

History of Joint Staff Strategic Planning, 1949–2020

**Christopher D. Holmes and
Colonel Francis J. Park**



Special Historical Study 14

**Joint History and Research Office
Office of the Chairman of the Joint Chiefs of Staff
Washington, DC • 2021**

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Foreword

This study examines the role of the chairman of the Joint Chiefs of Staff and the Joint Staff in strategic planning. Such planning began just after World War II as a way of preparing for a global war against the Soviet Union. After the demise of that monolithic threat in 1991, the general consensus of senior military leaders was that threats would become more diffuse and generally confined within a geographic region. That shifted the locus of planning efforts to the combatant commands and away from the Joint Staff. But declining defense budgets and the consequent need to more carefully husband resources prompted the Joint Staff to adopt a role of reviewing and balancing various combatant command plans. By 2015, however, the return of threats with global reach caused the staff to revert to its more centralized role, arbitrating and synchronizing combatant command efforts to address those threats wherever they appeared. This review not only connects presidential level strategy documents to those produced by the Joint Staff across these three different phases, but also for the first time documents how the twenty-first century concept of global integration came to be.

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Washington, DC
January 2021

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HISTORY OF JOINT STAFF STRATEGIC PLANNING 1949–2020

The strategic level of planning by the Chairman of the Joint Chiefs of Staff (CJCS) and the Joint Staff originally focused on a global view of countering the threat posed by the Soviet Union. After the fall of this monolithic adversary in 1991, the Joint Staff's view of strategic planning changed significantly. The need to reconcile a wide variety of threats against declining budgets drove the CJCS and Joint Staff to examine and assess plans from the perspective of the combatant commands rather than from a broad, more strategic-level view. As the nature of threats evolved around 2015, the pendulum swung back toward a more strategic view for the CJCS and the Joint Staff.

1949–1954

The 1949 amendment to the 1947 National Security Act established the position of CJCS and formally established a Joint Staff to assist him in his duties. Listed first among the duties of the position was the “preparation of strategic plans” and exercising “strategic direction” of the American military. Additionally, the law charged CJCS with reviewing “major material and personnel requirements” associated with the plans he prepared.¹

The Joint Staff found itself somewhat perplexed by this guidance, since, as the Director of the Joint Staff noted in December 1949, no one defined what exactly such strategic plans were to be, much less their “interrelationship.”² With the lack of such direction, the director proposed a “program for planning.” He defined a “Joint Chiefs of Staff War Plan” as a “strategic plan for a war to commence in a certain period prescribed in that plan.”³ He went on to describe three basic war plans, all of which addressed countering the Soviet Union: 1)

¹ The National Security Act of 1947 as amended, Public Law 216, 81st Congress, 10 August 1949, Sec 211.

² Director of the Joint Staff, “Report to the Joint Chiefs of Staff on Program for Planning by the Joint Chiefs of Staff Organization,” JCS 2089, 2 December 1949, 1.

³ Director of the Joint Staff, “Report to the Joint Chiefs of Staff on Program for Planning by the Joint Chiefs of Staff Organization,” Enclosure B, JCS 2089, 2 December 1949, 1.

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an emergency war plan for a potential war within the next year; 2) a plan for “budget and mobilization guidance” for three years out; and 3) a long-range war plan for eight to ten years out.⁴ The director’s proposal formed the baseline for Memorandum of Policy (MOP) 84, first issued in July 1952 and that outlined the strategic planning process. Of the three war plans discussed in MOP-84, the long-range one became known as the Joint Long Range Strategic Estimate (JLRSE), a forecast of “probable areas of conflict, outline of the type of war expected and basic undertakings required.”⁵ The mid-range plan for budget and mobilization guidance was named the Joint Strategic Objectives Plan (JSOP) and provided the services the basis for preparing their budget submissions and mobilization plans.⁶ The third plan, the short-range one, was called the Joint Strategic Capabilities Plan (JSCP), and outlined the distribution, use, and support for existing forces should war erupt in the following year.⁷ The JSCP also served as the baseline document from which the commanders of unified commands could develop their plans (note: to reflect historical usage, this paper will use the term “unified commands” until it reaches 2002, when the common term of reference became “combatant commands”).⁸ The JSCP traced its roots to the original post-World War II war plan to fight the Soviets, dubbed “HALFMOON.” After numerous iterations and delays, the Joint Chiefs of Staff (JCS) approved the first JSCP on 31 March 1954, disseminating it as JCS 1844/156 on 14 April 1954.⁹

1958–1968

The Defense Reorganization Act of 1958 changed little about the planning process. While it mandated the reorganization of the Joint Staff from a series of committees to conventional staff lines (what today is known as the J-series of directorates), it did not alter the methods used by the staff. The act directed each of the Joint Chiefs to “exercise supervision” over their respective forces, though such forces still operated under the authority of the unified commands. This meant that the Joint Staff continued its focus on developing strategic level plans, but not engaging in the operational-level planning processes, implying such plans remained at the unified command level. Consequently, the unified commands found themselves tasked with execution, but with little input into the plans that drove that execution.

⁴ Ibid., 7–9.

⁵ Robert J. Watson, *Joint Chiefs of Staff and National Policy, 1953–1954* (Washington, DC: Office of Joint History, 1998), 90.

⁶ Ibid.

⁷ Ibid.

⁸ Ibid., 91.

⁹ Historical Division, Joint Secretariat “A Brief Background to the Origin of the JSCP,” 24 August 1972, 4.

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Also unchanged was the focus of the various strategic plans. For example, the 1961 edition of MOP-84 plainly stated that the “strategic appraisal” section of the JSOP would address “the communist threat to the security of the Free World nations in cold, limited, and general war.”¹⁰ Three years later, the JSOP of 1964 directed planning for a “two-war” capability to confront the Soviet Union, with the major effort in Western Europe and a secondary effort for a “non-NATO operation” that could be curtailed if the major effort with NATO needed reinforcements.¹¹ Similarly, even at the height of the conventional war in Vietnam in 1968, MOP-84 outlined a JSCP and other strategic plans that regarded the world through the lens of confrontation with the Soviets, consistently referring to Free World forces and strategies.¹²

Despite a seeming clarity of focus, the strategic planning process become increasingly complex and somewhat difficult to grasp. To facilitate planners’ understanding, the 1968 edition of the memorandum was the first to include a diagram (figure 1) to depict the process visually as well as verbally.

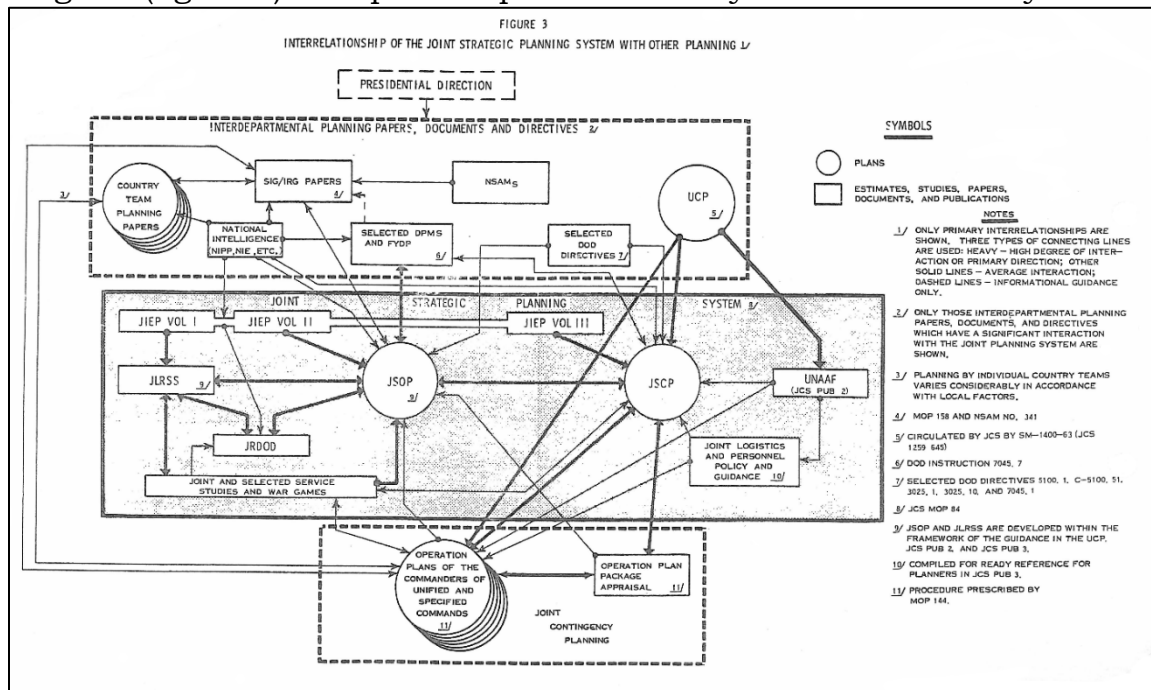


Figure 1. Interrelationship of the JSPS with Other Planning in 1968 Edition of MOP-84.¹³

¹⁰ Joint Chiefs of Staff Memorandum of Policy 84, “Joint Strategic Planning System,” 29 November 1961, 4.

¹¹ JCS 2143/233 (JSOP-70 Parts I-V),” 5 Aug 64; Decision On JCS 2143/233, Parts I-V of JSOP-70, 5 Aug 64; same file, sec. 2 in Walter S. Poole, *The Joint Chiefs of Staff and National Policy, 1965–1968* (Washington, DC: Office of Joint History, 2012), 11.

¹² Joint Chiefs of Staff Memorandum of Policy 84, “Joint Strategic Planning System,” 19 June 1968, 14–19.

¹³ *Ibid.*, 35.

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1969–1978

In 1969, Secretary of Defense Melvin R. Laird urged President Richard M. Nixon to form a panel to examine defense acquisition practices, a move that would have implications for the planning process. President Nixon agreed and appointed a blue ribbon panel in 1970. Since the acquisition of weapon systems derives from requirements established in war plans, the panel also necessarily studied the planning process. Panel members critiqued the relative lack of involvement of unified commanders in the process, arguing that while those commanders had responsibility for operations, they had little effective input or influence on the planning process.¹⁴ The panel also complained about the structure for executing a global conflict:

There is inadequate coordination between the strategic defensive and strategic offensive forces which must operate in the same physical space; the strategic offensive mission is split between four commands, SAC, EUCOM, LANTCOM and PACOM; the six area commands do not individually have a proper purview to permit realistic contingency planning. . . The present structure . . . is excessively layered, unwieldy and unworkable in crises, and too fragmented to provide the best potential for coordinated response to a general war situation.¹⁵

Much of what the panel complained about was found in the JSOP, a document the JCS continued to produce annually until 1978. That year, to align with new secretary of defense guidance, the JCS replaced the JSOP with the Joint Strategic Planning Document (JSPD). The JSPD reflected a change in timing to influence secretarial guidance but otherwise retained the strategy and force recommendations from the JSOP, repackaged as a “concise, comprehensive” worldwide appraisal that also outlined recommended military objectives as well as a recommended strategy to accomplish those objectives.¹⁶ Overall, the Joint Staff maintained a predominantly global perspective against the Soviet Union through the JSOP and subsequent JSPD.

