparation for each subsequent assignment.

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
S51 Develop a formal LTG transition program and follow-on short seminars/courses that provide the senior general an understanding of his roles as public spokesman and representative of the Army; an understanding of his responsibilities for the Army's overall mission readiness and moral fiber; executive development training; a review of national strategy, defense policies and Army programs; and specific preparation, for each subsequent assignment.	a. Develop data based on 0-9 and 0-10 skill and position requirements. b. Develop general and position-specific education and training programs.	ODCSPER(P), SLCC Working Group ODCSPER(P), ODCSOPS	4th Qtr FY85 1st Qtr FY86	

NOTES:

Authors: COL Dollar/LTC Carter

Annex HH

Reserve Components

1. PURPOSE. To depict the Reserve Component (RC) officer education and training environment, portray the PDOS recommended changes to the RC professional development system and provide rationale for those recommendations.

2. DISCUSSION.

a. Background.

(1) Based on the mission to examine the officer professional development system from a "Total Army" perspective and make recommendations for a system to last for the next 40 years (1985-2025), PDOS examined both the current system as it applies to the Reserve Components and the emerging thrusts of the study pertaining to Active Component officers in order to determine the desired system for RC officers. One thing that became readily apparent is that even though we are a "Total Army", the Reserve Components are a unique portion of that army. They have unique constraints, needs, requirements and in some instances, organizations. All these things must be recognized, understood and considered in the application of a profesional development system. While it would be nice or maybe even ideal to have officers receive the same education and training regardless of component, when one examines the differences in peacetime assignments, and the potential for mobilization requirements, it becomes apparent that RC officers can be adequately prepared for their "go to war" mission with only portions of the educational courses required by the AC officer.

(2) The system portrayed as the desired system for RC officers is actually a *minimum level* of education. Because most officers will avail themselves of additional education and training, all educational courses in the Army system should be made available to the Reserve Components to the extent required and in as many modes or options as possible. In the Reserve Components, time available for devotion to military duties, training and education varys greatly from officer to officer. The dichotomy of the situation comes from the fact that time seems to be most precious for officers possessing the best abilities and potentials. This is a natural phenomenon because those same people tend to rise to higher positions of responsibility and trust within their civilian occupation. Because of this, many times when a decision is made dictating that the only accepted method of obtaining certain skills is through attendance at a resident course, the officer with the most natural ability and potential is forced to leave the system and an officer with lesser atributes takes his or her place solely because of more available time. Therefore, decisions to eliminate alternatives for qualification given in non-resident modes must be carefully evaluated for long term implications.

(3) The proposals of this study affecting Reserve Component officer professional development are based on careful analysis of needs of the officers and the system (to include timeliness of education received) and with complete recognition of the time demanded of the RC officer.

b. Environment.

(1) The environment in which the Reserve Component officer operates is very unique. The officer epitomizes the concept of the citizen soldier. He is a member of the civilian community and yet periodically changes into his military uniform for brief periods of active duty throughout the year. He is a civilian, a family man and an employee in the civilian arena yet he as a citizen soldier must be professionally qualified and ready to mobilize at a moment's notice. The Reserve Component officer must therefore simultaneously refine civilian and military skills. Because of this unique and demanding position within the American society, the Reserve Component officer must use wisely his most treasured possession, his time. It is therefore necessary that the U. S. Army system for officer professional development take into consideration the Reserve Component officer's limited available time and ensure that the design of the professional development system takes full advantage of this limited commodity.

(2) Reserve Component officers are located in virtually every city and community within the United States and its protectorates as well as abroad. Currently there are more than 4500 Reserve Component units in over 4000 communities. The Reserve Component officer population is in excess of 140,000.