Yet, despite the scathing critique from the panel, nothing substantially changed for a dozen years due to a combination of political obstructions and unwillingness to change, along with intransigence from the services.¹⁷

¹⁴ Gilbert W. Fitzhugh, chairman, Report to the President and the Secretary of Defense on the Department of Defense by the Blue Ribbon Panel (Washington, DC: Department of Defense, 1 July 1970), 53.

¹⁵ Ibid.

¹⁶ JCSM-94-78 to SecDef, 10 April 1978 (JCS 2522/7-2).

¹⁷ James R. Locher III, *Victory on the Potomac* (College Station, TX: Texas A&M University Press, 2002), 30–31.

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1982–1985

By 1982, there grew a recognition that while a war against the Soviet Union was the most dangerous possibility, it was not as likely as a regional conflict erupting in one of the regions overseen by the unified commands. Korea and Vietnam provided two prominent, historical examples. When coupled with the argument from the Blue Ribbon Panel, few were surprised when CJCS General David C. Jones wrote that year that he and his fellow service chiefs “increase[ed] the combatant commanders’ opportunity to influence resource decisions.”¹⁸ Jones went on to claim that after providing military advice to the president and the secretary of defense, his next most important duty was “overseeing” the unified commands.¹⁹

The 1983 version of MOP-84, though retaining a strategic concentration, also revealed a tilt toward the unified commands. For example, it described the JSPD as providing a “comprehensive military appraisal” on threats and objectives “worldwide” without a clear or specific reference to the Soviet Union.²⁰ This edition of MOP-84 also addressed the JSCP, indicating its function was to provide “guidance for the development of plans” and “assign tasks” to the unified commanders.²¹ In so doing, it echoed what had been critiqued before: it was top-down driven guidance reflecting a global view. Yet the policy also revealed the growing role of the unified commanders. For instance, the policy directed the Joint Chiefs to provide an assessment “taking into consideration the views of commanders of unified and specified commands” as part of a Joint Program Assessment Memorandum.²² Additionally, directions for the JSCP mandated unified commanders “advise” the Joint Chiefs if “forces and/or resources made available are inadequate to accomplish an assigned task or that other serious limiting factors exist.”²³ Those statements, along with the comments from General Jones the year before, served as harbingers for a significant shift that realigned the Joint Staff’s planning focus three years later.

1986

1986 proved to be a pivotal year for the Joint Staff’s planning processes. One of the two major drivers of change was the Packard Commission report. President Ronald W. Reagan commissioned the group via National Security Decision Directive (NSDD) 175 to respond to a public outcry over scandals regarding

¹⁸ General David C. Jones, “Why the Joint Chiefs of Staff Must Change,” February 1982, 9.

¹⁹ *Ibid.*, 7.

²⁰ Joint Chiefs of Staff Memorandum of Policy 84, “Joint Strategic Planning System,” 1 February 1983, 18.

²¹ *Ibid.*, 31.

²² *Ibid.*, 26.

²³ *Ibid.*, 32.

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overpriced defense articles and ineffective joint operations. He asked the commission to study Defense Department business practices, acknowledging among other things that perhaps those practices did not fully account for resource constraints.²⁴ Reagan specifically tasked the commission to “review the responsibilities of the Organization of the Joint Chiefs of Staff in providing for joint military advice and force development within a resource-constrained environment” and concurrently to “review the adequacy of the Unified and Specified Command system in providing for the effective planning for and use of military forces.”²⁵

The Packard Commission publicly released its report in June 1986. It contained the seeds of a shift away from the JCS holding a strictly global view toward one that was more regionally oriented. Commission members recommended the chairman not only consult the Joint Chiefs who provide military forces, but also the unified commanders who employ those forces. In so doing, the chairman’s resultant advice “would reflect the best thinking of the nation’s senior military leadership.”²⁶ The commission expanded on that point, saying that in order to provide “sound military advice” to the secretary of the defense and the president, the chairman needed to better analyze military plans. Their report went on to say such analysis ought to include “unique regional considerations that may restrict our ability to employ military force . . . and limits on deployment or mobilization that may restrict our ability to employ military forces in conflict.”²⁷ Though unsaid, the commission clearly pointed out that unified commanders were in the best position to provide those constraints and considerations. Lastly, as if to further emphasize the point about the views of combatant commanders, the report went on to note that while the JSPD served a useful purpose, it could provide better utility if it identified “forces for support of regional unified commanders in pursuit of US national security objectives in peacetime, as well as the more probable, less intense forms of conflict.”²⁸

Influenced by the Packard Commission’s proposals, President Reagan echoed an increase in the salience of unified commands in his message to Congress outlining the need for change within the Defense Department. He said the unified commanders were the ones responsible for warfighting, and how well they would perform that mission depended largely on how well war plans accounted for their needs. Accordingly, he said, the secretary of defense

²⁴ Ronald W. Reagan, National Security Decision Directive 175, “Establishment of a Blue Ribbon Commission on Defense Management,” (Washington, DC: The White House, 17 June 1985), 2.

²⁵ *Ibid.*

²⁶ David Packard, *A Quest for Excellence: Final Report to the President by the President's Blue Ribbon Commission on Defense Management* (Washington, DC, June 1986), 16.

²⁷ *Ibid.*, 17.

²⁸ *Ibid.*, 18.

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“initiated regular meetings” involving the unified commanders in addition to “provid[ing] them greater access to the Department's internal budget process.”²⁹ Reagan thus signaled what Jones had foretold earlier, that the unified commands would move center stage and drive the Joint Staff's priorities.

In the second of two major activities affecting the military structure in 1986, Congress enshrined this realignment in law with the passage of the Goldwater-Nichols Department of Defense Reorganization Act. The act retained previous language that directed the CJCS to conduct strategic planning and added a requirement to “provide for the preparation and review of contingency plans,” as well as consult with the “commanders of unified and specified commands” on evaluating the “preparedness of each such command to carry out missions assigned.”³⁰ Congress further gave commanders of unified commands the “authoritative direction over all aspects of military operations, joint training, and logistics” within their commands.³¹ In total, Congress directed the emphasis of the CJCS (and consequently the Joint Staff who support the chairman) be on supporting the commands in the field.

Furthermore, Congress added requirements about assessment. In addition to preparing plans, it directed the CJCS to “perform net assessments to determine the capabilities of the armed forces . . . as compared with those of their potential adversaries.”³² Additionally, for the contingency plans the CJCS was to prepare, he also was to review them and “advise the secretary on critical deficiencies and strengths in force capabilities (including manpower, logistic, and mobility support)” found in those plans and “assess the effect of such deficiencies and strengths on meeting national security objectives and policy and on strategic plans.”³³ Thus, Congress created an additive requirement for CJCS to review and assess subordinate-level plans, something that did not exist (at least formally) in prior guidance.

Lastly, Congress established a requirement for the CJCS to publish a National Military Strategy (NMS). Such a document was to “increase attention on the formulation of strategy” and ensure a “more efficient use of defense resources.”³⁴ Moreover, Congress intended for it to complement a new requirement for the president: creation of a National Security Strategy (NSS). The intent of the NSS was to provide Congress a report on grand strategy, or how the president intended to orchestrate and align the instruments of

²⁹ Ronald Reagan, Message to the Congress Outlining Proposals for Improving the Organization of the Defense Establishment Online by Gerhard Peters and John T. Woolley, The American Presidency Project <https://www.presidency.ucsb.edu/node/258527>.

³⁰ Goldwater-Nichols Department of Defense Reorganization Act, Public Law 99-433, 1 October 1986, Sec. 153.

³¹ *Ibid.*, Sec. 164.

³² *Ibid.*, Sec. 153.

³³ *Ibid.*

³⁴ *Ibid.*, Sec. 3.

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national power to achieve national security objectives.³⁵ The NSS therefore would serve as the guidepost for every lower echelon. Accordingly, the NMS would align to the NSS, and documents and plans within the military establishment would support the NMS.

1989

Admiral William J. Crowe Jr., the eleventh CJCS, developed a classified National Military Strategy Document (NMSD) in 1989, designed to meet Congress' intent. It addressed such topics as defense policy, national military objectives, force levels as constrained by the budget, and an evaluation of risk. It also included seven separate classified annexes on topics that supported the strategy, such as intelligence and command and control.³⁶ One author later said that to describe the format of this NMSD as “voluminous, stovepiped and highly bureaucratic” was an understatement.³⁷

Broadly speaking, the NMSD reflected a shift from previous strategic documents on the Cold War, describing a deterrence of the Soviet Union through forward-based forces, reinforced by rapidly responding components, and augmented by nuclear weapons.³⁸ Where the NMSD differed from previous expressions of military strategy was its substitution of forward presence versus forward defense to balance deterrence against reduced resources and a greatly reduced Soviet military threat.³⁹

The most notable feature of the NMSD emanated from its force planning feature. Previously, strategic planning documents considered fiscal constraints only after articulating the force structure needed to implement the strategy, consequently offering a not-so-subtle advocacy for large force structure. Crowe's NMSD, however, reversed that advocacy consistent with its recognition of a reduced Soviet threat, considering fiscal constraints on the force prior to evaluating that force's ability to execute the strategy, thus offering a more realistic assessment of strategic risk.⁴⁰

³⁵ Ibid., Sec. 603.

³⁶ Richard M. Meinhart, *Chairmen Joint Chiefs of Staff's Leadership Using the Joint Strategic Planning System in The 1990s: Recommendations for Strategic Leaders* (Carlisle, PA: US Army War College Strategic Studies Institute, 2003), 21.

³⁷ Ibid.

³⁸ Ibid.

³⁹ Lorna S. Jaffe, *The Development of the Base Force: 1989–1992* (Washington: Joint History Office, 1993), 4.

⁴⁰ Harry E. Rothmann, *Forging a New National Military Strategy in a Post-Cold War World: A Perspective from the Joint Staff* (Carlisle, PA, 1992), 12.