(3) Within the Reserve Component there is no centralized officer personnel management system as there is within the Active Component. There are actually three subsets of the Reserve Components, all with somewhat different characteristics. They are: The US Army Reserve (USAR) troop program units (whose officers are managed primarily by Major United States Army Reserve Commands (MUSARCS)); the Individual Ready Reserve (IRR), whose officers are centrally managed by the Army Reserve Personnel Center (ARPERCEN) and who only receive military experience through schools they attend or occasional annual training periods; and the Army National Guard (ARNG) (whose officers are managed primarily by the Adjutants General of the 54 states and territories). In the case of the ARNG and USAR TPU's, geographic constraints play an extremely important role in development and assignment of officers. The spectrum of potential assignments is very narrow and if either the local organization is changed by reorganization or an officer moves, he will in many instances, be required to requalify in branch and/or specialty. The same is true for officers holding "one of a kind" specialties or branches within an organization (such as a chemical officer in an armor unit). Because of unit reorganization/activation/deactivation and the civilian employment changes, the average RC officer will have to change his primary military speciality at least once, if not twice during his career. The accomplishment of these changes are generally affected at the expense of ones most limited possession, time. The fact that availability of units within a specific area tends to drive the career path of the RC officer does create some problems. However, it also creates strength. This strength comes in the detailed knowledge of the organization, cross training in many different positions within the organization and good team building because of the long term personal relationships developed through assignment stability. Most RC officers are, in fact, multi-tracked, but not by design.

(4) The end of the Selective Service System in the early 1970s, the advocation of a national policy of reliance on the Reserve Component for any future contingency, and the philosophy that future conflict will require a "come as you are" army, dicate that the Reserve Component Officer Corp be motivated, well-educated and highly trained. The Officer Professional Development System must insure that the RC officer is taught the right things, at the right time in his career, in the right places and with maximum effectiveness. Because the military education of the RC officer is accomplished for the most part in a non-pay status through either correspondence courses or the non-resident phase of the USAR School program, the linking of the completion of military education to promotion has been utilized as a means of insuring that mandatory military education is completed. Over time with the changes in mission/purpose of the Officer Basic/Advanced courses and the CGSOC as well as the addition of the Combined Arms and Service Staff School (CAS3) and the pre-command courses, the current mandatory education courses required of the RC officer no longer provide the officer with adequate professional development.

(5) The completion of military education and training is difficult for the reserve component officer primarily because of the time required to complete the schooling and training plus conflicts with civilian occupation. This problem is however recognized and the RC officer is generally given a series of options for accomplishing the required schooling and training. The options are as follows:

(a) Programs of non-resident instruction.

(b) Programs of extended resident instruction.

(c) Resident/non-resident combination programs.

These options are granted equal credit within the officer professional development process and each completed course is culminated with a course completion diploma. The successful completion of selected military schooling is mandatory for the RC officer and as such is a key feature in the various officer personnel management systems of the Reserve Component. Without these options very few RC officers could pursue a career in the Reserve Components.

(6) Based on the constraints or problems identified, it seems logical that the development of a complete, requirements dr￼ . education system for RC officers requires at least as much attention, analysis and resourcing as it takes to develop a system for AC officers. However, up to this point in time, development of RC courses has been pretty much an afterthought or adaptation of AC courses to supposedly meet the needs of the RC. This approach has not been necessari-

ly unsuccessful because we really are basically "one army" and the adaptation has been acccomplished with some good rational thought processes. However, if we are really serious about providing the "best possible system" for the RC, development must be based on a front end analysis of needs and alternatives required. All systems, AC and RC must be developed and r :naged on an integrated basis with equal priorities. Changes to one will almost always impact on the other and therefore cannot be made in isolation. An example of a current course developed without adequate RC consideration is the CGSOC (RC). The current course is phase I of the AC course and while it is a good course, it is based primarily on how best the RC officer can be integrated into and extracted from the AC course. As currently configured, the RC course does not offer the "Battle Simulation Exercises" which take place immediately following phase I. These exercises tend to be the "wrap up" or reinforcement of skills developed in Phase I and therefore, the RC officer misses a very critical portion of the course that could probably be included in the RC course by eliminating or condensing other subjects.

c. Current System:

(1) RC officers are accessed from the following programs:

(a) Reserve Officers Training Corps—(ROTC) Approximately 90% of the 2d LT requirements of the USAR and 50% of the ARNG's requirements are fulfilled through this program.

(b) Officer Candidate School (OCS)—The branch immaterial OCS at Ft Benning allocates space quotas to both Reserve Components for each class but only a very limited number of officers are accessed in this manner.

(c) Army National Guard OCS—(ARNG-OCS) This program is a direct input system designed and operated specifically for Reserve Components. There arc programs in 52 states and territories that serve both the ARNG and USAR. Approximately 25 percent of the ARNG's 2d LT requirements and less than five percent of the USAR's are filled from this program.