1990

By 1990, the Soviet Union was in the throes of collapse, eliminating the monolithic threat against which the CJCS and Joint Staff previously focused their efforts. President George H. W. Bush summed up what this meant for the military in a speech given in August that year. Rather than preparing to fight another world war against a peer competitor, he said the American military's emphasis would "increasingly be shaped by the needs of regional contingencies and peacetime presence."⁴¹ Consequently, the military needed to concentrate on exercising "forward presence in key areas" and "respond[ing] effectively to crisis . . . in whatever corner of the globe they may occur."⁴² Bush's NSS of the same year contained similar themes. It discussed the waning of the Soviet Union, though it also cautioned the threat had not completely dissipated.⁴³ Moreover, Bush warned that other conflicts might move to the foreground and threaten American interests.⁴⁴ He acknowledged that defense of American interests required a forward presence in addition to an ability to project forces to either reinforce existing presence or to establish a foothold.⁴⁵

General Colin L. Powell, the twelfth chairman, followed the president's speech with the first unclassified NMS. From his days commanding US Army Forces Command, Powell had explored the likely force structure necessary in a post-Soviet environment for the United States to still pursue its interests as a superpower.⁴⁶ That force structure, known as the Base Force, guided Powell's military advice on what changes to roles, missions, and force structure would be required going into the 1990s. Powell designed the resultant NMS for both internal defense audiences as well as the American public at large. The NMS language mirrored that of the president's remarks. It noted the most significant shift in defense policy was away from a sole focus on containing communism toward a "diverse, flexible strategy" that was "regionally oriented."⁴⁷ The strategy further added the view that senior military leaders "expected" forthcoming threats to be regional, and that although the military would retain capacity to counter a global threat, the orientation of the military

⁴¹ George Bush, Remarks at the Aspen Institute Symposium in Aspen, Colorado Online by Gerhard Peters and John T. Woolley, American Presidency Project <https://www.presidency.ucsb.edu/node/264984>.

⁴² President George H. W. Bush, Remarks at the Aspen Institute Symposium in Aspen, Colorado Online by Gerhard Peters and John T. Woolley, American Presidency Project <https://www.presidency.ucsb.edu/node/264984>.

⁴³ President George H. W. Bush, *National Security Strategy of the United States* (Washington, DC: White House, March 1990), 10.

⁴⁴ *Ibid.*, 6.

⁴⁵ *Ibid.*, 23.

⁴⁶ Jaffe, *Development of the Base Force*, 12.

⁴⁷ Jaffe, *Development of the Base Force*, 47–50; General Colin L. Powell, *National Military Strategy of the United States* (Washington, DC: Office of the Chairman of the Joint Chiefs of Staff, January 1992), 1.

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establishment, from war plans to the resources to support those plans, would be “primarily focused on deterring and fighting regional rather than global wars.”⁴⁸ Moreover, the strategy indicated the shift of responsibility for developing war plans. Rather than the Joint Staff serving as the central planning entity, a role that made sense when coordinating plans for a global conflict, Powell said that process would be “decentralized,” with the unified commands taking primary responsibility for developing war plans, assisted by the Joint Staff.⁴⁹ Finally, as if to firmly emphasize the point, the NMS concluded the section on planning and employment by bluntly declaring, “We will not retain the forces required for a global conflict.”⁵⁰

Additionally, to align internal Joint Staff processes with the new strategic direction, General Powell replaced MOP-84. The new MOP, designated MOP-7 and titled the Joint Strategic Planning System (JSPS), took effect 30 January 1990.⁵¹ One of the initial tasks outlined in the MOP was the replacement of the JSPD with the NMS.⁵² Additionally, the MOP declared that the JSPS provided a mechanism for the CJCS, “in consultation with [unified commanders]” to examine national security objectives and threats thereto.⁵³ The MOP also outlined the process for developing the strategic overview, pointing out that the process included significant input from each of the unified commands.⁵⁴ While the document noted the top-down direction, it consistently pointed out such direction was shaped and influenced by the unified commands. It further articulated the role of the JSCP, which was to provide “strategic guidance” to the unified commanders for them to “accomplish assigned strategic tasks.”⁵⁵ In an echo of earlier guidance, the chapter on the JSCP noted that it provided direction “to the services and defense agencies for supporting the unified commands,” clearly indicating their prominent role.⁵⁶ Lastly, descriptions of other strategic level documents, such as the Chairman’s Program Assessment, pointedly mentioned the requirements of the unified commands to meet their taskings, again reflecting the centralized role of those commands. The relationship of these documents to each other appears in figure 2.

⁴⁸ Powell, *National Military Strategy of the United States*, 11.

⁴⁹ *Ibid.*, 13.

⁵⁰ *Ibid.*, 16.

⁵¹ Joint Chiefs of Staff Memorandum of Policy 7, “Joint Strategic Planning System,” 30 January 1990, 1.

⁵² *Ibid.*

⁵³ *Ibid.*, 2.

⁵⁴ *Ibid.*, 20–23.

⁵⁵ *Ibid.*, 6.

⁵⁶ *Ibid.*, 41.

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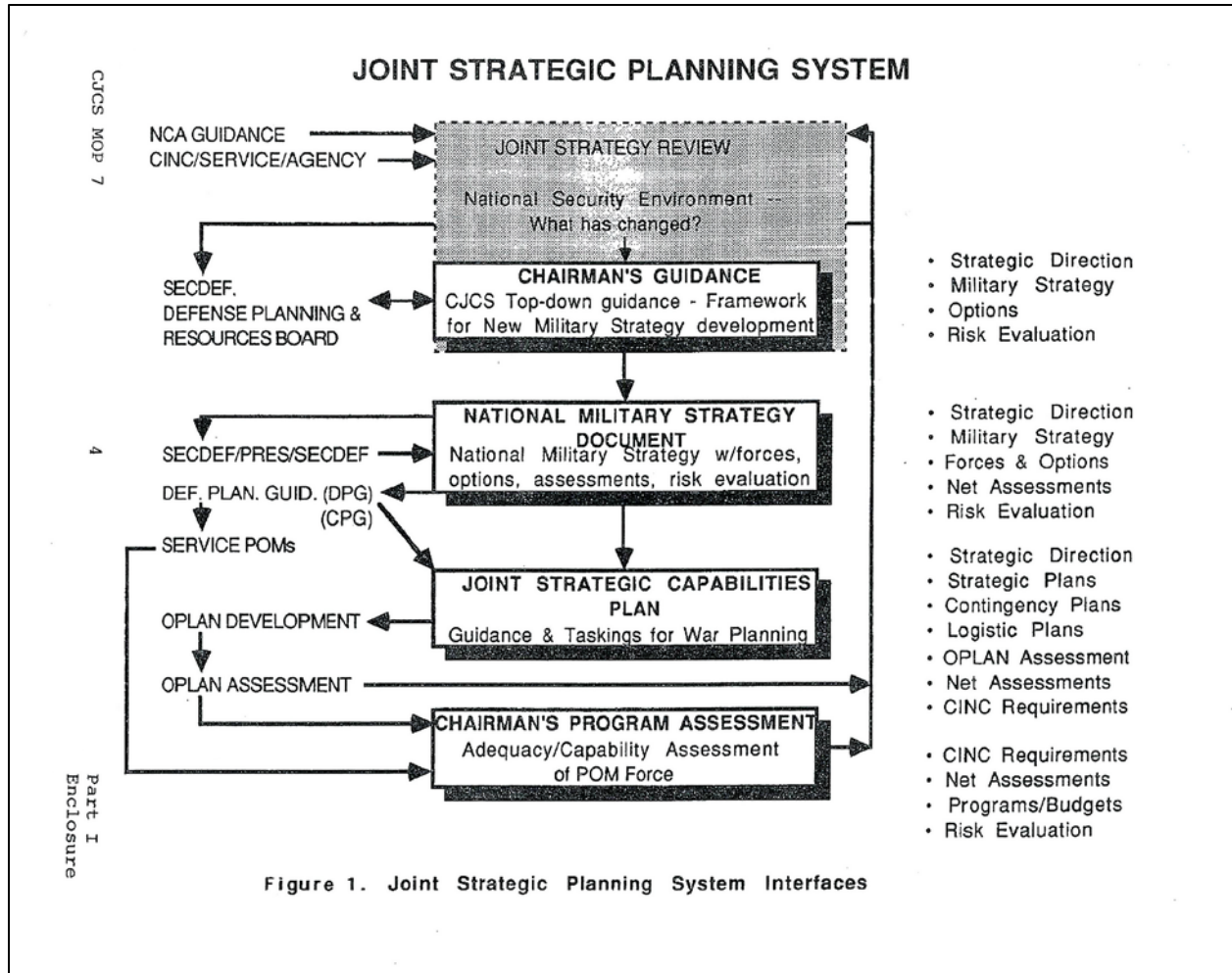


Figure 2. Joint Strategic Planning System Diagram in CJCS MOP 7, 1990.

The confluence of these systems became best known in a chart that appeared in the 1991 edition of Armed Forces Staff College's Publication 1. Originally titled the "Pretzel Chart," it became better known over time as the "Rolling Doughnuts" chart. It showed the relationship of the JSPS with the Joint Operations Planning System; the Planning, Programming, and Budgeting System; and the DoD Acquisition System as an interrelated set of processes. As depicted in figure 3, they were all depicted as complementary, without one being a subset of any other.⁵⁷

⁵⁷ J. E. Magness et al., eds., *The Joint Staff Officer Guide 1991*, Armed Forces Staff College Publication 1 (Norfolk, VA: National Defense University, Armed Forces Staff College, 1 January 1991), 5-27.