(d) Direct Commissioning Program—This program allows personnel possessing certain professional qualifications to be given direct commissions in the Reserve Components, primarily in the Medical Corps. Judge Advocate General's Corps and the Chaplain Corps.

(2) Accession standards—Current programs initiated by the ARNG are bringing the commissioning standards in line for all components. The specifics of the program require graduates of the State OCS courses to have a minimum of 10 semester hours of college beginning with the 1983-84 class. Ten semester hours are added to the requirement each year through the 1988-89 class when the total requirement reaches 60 semester hours. From that time on applicants will be required to have at least 60 semester hours before entering OCS.

(3) Officer Basic Courses (OBC)— Completion of OBC has historically been the educational requirement for promotion to First Lieutenant and also qualifed the officer for promotion to Captain. Current options available to RC officers are:

(a) Branch basic courses (Resident) (Approximately 19 weeks).

(b) Officer Basic Course Reserve Component (OBC-RC)—This course is composed of three phases; a preparatory correspondent component, an 8-week resident course, and a post-residence correspondence package. The course is to be on line by 30 May 85 in IN, FA, AR, EN and SC. It is to be implemented in MP, MI, AG, OD, CM, TC and QM by 30 May 87.

(4) Officer Advance Course (OAC)— Educational requirements for promotion to grade of Major are met by completing one of the following advance courses:

(a) Branch Advance Courses (20 weeks).

(b) Officer Advance Course— Reserve Components (OAC-RC) 12 weeks at the IN, AR, FA, or SC school and 15 weeks at the EN school.

(c) Officer Advance Course (OAC)— USAR school course.

(d) Officer Advance Nonresident courses.

(5) Combined Arms and Services Staff School (CAS3)—Currently this course does not play a significant part in RC officer professional development; because it is offered in resident mode only and thus far has not been tied to promotion or retention. One exception is that the ARNG has made attendance of CAS³ mandatory for Active Duty Guard/Reserve (AGR) officers who had not completed or enrolled in CGSOC prior to 1 May 84.

(6) Command and General Staff Officers Course (CGSOC)—This is the Reserve Component officers last formal educational promotion gate. Under current regulations, completion of

one half of CGSOC meets the requirement for promotion to LTC and completion of the course is required for promotion to COL. Available options are:

(a) Resident course (42 weeks).

(b) RC Resident Course (approximately 18 weeks).

(c) USAR school (six phases with three two-week ADT periods).

(d) Nonresident Instruction (NRI) (22 subcourses totaling 491 credit hours).

(7) Senior Service College (SSC)—This education level is not mandatory for RC officers and therefore is not tied to retention or promotion. Attendance is restricted based on limited quotas available at each of the schools. Each component convenes a board to select individuals for all SSC courses to include the Corresponding Studies Course of the US Army War College. Attendance is restricted to Colonels and Lieutenant Colonels. SSC programs and annual RC quotas for each are:

(a) US Army War College (USAWC)— ARNG, 10 and USAR, 10.

(b) USAWC Corresponding Studies Program (USAWCCSC); A resident/nonresident program conducted over a 2-year period— ARNG, 50 and USAR, 88.

(c) National Defense University (NDU).

1 National War College (NWC)—ARNG, one and USAR, one.

2 Industrial College of the Armed Forces (ICAF)—ARNG, one and USAR, one.

(d) Air War College (AWC)—ARNG, one and USAR, none.

(e) Naval War College (NAWC)—ARNG, one and USAR, one.

(f) Inter-American Defense College (IADC)— Determined each year.

d. PDOS system implications:

(1) Aims:

(a) Align RC officer professional development with the active system consistent with Guard/Reserve constraints and requirements.

(b) Realign the system to require educational courses at a time they can be most beneficial in career development.

(c) Ensure that full time support officers of the Reserve Components are receiving the same developmental experiences as Active Component officers so that they can be expert mentors and trainers.

(d) Stress development of assessment tools and modular courses designed to meet additional skill or proficiency requirements and thus partially alleviate the burden of multiple branch/speciality changes.

(e) Ensure that educational modes (primarily NRI) normally used by RC officers are developed concurrently with resident modes and are kept current.

(f) Stress development and use of "State of the Art" communication concepts to assist in providing education and training to RC officers at home station to alleviate the requirements for the officer to attend numerous periods of resident instruction.

(g) Encourage further examination of the following areas:

1 Determination of how much time average RC officer can be expected to devote to military endeavors (both unit and professional development) before service in the RC becomes an impossible burden and the point of diminishing return is reached.

2 Further evaluation of the feasibility of providing appropriate compensation for RC officers pursuing development through non-resident programs.

e. PDOS rationale:

(1) Analysis indicates that two basic weaknesses in the current system are:

(a) Inappropriate timing of required education.

1 OBC—Recent actions taken to require OBC within the first 18 months after commissioning were deemed appropriate by the study group and therefore no further recommendations are made in this area.

2 OAC—Actions are underway to implement recommendations of the DA Action Plan for RC Training which calls for completion of OAC within three years after promotion to Captain. PDOS also determined that this change is a necessity if we are to insure that RC officers receive that educational experience when it is needed. PDOS determined that no action is required other than to support implementation of the OAC recommendation contained in the DA Action Plan.

(b) Lack of adequate options for RC staff officer development.

1 With the advent of CAS3 and its inherent requirement for resident training, the RC officer (other than Full-Time Support personnel) who cannot commit nine weeks to a resident staff course faces a large deficiency in the means to develop skills necessary to perform as a battalion or brigade staff officer. While it is commonly recognized that CAS3 cannot be conducted in a strictly correspondence mode, the basic skills provided in that course are what the mid level RC officer needs most. Therefore, it seems quite apparent that a course to teach basic staff skills to RC officers primarily by *corresponding studies* type instruction must be developed. Even though some of the proficiencies developed by CAS3 (i.e. socialization and teamwork at problem solving) will develop to a lesser degree in a substitute course, the course can, if properly designed, meet the educational requirements of the RC officer. To be as effective as possible, automation of the NRI portion of the course must be avoided. All student input should be in the form of individual written products (i.e. staff studies, staff estimates, fact sheets, OPLANS, OPORDs, etc.). These written products should be individually "hand graded" with detailed feed back to the student. There should also be a "telephone mentor" relationship established. A short resident phase (2 weeks) would provide for some combined arms flavor, opportunity for development of briefing skills, and a brief socialization experience. Anything more than 2 weeks in residence will tend to make the course unattainable for many RC officers and therefore such an option must be avoided. It must be remembered that for many RC officers, the only opportunity to train with troops in a field environment occurs during the 15 days of Annual Training (AT) each year. If the officer attends a resident course in lieu of AT, a valuable training experience is missed, and he misses the one yearly opportunity to have performance evaluated based on actual operations.

a The proposed USAR school mode of CAS3 to be tested in selected USAR schools during FY 86 or FY 87 could bring partial relief. However, there is not much incentive for the RC officer to apply for attendance at the course and double the time he is required to spend away from his civilian job, unit and family when there is no pay for the additional time and the O5 promotional requirements can be met by attendance at CGSOC which also qualifies the officer for promotion through the grade of 06 (NOTE: AR 135-155 prescribes the following educational requirements for promotion of RC officers.).

Grade		
From	*To*	*Requirement*
MAJ	LTC	*Fifty percent of CGSOC
LTC	COL	The CGSOC

*Must complete CGSOC within 3 years of promotion to LTC regardless of method of qualification for promotion to LTC.

b Regardless of options available, staff development training will not be obtained by all RC officers unless it is tied to promotion and/or retention. Therefore, regulations must be changed to require completion of the "Staff Officer Development Course" for retention beyond the third year after promotion to Major and to make the course the qualifier for promotion to the rank of LTC. This should only become mandatory for officers commissioned after FY 85 but should be made an option for all others as soon as the course is available. CAS3 should be publicized as the perferred method of staff development. It also fulfills the mandatory requirement for retention and promotion as specified for Staff Officer Development Course.