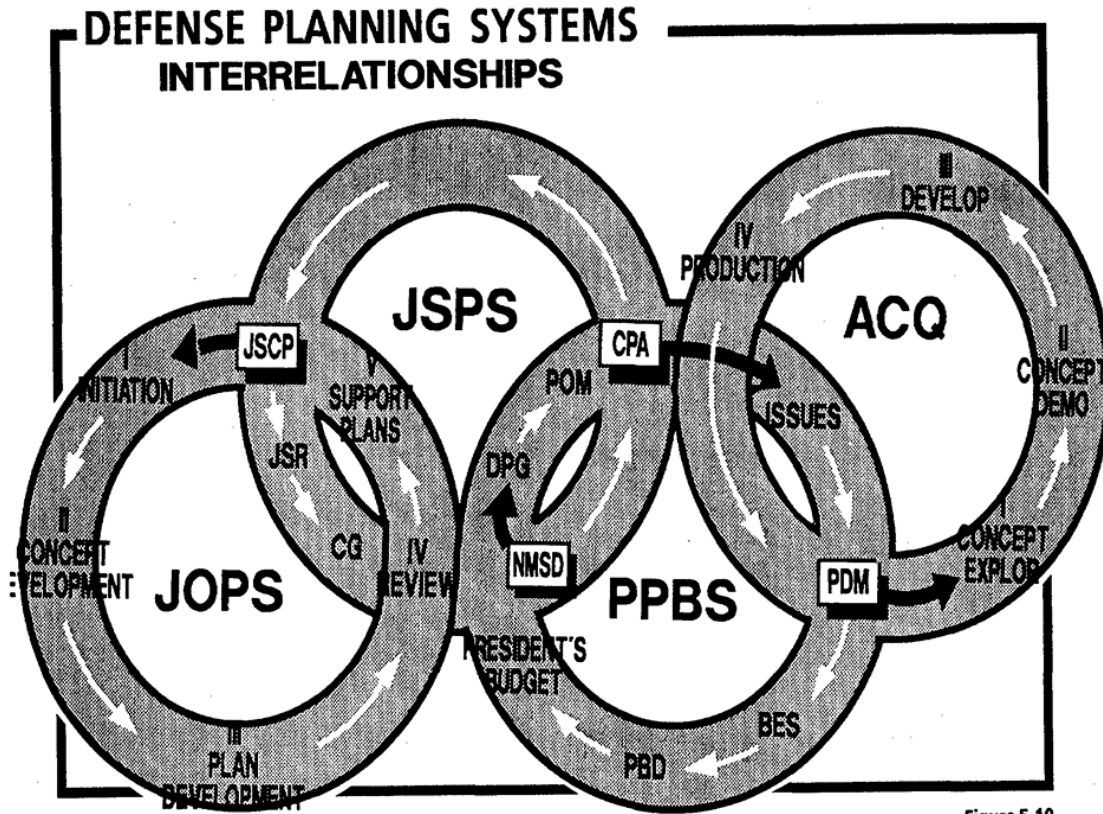


Figure 5-10

Figure 3. Defense Planning Systems Interrelationships (“Pretzel Chart”/“Rolling Doughnuts”) from Armed Forces Staff College Publication 1, 1991.⁵⁸

1993

In the wake of the demise of the Soviet Union, Secretary of Defense Leslie “Les” Aspin Jr. initiated a Bottom Up Review in March 1993. His intent was to re-examine force structure, plans, and assumptions since the major adversary that had been the focus of defense planning for decades had withered away.⁵⁹ Secretary Aspin found that “chief among new dangers” facing the United States in the new security environment was regional conflict.⁶⁰ Such conflicts ranged from large-scale “aggression” from state actors to small-scale contingencies arising from ethnic or cultural conflict, terrorism, or insurgencies.⁶¹ Aspin cautioned, however, against reducing the size of the military in the face of the

⁵⁸ Ibid.

⁵⁹ Les Aspin, *Report on the Bottom Up Review* (Washington, DC: Department of Defense, October 1993), iii.

⁶⁰ Ibid.

⁶¹ Ibid., 2.

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changed threat, saying that one adversary might attempt to take advantage of American strategic distraction with another. As such, Aspin advocated for enough force structure to fight two major theater wars nearly simultaneously.⁶² He further argued for maintaining some forward-deployed forces to deter aggression, but that the Defense Department could reduce those levels in order to maintain a greater number of forces in the United States that could deploy wherever needed.⁶³ Overall, he said US military forces needed to be structured in a way to retain “flexibility” to counter any kind of threat in any kind of environment.⁶⁴

1997

The year 1997 marked the next significant shift for the Joint Staff and the planning process. That year, the administration of President William J. “Bill” Clinton released its second-term NSS. This document repeated themes from Clinton’s first term, all focused on a variety of transnational threats from overseas.⁶⁵ It also reiterated the theme from the previous administration that the downfall of the Soviet Union opened up new challenges in various regions to coincide with new opportunities.⁶⁶ Clinton went on to say that to make America secure, the country needed to provide worldwide leadership, particularly in resolving conflicts.⁶⁷ He added that a “central thrust” of his strategy was the fostering of international security relationships so that America would not have to bear the security burden alone.⁶⁸ Even nuclear forces, once thought to exist solely for a global conflict against the Soviet Union, now served to demonstrate international security commitments and deter “any hostile foreign leadership” that desired acquiring nuclear weapons.⁶⁹ Finally, Clinton said that American military forces needed to be ready to conduct “multiple, concurrent operations” across the globe.⁷⁰

Section 923 of the Fiscal Year (FY) 1997 National Defense Authorization Act (NDAA) legislated a requirement for a Quadrennial Defense Review (QDR). The resulting document served as an overall defense strategy to complement the NSS, reflected the themes in the NSS, and directed several actions that significantly impacted Joint Staff planning. The first was the direction to “trim

⁶² Ibid., 7.

⁶³ Ibid., 8.

⁶⁴ Ibid., 15.

⁶⁵ President William J. Clinton, *A National Security Strategy for A New Century* (Washington DC: White House, May 1997), 4.

⁶⁶ Ibid., 3.

⁶⁷ Ibid., 5.

⁶⁸ Ibid., 6.

⁶⁹ Ibid., 11.

⁷⁰ Ibid., 13.

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current forces,” mostly out of support forces, but also out of combat forces.⁷¹ Next was direction to ensure the Defense Department budget existed within a “constrained environment” as the Clinton administration looked to balance the federal budget.⁷² Not only did those constraints apply to military forces themselves, but to infrastructure as well.⁷³ The legislation that had mandated the QDR also stipulated that the CJCS assess the strategy. In that assessment, the CJCS echoed the call for forces of flexible capability to respond to a variety of situations, and reiterated the need to “balance risk” between near-term requirements and long-term investments.⁷⁴

The NMS, released the same year, naturally reflected the themes of the NSS and QDR, as well as the 1993 Bottom Up Review. The thirteenth CJCS, General John M. Shalikashvili, specifically linked it to the NSS and the QDR, saying the NMS was “based” on those two documents.⁷⁵ In particular, Shalikashvili noted the first objective was to ensure that “no critical region was dominated by a power hostile to the United States and that regions of greatest importance to the US are stable and at peace.”⁷⁶ To achieve that end, Shalikashvili listed four strategic concepts, all of which pointed to responding to a variety of overseas situations rather than one global adversary: Strategic Agility, Overseas Presence, Power Projection, and Decisive Force.⁷⁷ He further accentuated the point about global war, saying its threat “has receded.”⁷⁸ Lastly, the rhetoric in the 1997 NMS mirrored the themes of the NSS and QDR: “Shape the international environment and respond to the full spectrum of crises, while we also prepare now for an uncertain future.”⁷⁹ The NMS did not, however, address the QDR’s direction of reducing the force. There are only oblique hints at it, with references to the use of technology to enhance capability, and direction to the services to maintain readiness for operational taskings while simultaneously “seeking sensible management practices that conserve resources.”⁸⁰

Internal to the Joint Staff, Shalikashvili shaped its planning efforts to mirror his NMS guidance. Memoranda of Policy had become Chairman of the Joint Chiefs of Staff instructions (CJCSIs), and so the MOP-7 of the Powell era

⁷¹ William S. Cohen, *Report of the Quadrennial Defense Review* (Washington, DC: Office of the Secretary of Defense, May 1997), v.

⁷² *Ibid.*

⁷³ *Ibid.*, ix.

⁷⁴ *Ibid.*, 66.

⁷⁵ General John M. Shalikashvili, *National Military Strategy of the United States* (Washington, DC: Office of the Chairman of the Joint Chiefs of Staff, September 1997), 1.

⁷⁶ *Ibid.*, 11.

⁷⁷ *Ibid.*, 3.

⁷⁸ *Ibid.*, 8.

⁷⁹ *Ibid.*, 2.

⁸⁰ *Ibid.*, 24.

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became CJCSI 3100.01 on 1 September 1997.⁸¹ Shalikashvili saw the Joint Staff providing “strategic direction” by “integrat[ing] and synchroniz[ing]” activities across the staff, unified commands, and the services.⁸² He tasked development of plans out to the unified commands, ordering them to develop plans for both contingencies and “peacetime engagement,” reflecting the direction of the president to be more active in global regions. In concert with his guidance about strategic direction, he further ordered the unified commands to submit all their plans to him for review.⁸³

Such guidance necessarily meant competition for resources, particularly as the staff needed to balance forces for major contingencies with requirements to engage in other activities such as peacekeeping, as Shalikashvili indicated in his section of the QDR. Consequently, the chairman implemented a process to review and assess each of the plans. He asserted that “validation” of concepts and plans, particularly ones involving resources from multiple services, needed to occur at the strategic level.⁸⁴ Such concepts and plans, he argued, drove resource programming decisions so that capabilities existed in the field to implement those concepts and plans. As he wrote, “Strategy and programs must be constantly reviewed. . . . The programs complement the strategy and the plans.”⁸⁵ Most importantly, Shalikashvili acknowledged the requirement for a feedback mechanism so that any difference between operational requirements and programmed resources be identified.⁸⁶ He believed that as the military advisor to the president, it was his responsibility to “assess the ability of the NMS to achieve national security objectives [and] assess the ability of strategic and theater plans to accomplish the components of the NMS.”⁸⁷ Thus, the Joint Staff continued the formal assessments begun under Powell. Though the CJCSI referred to them as a “Joint Net Assessment” rather than the Joint Military Net Assessment moniker applied in 1990, the definition and content remained the same.⁸⁸

1999

Two years after the first publication of the CJCSI on joint strategic planning, the Joint Staff published a revised edition. The document reflected the

⁸¹ “Consolidated Index of CJCS Instructions, Manuals, Guides, Handbooks, and Notices,” CJCS Notice 0002, 31 July 2001.

⁸² Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 3100.01, “Joint Strategic Planning System” (Washington, DC: Joint Staff, 1 September 1997), B-1.

⁸³ *Ibid.*, C-1.

⁸⁴ *Ibid.*, D-1–D-2.

⁸⁵ *Ibid.*

⁸⁶ *Ibid.*, D-3.

⁸⁷ *Ibid.*, E-1.

⁸⁸ *Ibid.*, E-5.

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continued decline in overall defense spending that marked the 1990s.⁸⁹ Most significant among its changes was a detailed discussion about the increase in Joint Staff and CJCS oversight of the planning processes in order to balance requirements with limited budgetary resources, as depicted in figure 4.⁹⁰ The introduction clearly signaled that intent by noting that among the advisory functions of the CJCS in statute, his advice on balancing programs and budgets against the requirements of unified commanders would be informed by the Joint Requirements Oversight Committee (JROC) using a process called the “Joint Warfighting Capabilities Assessment (JWCA).”⁹¹

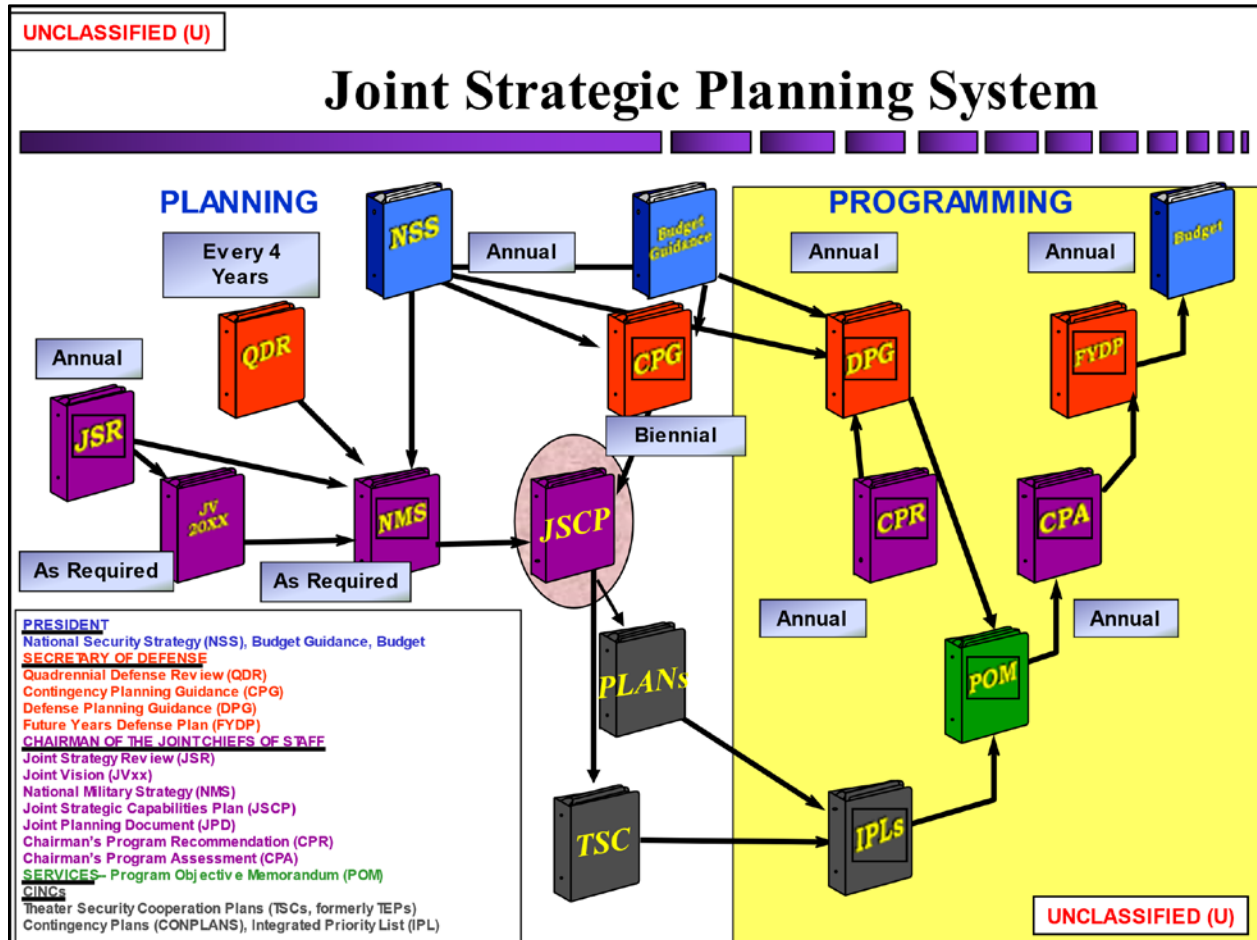


Figure 4. Joint Strategic Planning System, 1999.⁹²

⁸⁹ Office of Management and Budget, *Fiscal Year 2015 Historical Tables Budget of the US Government* (Washington, DC: Government Printing Office, 1 January 2015), 9.

⁹⁰ CJCSI 3100.01A, “Joint Strategic Planning System” (Washington, DC: Joint Staff, 1 September 1999), 2.

⁹¹ *Ibid.*, A-1.

⁹² Presentation, Joint Staff J-5 to Joint Force Education Council, subject; Joint Strategic Capabilities Plan 2002, 10 February 2002.

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The discussion of the planning system as a whole did not differ from previous descriptions. It noted that the CJCS, “in consultation” with service chiefs and unified commanders, would review the national security “environment.” The CJCSI designated the JSCP as the mechanism used by the CJCS to disseminate guidance and apportion resources.⁹³ Again reflecting the budget constraints of the era, the CJCSI cautioned that the strategies and plans developed under the process were “supported by a programmatic system that identifies, budgets, and acquires the capabilities required.”⁹⁴ It went further, saying for the first time in the history of joint strategic planning that

strategies that do not consider technological and fiscal realities or limitations, or fail to take advantage of improvements and breakthroughs, may place the nation at risk. Disconnects between strategy ends and means must be presented to the National Command Authority and brought into balance so that the military’s ability to fight and win our nation’s wars is not compromised.⁹⁵

To address such strategic disconnects, the document outlined the role of the JWCA first mentioned in its introduction. It referred to Section 181 of Title 10, U.S. Code (abbreviated 10 USC §181) and directed that joint requirements and programs be “validated,” an action that was based on collaboration between the unified commanders and JWCA teams “that perform[ed] detailed assessments of programmatic alternatives, tradeoffs, risks, bill-payers, and effectiveness.”⁹⁶ Thus, not only did the 1999 version of the CJCSI continue to note the prominent role of unified commands, it also provided a more formal and detailed process for assessing plans and requirements to stay within budget confines.

Coming on the tail of the new JSPS, Senator James M. Inhofe (R-OK) pushed in April 1999 for a model to articulate levels of risk for the NMS. This proposed requirement was in addition to the CJCS requirement to assess the QDR and was passed into law in section 1033 of the FY2000 NDAA as the Chairman’s Risk Assessment (CRA). The legislation required the CJCS to assess the strategic and military risks associated with executing the missions of the NMS and report annually to the secretary of defense, who then would forward the CRA to Congress. Any risks identified as “significant” would require the secretary to prepare a plan for mitigating such risk, which became known as the Risk Mitigation Plan. General Henry H. Shelton, the fourteenth CJCS, signed out the first CRA to Secretary of Defense William S. Cohen in March 2000.

⁹³ CJCSI 3100.01A, “Joint Strategic Planning System,” A-2.

⁹⁴ *Ibid.*, D-1.

⁹⁵ *Ibid.*

⁹⁶ *Ibid.*, D-2.

2001–2007

Strategic planning during first decade of the twenty-first century confined itself almost solely to the response to the terror attacks of September 11, 2001. Dubbed the “Global War on Terrorism” (GWOT), it grew to include not only combat operations in Afghanistan against the perpetrators of the September 11 attacks but also operations in Iraq, the Horn of Africa, and elsewhere. As one indicator of the all-consuming nature of GWOT, the first NSS produced by the administration of President George W. Bush opened by saying, “the world’s great powers find ourselves on the same side—united by common dangers of terrorist violence and chaos.”⁹⁷ The remainder of the document addressed that threat from a variety of angles. Even the chapter on regional conflict, something that dominated previous versions of the NSS, described those conflicts as potential crucibles for terrorism.

As the GWOT dragged on, the Bush administration produced only one other NSS during its two terms in office, releasing its second NSS in 2006. Just by its opening two sentences, the 2006 NSS continued to reflect the near-singular focus on GWOT, saying the primary threat facing the United States was “terrorism, fueled by an aggressive ideology of hatred and murder.”⁹⁸ Like the 2002 NSS, the chapter addressing regional conflicts tied them to terrorist groups, stating such conflicts provided fertile ground for such groups to operate and gain followers.⁹⁹

Within the Defense Department, the 2001 QDR naturally repeated the focus on GWOT, but also introduced a fundamental shift in strategic planning. Secretary of Defense Donald H. Rumsfeld declared that instead of developing plans and resources to combat a particular threat, the department instead would develop capabilities to confront the methods and tools used by a potentially wide variety of adversaries.¹⁰⁰ Given the terrorist attacks on American soil on September 11, the QDR not surprisingly linked its mantra of “capabilities-based” planning to the asymmetric threat posed by violent extremist organizations. In addition, it continued the theme of potential regional threats emanating from more traditional actors.¹⁰¹ Moreover, it highlighted the problems incurred from the budget reductions of the previous decade, indicating the military needed to constantly balance what forces and

⁹⁷ President George W. Bush, *The National Security Strategy of the United States of America* (Washington, DC: White House, September 2002), i.

⁹⁸ President George W. Bush, *The National Security Strategy of the United States* (Washington, DC: White House, March 2006), i.

⁹⁹ *Ibid.*, 14.

¹⁰⁰ Donald H. Rumsfeld, *Quadrennial Defense Review Report* (Washington, DC: Department of Defense, 30 September 2001), iv.

¹⁰¹ *Ibid.*, 4.

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capabilities it maintained against evolving threats, particularly those in the asymmetric arena.¹⁰²

In October 2002, Secretary Rumsfeld ordered a change that affected the nomenclature for the unified commands. He decreed that the department no longer would refer to commanders of unified commands as “commander in chief” of their particular command, since that title belonged only to the president. As such, he elaborated their new title would be “commander” followed by the name of their particular command, such as Commander, US Northern Command.¹⁰³ Because the commands had been known alternatively as “combatant commands” since the 1958 Department of Defense Reorganization Act, it followed from Rumsfeld’s order that the commanders of such entities became known as “combatant commanders.” Moreover, such a change also emphasized the more prominent role of the commands as the operational component of the department.

The only NMS produced during this time frame dated from 2004. It too reflected the all-consuming narrative of the time. General Richard B. Myers, the fifteenth chairman, opened the document by saying the first priority of the military was to prevail in the GWOT.¹⁰⁴ But Myers also acknowledged the existence of a panoply of other threats, from traditional state actors to nonstate actors in possession of weapons of mass destruction.¹⁰⁵ These threats, he argued, challenged the United States across a variety of domains, necessitating a force more agile and more capable of responding to a variety of scenarios and threats.¹⁰⁶ As such, Myers advocated a recapitalization of capabilities expended by the GWOT as well as an investment in a wide range of future capabilities.¹⁰⁷ However, he did set the stage for later efforts toward global integration by concluding that one of the tasks of the military would be to “reduce seams between combatant commands.”¹⁰⁸ While the document still contained the emphasis on the combatant commands, Myers’s words acknowledged a growing recognition that countering some threats would require more than a theater-level view. Reflecting that recognition was the Joint Staff’s National Military Strategic Plan for Combatting Terrorism, which was operationalized through a global war plan for GWOT, Concept Plan (CONPLAN) 7500. But the Joint Staff and combatant commands were uneasy with US Special Operations Command (USSOCOM) being given overall responsibility for executing the CONPLAN. Instead, the Joint Staff named USSOCOM as the plan’s “global

¹⁰² Ibid., 9.

¹⁰³ Donald H. Rumsfeld, Memorandum, “The Title Commander in Chief,” 24 October 2002.

¹⁰⁴ General Richard B. Myers, *The National Military Strategy of the United States of America* (Washington, DC: Joint Staff, March 2004), iv.