2 The change noted in para 2e(1)(b)*1.* above makes CGSOC mandatory for promotion to the grade of Colonel (06) only. Therefore regulations must be changed to eliminate the requirement to complete CGSOC within three years after promotion to LTC. Because of the Reserve Component troop program unit (TPU) structure, the vast majority of RC officers will never be called on to serve at a staff level higher than Bde/Regt. However, the current system mandates that all RC officers aspiring to reach the grade of 05 participate in the CGSOC even though the primary objective of that course is to produce staff officers for Division and Corps headquarters. This is not to say that RC officers should not be allowed to train for higher level assignments. Quite the contrary, the system should encourage the highest possible level of professional development for every RC officer that can avail himself of the opportunities. The basic differences in the professional development required of a RC officer versus an AC officer is the minimum proficiencies required of each to perform their military duties. The RC officer is primarily faced with having to possess the proficiencies and/or skills necessary to perform in his mobilization or "go to war" assignment. While the AC officer must be prepared with the same "go to war" skills, he must also continually operate in assignments requiring peacetime or deterrent skills. Peacetime, deterrent, and administrative duties

in RC units are mainly performed by Full-Time Support personnel. Therefore, RC line officers may focus more on "go to war" requirements in the limited time available. Current CGSOC level courses contain a significant amount of time devoted to peacetime staff requirements, most of which are not directly required for the RC officer to perform his "go to war" mission. This indicates that with careful analysis, courses can be specifically tailored to meet wartime needs with substantially less training time required. Based on this, it is expected that the "Common Core" (see Annex DD for discussion of Common Core) for the MEL-4 course can probably suffice for the bulk of the RC phase of CGSOC.

3 With implementation of the requirement for RC officers to complete a Staff Devel opment Course within three years after promotion to major and with CGSOC the prerequisite for promotion to Colonel, the RC Lieutenant Colonel selected for command will have a greater than ever need for assistance in preparation for command. The current 5 week active component pre-command course which consists of two weeks at CAC and up to three weeks at the branch school, contains several blocks of instruction which have limited applicability within the Reserve Components. In addition, the length will prohibit attendance by a majority of RC commanders. As an outgrouth of the RETO study, a precommand course was developed and pilot tested in late 1983. Ideally this pilot course should form the basis for the development of a RC specific pre-command course. Further explanation is provided in Annex R.

(2) Other areas requiring actions are:

(a) Development of Full-Time Support Officers. The primary reason all RC officers cannot be developed the same as AC officers is the conflict with civilian occupation. Since that conflict does not exist for Full-Time Support Officer (Military Technician or AGR), there is no valid reason why those officers should not receive the full range of officer professional development. A highly developed Full-Time Support force will enhance readiness through providing personnel well qualified to accomplish the day to day "peacetime" tasks and therefore free the drilling RC officer to concentrate on "go to war" skills, plus providing better mentor and trainer capabilities.

(b) Development of means to expedite branch changes. Because of the requirement for many RC officers to change branch and/or specialty numerous times in a career and because the actual amount and type of training required by each individual can vary significantly based on a combination of skills/knowledge gained from civilian life and previous military assignments, the Army needs a system that can identify the actual needs of the individual. There should then be a menu of modulor courses that can satisfy those needs without the individual being required to take something he or she is already qualified in. Those modules should be short, branch specific, technically oriented and based on duty requirements. There should also be provisions for proving competency (testing out) for individuals who may already be qualified based on experience. If the system is developed and instituted, it can significantly reduce the hours required of RC officers.

(c) Maintenance on non-resident programs of instruction. Due to the large reliance on this mode of education by RC officers and the recognized need for those individuals to receive the best military education possible, it is mandatory that the development and maintenance of NRI courses always received equal priority as resident courses.

(d) Determination of how much can be expected of average RC officers before they are forced out of the system. This needs to be determined based on better data than the completely subjective information now available. There is virtually no data available now that gives a valid indication of why RC officers either stay with the system or get out. Most people who should be "in the know" readily admit that there are officers who will leave the system regardless of requirements placed on then, and there are those who seem to be able to take anything and everything that is thrown their way. The problem is, no one knows how many are in either category or somewhere in between. Everyone seems to recognize that the current reliance on Reserve Component creates a training and development mission that places an extremely heavy time burden on RC officers. Most recognize that everything added to the existing load can only be done at a recognized risk.

(e) Compensation for NRI professional development. Since RC officers must maintain professional development in two careers, civilian and military, additional time demanded of the individual seems to be the biggest deterrent to participation in professional development courses. Therefore, all means of encouragement should be explored, to include compensation, either monetary or allowing additional retirement credits to actually count towards retirement pay.