¹⁰⁵ Ibid., 3.

¹⁰⁶ Ibid., 6.

¹⁰⁷ Ibid.

¹⁰⁸ Ibid., 27.

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synchronizer” to give it license to coordinate actions across combatant commands, without actual command (i.e., directive) authority. In theory, USSOCOM was to review the regional war on terror plans produced by the geographic combatant commands to support the CONPLAN. In practice, this arrangement did not work, leaving resentment between USSOCOM and the other combatant commands on the role of a “synchronizer.”¹⁰⁹

In 2005, Rumsfeld issued the first National Defense Strategy (NDS), which expanded on the 2001 QDR to lay out an approach to the challenges outlined in the NSS and the broad methods by which the department would address those challenges. It laid out the priority missions for the department and continued the direction to protect the homeland even during the GWOT while continuing transformation and a capabilities-based approach to contingency and force planning.¹¹⁰ New in the 2005 NDS was a framework for assessing threats that divided up challenges into four categories: traditional, irregular, catastrophic, and disruptive. While the first two were relatively straightforward, catastrophic threats involved the use of weapons of mass destruction or effect, while disruptive challenges involved the use of technologies “to negate current US advantages in key operational domains.”¹¹¹

The 2006 QDR that followed shortly thereafter expanded on the 2005 NDS and its structures, focusing on a number of defense policy goals overlaid on the framework of challenges described in the previous document. Rather than a singular focus on the GWOT and its irregular threats that had characterized post-9/11 works, the QDR continued the pursuit of capabilities against a wider range of challenges, beyond traditional warfare to include irregular warfare, catastrophic terrorism, and disruptive threats, shown in figure 5.¹¹² To address those challenges, the QDR outlined four ways for its defense strategy, listed as “priority areas for examination:” defeating terrorist networks, defending the homeland in depth, shaping the choices of countries at strategic crossroads, and preventing hostile states and nonstate actors from acquiring or using weapons of mass destruction.¹¹³

¹⁰⁹ Colonel Francis J. H. Park, former chief, Strategy Development Division, Joint Staff J-5, interview with Christopher D. Holmes, 5 June 2020.

¹¹⁰ Donald H. Rumsfeld, *The National Defense Strategy of the United States of America* (Washington, DC: Department of Defense, March 2005), iv.

¹¹¹ *Ibid.*, 2.

¹¹² Donald H. Rumsfeld, *Quadrennial Defense Review Report* (Washington, DC: Department of Defense, 6 February 2006), 3.

¹¹³ *Ibid.*, 19.

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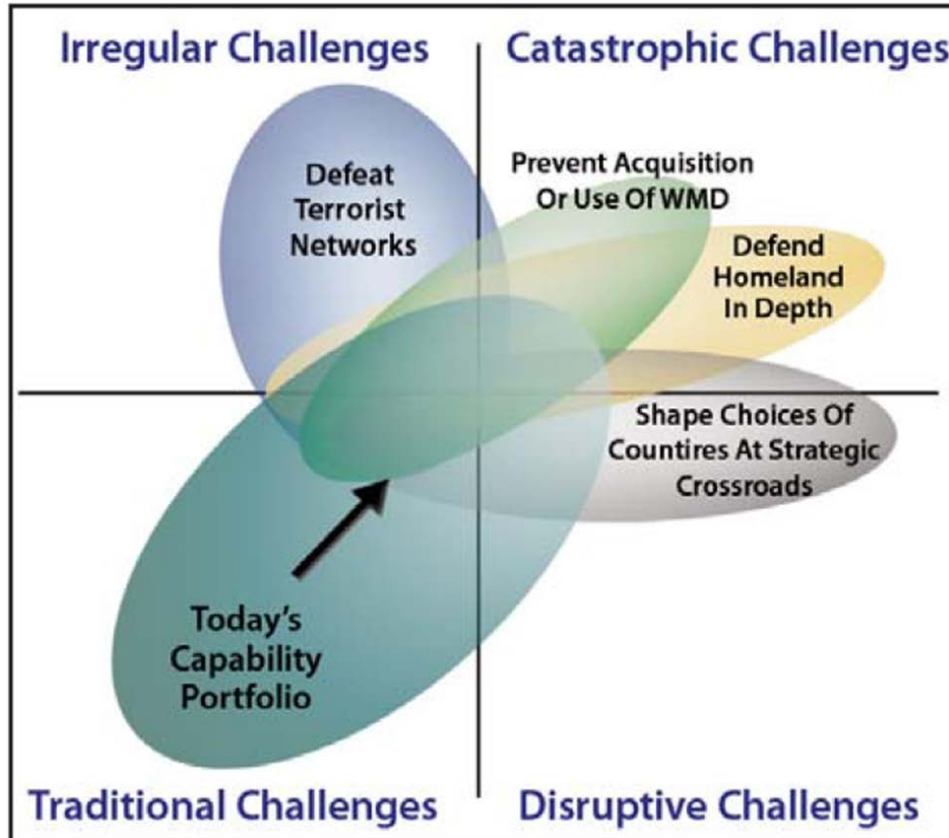


Figure 5. 2006 QDR Challenges.¹¹⁴

The force-sizing construct in the 2006 QDR acknowledged the demand imposed by Operations ENDURING FREEDOM and IRAQI FREEDOM, and binned forces against homeland defense, “War on Terror/Irregular (Asymmetric) Warfare,” and conventional campaigns. It also marked a distinct shift away from the “win decisively” or “swiftly defeat the enemy” language that had characterized the defense strategies of the 1990s.¹¹⁵

Parallel to the development of strategic guidance was the resourcing of the expanding number of conflicts that greatly increased demand on the force. In the wake of the upcoming rotation of forces for Operation IRAQI FREEDOM in summer 2003, Rumsfeld became increasingly dissatisfied with the execution of the joint force provider function, nominally assigned to US Joint Forces Command (USJFCOM). In execution, responsibility split to combatant commanders for assigned forces, the services for nonapportioned and reserve component forces, and to USJFCOM for all others.¹¹⁶ The result was a system called Global Force Management (GFM) that centralized force apportionment,

¹¹⁴ Ibid., 19.

¹¹⁵ Ibid., 36–39.

¹¹⁶ Donald H. Rumsfeld, memorandum to Gen. Richard Myers, “Force Provider,” 9 June 2003.

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assignment, and allocation decisions through the commander of USJFCOM as the joint force provider. Although USJFCOM was responsible for recommending sourcing solutions to the secretary of defense, the Joint Staff assessed the risk of those recommendations and developed risk mitigation options prior to forwarding those recommendations to the secretary for decision.¹¹⁷

The assessment of risk required a formal methodology, which first saw informal development between the combatant commands and services in 2005 and promulgation within the Joint Staff in 2007 and represented the first definitions of risk to guide reporting from the combatant commands and the services.¹¹⁸ That methodology saw informal use for another decade until the Joint Staff formally published it in October 2016 as CJCS Manual 3105.01, *Joint Risk Analysis*. In the absence of any formalized doctrine for strategic risk assessment, that methodology has effectively become the standard across the joint force.

Up to 2006, the secretary's operational and programmatic guidance to the joint force was built around several documents (figure 6). Prior to the emergence of the NDS, operational guidance was delivered through a departmental Security Cooperation Guidance and the presidentially signed Contingency Planning Guidance. Programmatic guidance was divided between the Department of Defense Strategic Planning Guidance and, after the chairman's military advice, the Joint Programming Guidance (JPG).

¹¹⁷ Donald H. Rumsfeld, *Global Force Management Implementation Guidance 2005*, (Washington, DC: Office of the Secretary of Defense, 4 May 2005), I-1-I-4. (S//NF, portions used are U)

¹¹⁸ Final Draft, Supplement 1 to Chairman of the Joint Chiefs of Staff Instruction 3100.01C, Joint Risk Assessment System (Washington, DC: Joint Staff, 30 May 2015), 2.

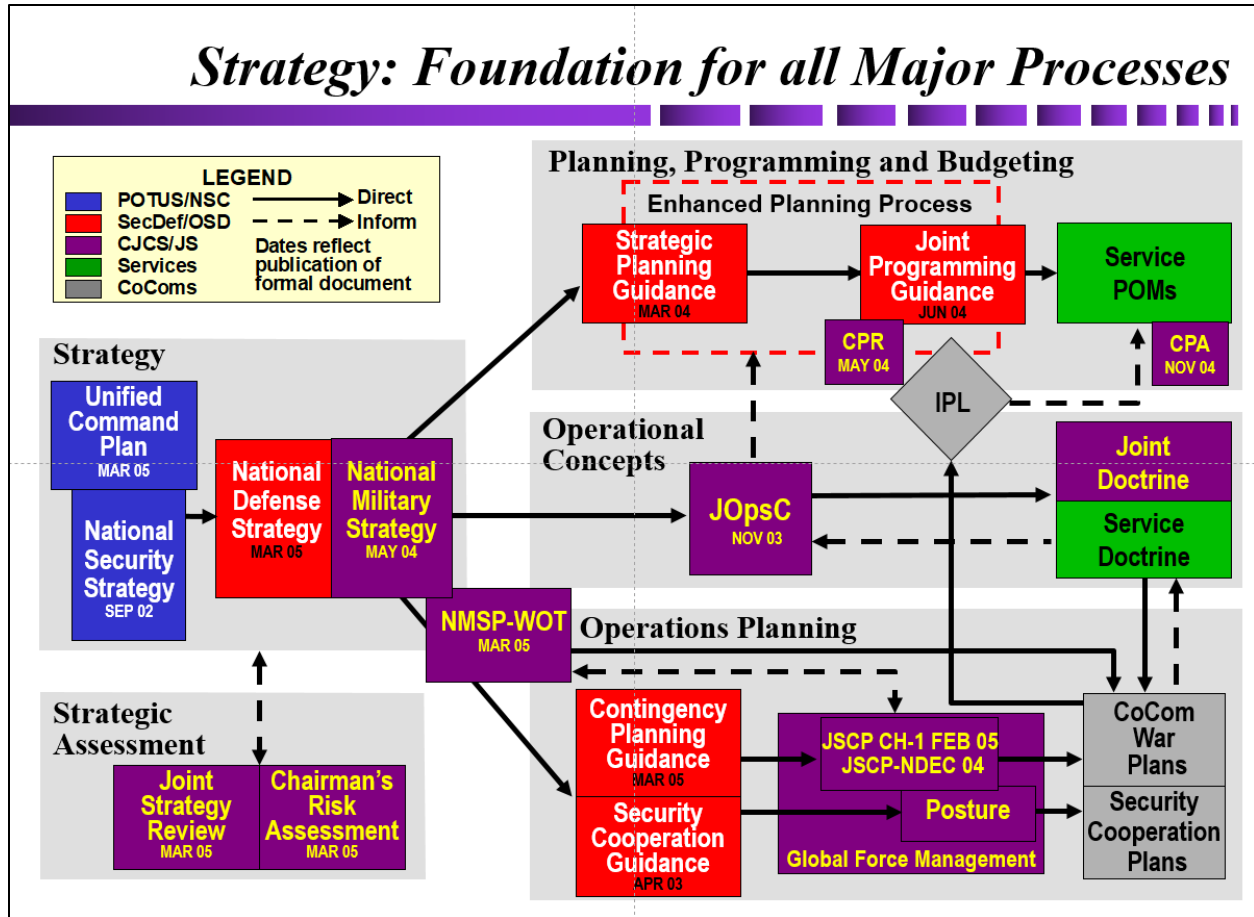


Figure 6. Strategic Documents Relationship in 2005, prior to Creation of the Guidance for Employment of the Force.¹¹⁹