3. Recommendations.

a. The DA Action Plan for Reserve Component Training, dated 6 August 1984, as it pertains to changes in the Officer Advance Course should be implemented at once.

b. A nonresident instruction (corresponding studies type) Staff Development Course with no more than two weeks in residence should be designed and implemented for the Reserve Components as an alternative for RC Officers who cannot attend the resident or USAR school CAS3. Then after the Staff Development Course is implemented, it or CAS3 will be the minimum education requirement for promotion to LTC and will be required NLT the end of the third year after promotion to Major (See Appendices 3 and 4).

c. Make completion of CGSOC the educational requirement for promotion to Colonel (06) only and eliminate the requirement to complete it within three years after promotion to LTC.

d. Develop a pre-command course tailored to the needs of RC 05/06 commanders (See Appendix 4 and Annex R).

e. Ensure that all USAR officers selected for MEL-1 schooling will receive priority for nomination to Individual Mobilization Augmentee (IMA) and troop program unit position vacancies.

f. Require Reserve Component full-time support officers (Military Technician and AGR) to be professionally developed in accordance with AC counterparts (See Appendix 4).

g. TRADOC, together with NGB and OCAR, develop a system for determining education/training required to expedite branch changes for Reserve Component officers and develop specific courses and/or competency evaluations for this purpose (See Appendices 3 and 4).

h. Focus Reserve Component MQS primarily on functional requirements of mobilization duty positions.

i. TRADOC, together with NGB and OCAR, concentrate on development of education/training methods support strategy which is aligned with the active component strategy described in Annex P. Modalities will assist individual self-development with minimum in-resident schooling required (See Appendices 3 and 4).

j. Direct a study to assess the impact of PDOS policies (especially those related to resident and non resident school instruction, unit training requirements and use of computer-communications based instruction) on the Reserve Component officer, his/her family and civilian employer. Study should look at officer willingness to remain in the Reserve Components as military time requirements increase (See Appendices 3 and 4 and Annex P).

k. Ensure that non-resident military instruction programs, used extensively by the RC, are developed simultaneously with resident programs and that they are maintained current at all times (See Appendices 3 and 4).

l. Evaluate the feasibility of providing appropriate compensation for RC officers who pursue professional development through programs of non-resident instruction.

4. CSA Remarks. Approved in concept.

Appendices

1 Glossary
2 Bibliography
3 Action Plans
4 Phasing Plans

Authors: COL Dollar/LTC Carter

Appendix 1 to Annex HH

Glossary

Abreviations:

AC	Active Component
AGR	Active Duty Guard/Reserve
ARNG	Army National Guard
ARPERCEN	US Army Reserve Personnel Center
FTS	Full-Time Support
IMA	Individual Mobilization Augmentee
IRR	Individual Ready Reserve
MUSARC	Major United States Army Reserve Command
NGB	National Guard Bureau
OCAR	Office of the Chief Army Reserve
PDOS	Professional Development of Officers Study
RC	Rese Components
TPU	troop program unit
USAR	United States Army Reserve

Definition of Terms

Active Duty Guard/ Reserve	Guardsmen and Reservists on active duty solely to provide full time support to the Reserve Components and who are paid from Reserve Personnel Appropriations of the Department of Defense Military Service.
Military Technician	Excepted service employees of the Reserve Components who provide full time support to units of those components and who must be members of a RC unit supported.
Reserve Components	Army National Guard of the United States and the United States Army Reserve
Troop program units	Organized units of the ARNG and the USAR.

Authors: COL Dollar/LTC Carter

Appendix 2 to Annex HH

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RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES

117 Design and implement a Reserve Component Staff Officer Development Course.
 	
--Course designed to be three phases as follows:
  (1) Phase I of CAS³.
  (2) ACCP Bn/Bde Staff development, phase II.
  (3) Final phase, two week resident at Ft. Leavenworth.
 	
--Phase II to be structured to require input in form of written papers, studies, etc..
 	
--Phase III to concentrate on coordination and oral presentation.
 	
All exercises designed around Bn/Bde scenarios.
	o Announce policy, change and amend AR 135-155/NGR 600-100 to require completion of this course (or CAS³) by end of third year as Major for all Reserve Component officers commissioned after 1 October 1985.	ODCSPER (P) NGB, OCAR	1Q FY86	Note 1

	o Develop POI.	TRADOC (P), USACAC	2Q FY87	Note 2
	o Prepare ACCP material.	TRADOC (P), USACAC	2Q FY89	
	o Enroll students.	FORSCOM, NGB, OCAR	3Q FY89	
	o Finalize resident phase.	TRADOC (P), USACAC	1Q FY90	
	o. Conduct resident phase.	USACAC	1Q FY91	

NOTES: 1. Course will not be available to AC or full-time support officers of RC.

         2. Goal is to limit ACCP phase to 160 hours.

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
188 Develop a system to expedite Reserve Component branch change/ qualification.	o Develop branch specific courses in short modules.	TRADOC (P) PROPONENTS	2Q FY87	
	o Test/validate modular courses.	TRADOC (P) PROPONENTS	4Q FY88	
	o Implement modular courses.	TRADOC (P) PROPONENTS	1Q FY89	
	o Develop competency test by branch to determine requirements for specific modular courses.	TRADOC (P) PROPONENTS	2Q FY88	
	o Test/validate "test out" concept.	TRADOC (P) PROPONENTS	4Q FY89	
	o Implement "test out" concept.	TRADOC (P) PROPONENTS	1Q FY90	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
F86 Direct TRADOC, together with NGB and OCAR, to concentrate on the development of an education and training methods support strategy which is aligned with the Active Component strategy.	Implemented thru CCBI office (see policy F70), NGB and OCAR representatives.	See policy F70		see policy F70

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
F87 Direct ODCSPER, together with NGB and OCAR, to study the impact of PDOS policies, specifically those related to resident and non-resident instruction, unit training requirements and use of CCBI, on the Reserve Component officer, his family and civilian employer.	o Obtain study funds for FY 87 program.	ODCSPER (P) ARI ODCSOPS-Tng	4Q FY85	
	o Draft study directive.	ODCSPER	4Q FY85	
	o Initiate study.	Contractor	1Q FY87	
	o Complete study.	Contractor	4Q FY37	
	o Incorporate recommendation in CCBI office actions.	CCBI Ofc	1Q FY88	

NOTES:

RECOMMENDATION	SUPPORTING ACTION(S)	AGENCIES: (P)-PRIMARY RESP.	REQUIRED COMPLETION	NOTES
J26 Develop resident and non-resident instruction programs simultaneously and maintain current.	o Evaluate all current programs of non-resident instruction to determine those that are under-subscribed, unneeded or out of date.	TRADOC (P) PROPONENTS	4Q FY86	
	o Establish a procedure that will ensure that programs of non-resident instruction are developed concurrently with resident programs of instruction.	TRADOC	2Q FY86	
	o Develop resource requirements and program funds.	TRADOC	2Q FY87	
	o Establish a proceduce that will ensure all programs of non-resident instruction are reviewed and updated at least annually.	TRADOC (P) PROPONENTS	3Q FY86	
	o Implement procedures that ensure programs of non-resident and resident instruction are developed concurrently and adequately maintained.	TRADOC (P) PROPONENTS	1Q FY88	

NOTES:

PHASING PLAN

Timeline (FY85 – FY96):

- DEVELOP CURRICULUM
- PREPARE COURSE SUPPORT MATERIAL
- DEVELOP RESIDENT PHASE
- STUDENT ENROLLED
- 1st RESIDENT PHASE
- IMPLEMENT
- CHANGE AR 135-155 AND NGR 600-100

RESOURCES	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY							250/10	600/23	900/35	1200/46	1600/62	2000/77
STAFF AND FACULTY—MIL/CIV		2/2	2/4	2/4	6/4	6/4	8/4	8/4	10/4	10/4	12/4	12/4
TDA CHANGE—$ MILLIONS		.2	.3	.3	.4	.4	1.4	2.6	3.8	4.8	6.3	7.7

1/ RC STAFF DEVELOPMENT COURSE (ACDC) DESIGNED AND IMPLEMENTED.

2/ REGULATIONS CHANGED TO REQUIRE STAFF DEVELOPMENT COURSE (OR CAS3) FOR PROMOTION TO LTC (COMPLETE WITHIN 3 YEARS AFTER PROMOTION TO MAJ).