In 2006, those documents were combined into two unitary guidance documents. The previous security cooperation guidance and contingency planning guidance were merged into the Guidance for Employment of the Force (GEF). The GEF also included guidance for global posture, nuclear weapons, and global force management and added guidance for campaign planning so that combatant commands had guidance for day-to-day operations that filled in the gap between security cooperation and contingency planning. For programmatic guidance, although the JPG remained, the former Department of Defense Strategic Planning Guidance was replaced with the Guidance for Development of the Force (GDF). In addition to the former strategic planning guidance, the GDF incorporated guidance for defense transformation, joint concepts and experimentation, science and technology, and human capital.¹²⁰ While the streamlining of guidance may have reduced the number of secretary-

¹¹⁹ Lieutenant Colonel Michael S. Bell, slide presentation, Strategic Overview and the National Military Strategy of the United States of America, Joint Staff J-5, 11 January 2005.

¹²⁰ Presentation slides, Description of the Joint Strategic Planning System, Joint Staff J-5, July 2009.

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approved documents driving joint strategic planning, the downstream documents within the JSPS remained the same.

2008

The next change to the CJCSI on Joint Strategic Planning occurred in 2008. The 2008 variant of the CJCSI reflected growing tensions between limited budgets, the tremendous burden of fighting the GWOT, and preparation to address a number of complex challenges in the future. As such, it represented a total overhaul of the JSPS. Indeed, in the description of changes from the 1999 version, the introduction noted the 2008 version was a “complete revision” to provide an “integrated assessment, advice, and direction system,” signaling an intent to reconcile the tensions.¹²¹ Most significantly, the number of enumerated statutory responsibilities of the CJCS grew from four in 1999 (validated as current in 2003) to twenty-three, with eight of those twenty-three addressing review or assessment and only two specifically addressed to planning.¹²² Not only did this reflect a need to balance requirements against limited budgets, but it also illustrated the continued prominence of the combatant commands, with the CJCS serving as their “spokesman,” particularly when it came to their operational needs.¹²³ In fact, the wording of the CJCSI reinforced the prominent role of the combatant commands, saying that it was the combatant commands who prepared assessments “that cut across missions, domains, functions, and time,” with those assessments forming the basis of the advice CJCS provided to the secretary of defense.¹²⁴

Moreover, the CJCSI devoted an entire enclosure just to assessments, further reflecting the chairman’s attempt to wrestle with not only the sheer number of legal responsibilities, but also with the risks posed by disparate external threats and budget and resource constraints.¹²⁵ The CJCSI also formalized the Comprehensive Joint Assessment (CJA), which had been introduced in the informal risk methodology two years prior. As defined, the CJA was a “formal holistic strategic assessment process that . . . provides a central unified mechanism for combatant commands and Services” to describe their environments, from threats to counters, from current state to desired outcomes.¹²⁶ To link the CJA with Joint Staff estimates, the CJCSI formally outlined the Joint Strategy Review (JSR) process. While a JSR report had been prepared internally for the J-5 as far back as 1993, the JSR process became an umbrella for the strategic assessments of the CRA and for program advice

¹²¹ CJCSI 3100.01B, “Joint Strategic Planning System” (Washington, DC: Joint Staff, 15 October 2008), 2.

¹²² *Ibid.*, A-1–A-2.

¹²³ *Ibid.*

¹²⁴ *Ibid.*, A-5.

¹²⁵ *Ibid.*, B-1.

¹²⁶ *Ibid.*, A-6.

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prepared by the Joint Staff J-8 in the form of the Capabilities Gap Analysis and the Chairman's Program Recommendation. For employment of the force, the CJCSI outlined the Joint Combat Capability Assessment (JCCA), which drew from the Chairman's Readiness System and other near-term assessments of assigned missions and operational plans.¹²⁷ The establishment of the JSR and JCCA processes provided for the first time a formal CJCS appraisal of the joint force's strategy, capabilities, and readiness against the NMS requirements throughout the entire duration of the future years defense program. Such an appraisal articulated to the secretary of defense and to Congress the full "nature and magnitude" of overall military risk.¹²⁸ To manage such a gargantuan and complex process, the CJCSI established three levels of strategic planning working groups on the Joint Staff: one at the action officer level, a second at the next higher staff echelon of division chief, and a third at the three-star director level.¹²⁹

The 2008 revision of the instruction also formally introduced the GFM process and its documents as part of the JSPS. The CJCSI defined GFM as a process to "integrate force apportionment, allocation, and assignment" to support strategic guidance, particularly as issued in the secretary of defense's GEF.¹³⁰ As described, GFM would provide senior defense leaders an enhanced insight into the global availability of forces and "enable the services and Joint Chiefs to better manage assigned and allocated force availability"¹³¹

Also released that year was a revision of the NDS. The 2008 NDS was the first one published under Robert M. Gates as secretary of defense. In comparison to documents issued under Rumsfeld, the Gates NDS alluded to the War on Terror, but broadened the perceived threat by assessing that "for the foreseeable future, this environment will be defined by a global struggle against a violent extremist ideology that seeks to overturn the international state system." While other irregular challenges, rogue state pursuit of nuclear weapons, and the military resurgence of other states received mention—requiring some ability for the department to address uncertainty and unforeseen challenges—the 2008 NDS was a clear statement that the focus of the department was to win the wars it was in.¹³²

Further complicating matters was the introduction of top-down guidance from the secretary of defense. The secretary's GEF provided desired strategic end states by theater or by function and consolidated several previous

¹²⁷ Ibid., A-6–A-7; Richard Meinhart, *Strategic Planning by the Chairmen, Joint Chiefs of Staff* (Carlisle Barracks, PA: Strategic Studies Institute, April 2006), 11.

¹²⁸ CJCSI 3100.01B, "Joint Strategic Planning System," B-8.

¹²⁹ Ibid., F-1.

¹³⁰ Ibid., B-9.

¹³¹ Ibid.

¹³² Robert M. Gates, *2008 National Defense Strategy* (Washington, DC: Department of Defense, June 2008), 2-5.

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guidance documents.¹³³ The secretary further directed the CJCS to combine instructions from the GEF, within the context of the NMS into the JSCP, which then was promulgated to combatant commanders, as shown in the following figures.

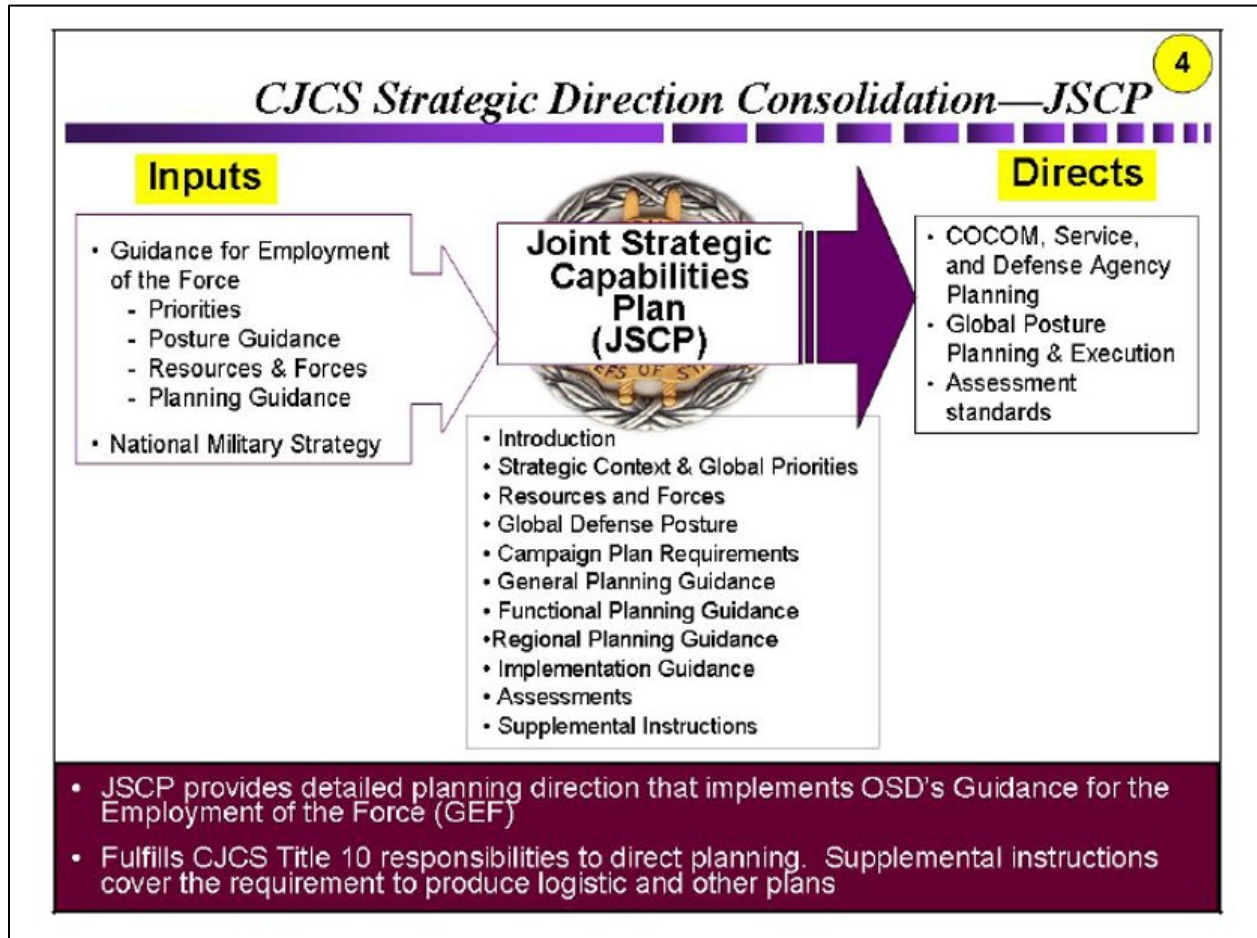


Figure 7. Joint Strategic Capabilities Plan in 2008 JSPS.¹³⁴

¹³³ CJCSI 3100.01B, "Joint Strategic Planning System," D-6.