PHASING PLAN

Diagram labels:
- REVIEW/UPDATE POI
- STAFF INITIAL CLASS
- 200 Students
- 300 Students
- 400 Students
- 500 Students
- SELECTED RESERVE COMPONENT OFFICERS ATTEND ACTIVE PRE-COMMAND COURSE
- CONTINUE TO EMPHASIZE DESIRABILITY TO ATTEND ACTIVE PRE-COMMAND COURSE

RESOURCES

	FY85	FY86	FY87	FY88	FY89	FY90	FY91	FY92	FY93	FY94	FY95	FY96
STUDENTS NR/MY		200/3.8	300/5.8	400/7.7	500/9.6	500/9.6	500/9.6	500/9.6	500/9.6	500/9.6	500/9.6	500/9.6
STAFF AND FACULTY-MIL/CIV		2/0	2/0	3/1	3/2	5/2	5/2	5/2	5/2	5/2	5/2	5/2
TDA CHANGE-$ MILLIONS		.36	.54	.72	.72	.9	.9	.9	.9	.9	.9	.9

POLICY: DEVELOP A PRE-COMMAND COURSE 05106 TAILORED TO THE NEEDS OF RC COMMANDERS.

NOTES:
1. MOST LIKELY SITE FOR RC PCC IS NATIONAL GUARD PROFESSIONAL EDUCATION CENTER. COULD PROBABLY SUPPORT BOTH NG AND USAR COMMANDERS.
2. RESPONSIBILITY FOR REVIEWING AND UPDATING POI IS CAC. NGB, OCAR AND FORSCOM.
3. DURATION OF RC PCC IS 5-7 CLASS DAYS.

Appendix 4 to ANNEX HH

PHASING PLAN

Annotations (schedule milestones, FY 85 – FY 96):
- CHANGE AR 135-18 — IMPLEMENT FOR AGR
- IMPLEMENTATION FOR MILITARY TECHNICIANS
- RESOLVE LEGAL ISSUES FOR MILITARY TECHNICIANS

18/ DEVELOP RC FULL-TIME SUPPORT OFFICERS IN ACCORDANCE WITH AC COUNTERPART.

(OAC AND CAS3 IN RESIDENCE)

RESOURCES

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY		54.2	96.1	144.2	144.2	144.2	144.2	144.2	144.2	144.2	144.2	144.2
STAFF AND FACULTY-MIL/CIV												
TDA CHANGE-$ MILLIONS		2.8	5.9	9.4	9.4	9.4	9.4	9.4	9.4	9.4	9.4	9.4

PHASING PLAN

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96

DEVELOP COURSE — TEST/VALIDATE

IMPLEMENT MODULAR COURSES

DEVELOP TEST — TRIAL PERIOD

IMPLEMENT "TEST OUT" CONCEPT

RESOURCES

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
STUDENTS NR/MY		20/20	20/20	5/5								
STAFF AND FACULTY—MIL/CIV												
TDA CHANGE—$ MILLIONS		1.4	1.4	.3								

188

DEVELOP SYSTEM TO EXPLOIT RC BRANCH CHANGE/QUALIFICATION.

BRANCH SCHOOLS DEVELOP BRANCH SPECIFIC COURSES IN SHORT MODULES.

DEVELOP SYSTEM TO DETERMINE REQUIREMENTS AND/OR EXEMPTIONS (ROM REQUIREMENTS BASED ON COMPETENCY TESTING (TEST OUT CONCEPT).

PHASING PLAN

RESERVE COMPONENT IMPACT STUDY

F87

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
RESOURCES												
STUDENTS NR/MY												
STAFF AND FACULTY-MIL/CIV												
TDA CHANGE-$ MILLIONS			.075									

PHASING PLAN

J26 DEVELOP RESIDENT AND NON-RESIDENT INSTRUCTION PROGRAMS SIMULTANEOUSLY AND MAINTAIN CURRENT.

PROGRAM CONCUR DEVELOPMENT

RESOURCE REQUIREMENTS

ANNUAL UPDATE

EVALUATE CURRENT NON-RESIDENT

IMPLEMENTATION

CURRENT NON-RESIDENT INSTRUCTION PROGRAMS

	FY 85	FY 86	FY 87	FY 88	FY 89	FY 90	FY 91	FY 92	FY 93	FY 94	FY 95	FY 96
RESOURCES												
STUDENTS NR/MY												
STAFF AND FACULTY-MIL/CIV	1/1	6/6	6/6	18/20	18/20	18/20	18/20	18/20	18/20	18/20	18/20	18/20
TDA CHANGE-$ MILLIONS	.07	.42	.42	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3	1.3