¹³⁴ Ibid., D-4.



Figure 8. Relationship of Guidance to Plans in 2008 JSPS.¹³⁵

The assessments the CJCS wrestled with derived from that input process, since they were the feedback mechanism of how the joint force was able to meet its taskings. Thus, the CJCSI revealed the staggering complexity of requirements imposed upon CJCS, from top-down guidance with the GEF to the assessments developed in order to not only provide feedback on mission accomplishment but also to comply with congressionally mandated guidelines. It is little wonder, then, that time frame witnessed little in the way of long-term strategic planning by the Joint Staff, as its entire energy was consumed by the here-and-now pressures of GWOT in addition to the myriad of reports and reviews.

2010–2014

The next two editions of the QDR sounded a caution about the changed dynamic in the international defense environment that in turn necessitated a change within the Defense Department. Secretary of Defense Gates wrote in the

¹³⁵ Ibid., figure 9, D-6.

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2010 QDR about the emergence of globalization and its impact, saying it provided both state and nonstate actors increased access to technology and information conduits that in turn enhanced their capabilities and thereby created increased threats for the United States.¹³⁶ Consistent with his previous guidance in the 2008 NDS, he acknowledged nonetheless that despite such threatening potential, the first priority for American military forces was to “prevail” in GWOT.¹³⁷ Looming on the horizon, though, were “global challenges,” the first time such a description was used.¹³⁸ To confront such challenges, Gates discussed the requirement for American military forces to operate and succeed across a “wide geographic and operational spectrum.”¹³⁹ The chairman’s chapter echoed those themes, pointing out a need to balance “global” risk and the consequent need for a “globally engaged” force, beyond simply combatting terrorism.¹⁴⁰

The consolidation of guidance that had occurred with the creation of the GDF continued in 2010. Up to that year, the department had developed two-year budgets, thus leading to the term “years of execution” during the years in which money was actually being spent against obligations. In a 2010 memo, Deputy Secretary of Defense William J. Lynn III directed a move from two-year budgets to single-year budgets. That memo also directed a consolidation of the GDF and JPG into a unitary Defense Planning and Programming Guidance. That document would be later renamed the Defense Planning Guidance, returning to the title it had held immediately after the Cold War but retaining its purpose.¹⁴¹

In lieu of an NDS, as had been published in between the previous three QDRs, the Defense Department published a strategy document titled *Sustaining U.S. Global Leadership: Priorities for 21st Century Defense*, signed by President Barack H. Obama. Replacing Gates as secretary was Leon E. Panetta, and his strategy document, more commonly called the Defense Strategic Guidance (DSG), reflected a view, coming after the conclusion of Operation NEW DAWN in Iraq and the announcement of the end of Operation ENDURING FREEDOM in Afghanistan in 2014, that “we must put our fiscal house in order here at home and renew our long term economic strength.”¹⁴² The budgetary

¹³⁶ Robert M. Gates, *Quadrennial Defense Review Report* (Washington, DC: Department of Defense, February 2010), iii.

¹³⁷ *Ibid.*, 2.

¹³⁸ *Ibid.*, 5.

¹³⁹ *Ibid.*, 7.

¹⁴⁰ *Ibid.*, 104.

¹⁴¹ Memo, William J. Lynn III, subject: Procedures and Schedule for Fiscal Year (FY) 2012–2016 Integrated Program/Budget Review, Office of the Secretary of Defense, 9 April 2010; Major Ryan M. Harrell, master’s thesis, “Decision-Grade: Readiness, Mission Impacts, and Classified Data in the Defense Budgeting Process,” (Maxwell Air Force Base, AL: Air Command and Staff College, October 2015), 9.

¹⁴² Barack H. Obama, *Sustaining U.S. Global Leadership: Priorities for 21st Century Defense* (Washington, DC: Department of Defense, January 2012), president’s cover letter.

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focus of the DSG clearly marked its assumption of a peace dividend and a commensurate effect on the defense strategy.

The policy focus of the DSG shifted away from the 2008 NDS and its focus on winning the current wars toward a “rebalance toward the Asia-Pacific Region.” Bolstering this rebalance was an explicit tie to economic and security interests in the Pacific, as well as acknowledgement of China’s emergence as a regional power. Of note was a new primary mission for the military: to “project power despite anti-access/area denial challenges,” language aimed specifically at China and Iran. Conversely, while “conduct stability and counterinsurgency operations” remained a mission, it contained a caveat such that “U.S. forces will no longer be sized to conduct large-scale prolonged stability operations,” an unmistakable reference to Operations IRAQI FREEDOM and ENDURING FREEDOM.¹⁴³

The two places where this focus was most apparent were the priority missions for the Defense Department and their force-sizing construct. The 2010 QDR had continued the previous force-sizing construct of fighting and winning two major regional conflicts in overlapping time frames.¹⁴⁴ The 2012 DSG reduced this to “detering and defeating aggression by an opportunistic adversary in one region even when our forces are committed to a large-scale operation elsewhere” while “denying the objectives of—or imposing unacceptable costs on—an opportunistic aggressor in a second region.”¹⁴⁵ That change, attributed to Vice Chairman Admiral James A. Winnefeld Jr, was a significant shift away from the strategic ambiguity that had characterized previous defense strategies, but it reflected the assumption that Iraq, Afghanistan, and Eastern Europe would remain benign during the foreseeable future.

Domestically, fiscal challenges remained a pressing issue coming after the 2008 recession and the 2011 debt-ceiling crisis. In response to the sequestration provisions of the 2011 Budget Control Act, which threatened to apply \$1.2 trillion in cuts to both mandatory and discretionary spending across the federal budget, Secretary of Defense Charles T. “Chuck” Hagel announced the Strategic Choices and Management Review (SCMR) in March 2013. The SCMR followed the guidance in the DSG to cut funding under the threat of sequestration-level cuts.¹⁴⁶ The SCMR found some economies that weighed heaviest on the Army and Air Force, albeit within the bounds of the DSG’s

¹⁴³ Ibid., 2-6.

¹⁴⁴ Gates, *Quadrennial Defense Review Report*, 42.

¹⁴⁵ Obama, *Sustaining U.S. Global Leadership*, 4; Raphael S. Cohen, *The History and Politics of Defense Reviews* (Santa Monica, CA: RAND, 2018), 38,

¹⁴⁶ Jim Garamone, “Hagel Tasks Civilian, Military Leaders to Examine Strategy,” American Forces Press Service, 18 March 2018, <https://archive.defense.gov/news/newsarticle.aspx?id=119557>.

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defense strategy. More pointedly, its analysis both overlapped and set the tone for the upcoming QDR.¹⁴⁷

In the 2014 QDR, Hagel addressed the furtherance of those trends and the threats they posed. He opened by warning of “unprecedented levels of global connectedness” that fostered both friendly and hostile behaviors.¹⁴⁸ He went on to address the need for the force to “rebalance” to counter a variety of threats—not just terrorists—and that required a “global” posture.¹⁴⁹ Hagel outlined a number of threats facing the United States, among them China, North Korea, Muslim sectarian conflict in the Middle East, ungoverned space in Africa, and Russia, as well as both state and nonstate actors.¹⁵⁰

However, the context for the 2014 QDR remained the budget uncertainty that had characterized the Budget Control Act and the SCMR. The 2014 QDR outlined a stark prospect for the defense budget, which was \$115 billion over the sequestration-level cuts, an adjustment of over 20 percent when considered against the \$495.6 billion budget request that year. The QDR plainly expressed that enacting sequestration-level cuts would render the department unable to implement the defense strategy, in essence leaving little if any choice to Congress or the president.¹⁵¹

To confront the strategic and fiscal environment, Hagel expressed the need for new “presence paradigms” for American military force abroad.¹⁵² Hagel also acknowledged the drain the GWOT imposed on force structure and budgets, saying that in an “environment of constrained resources,” the Defense Department needed to better balance its commitments.¹⁵³ In his chapter of the QDR, the chairman noted that American “responsibilities as a global power” needed to be balanced against the stringent fiscal constraints imposed by sequestration, necessitating a new approach to planning.

A central framework for strategic prioritization for the SCMR, development of the 2014 QDR, and the Joint Staff’s own military advice during

¹⁴⁷ Charles T. Hagel, Statement on Strategic Choices and Management Review 31 July 2013, <https://archive.defense.gov/Speeches/Speech.aspx?SpeechID=1798>; Marvin Kalb, Michael O’Hanlon, Mackenzie Eaglen, panel discussion, “Dissecting the Pentagon’s Strategic Choices and Management Review,” Washington, DC: Brookings, 6 August 2013, https://www.brookings.edu/wp-content/uploads/2013/08/20130806_defense_budget_transcript.pdf.

¹⁴⁸ Charles T. Hagel, *Quadrennial Defense Review* (Washington, DC: Department of Defense, 4 March 2014), iii.

¹⁴⁹ *Ibid.*, vii–viii.

¹⁵⁰ *Ibid.*, 4–6

¹⁵¹ Office of the Under Secretary of Defense (Comptroller)/Chief Financial Officer, *United States Department of Defense 2015 Fiscal Budget Request Overview* (Washington, DC: Department of Defense, March 2014), 1-1; Hagel, *Quadrennial Defense Review*, iv, xiii–xiv.

¹⁵² Hagel, *Quadrennial Defense Review*, 23.

¹⁵³ *Ibid.*, 34.

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this period was Winnefeld's set of six national security interests (NSIs): the survival of the nation; the prevention of catastrophic attack against US territory; the security of the global economic system; the security, confidence, and reliability of our allies; the protection of American citizens abroad; and the preservation and extension of universal values.¹⁵⁴ The punishing focus on budget cuts placed a premium on prioritization, and the tradeoffs that would come with them. They fit well within the programmatic and policy focus of the DSG and QDR, and the chairman's chapter of the QDR also marked their first public rollout. Those interests had formed the basis for strategic assessment in the 2013 CRA and marked the ends for the strategy.¹⁵⁵

The 2014 QDR would be the last one. In a 4 March 2014 press release, Chairman of the House Armed Services Committee Howard P. "Buck" McKeon (R-California) rejected the report. In a press release, McKeon minced no words:

Unfortunately, the product the process produced this time has more to do with politics than policy and is of little value to decision makers. For that reason, I will require the Department to re-write and re-submit a compliant report. In defiance of the law, this QDR provides no insight into what a moderate-to-low risk strategy would be, is clearly budget driven, and is shortsighted. It allows the President to duck the consequences of the deep defense cuts he has advocated and leaves us all wondering what the true future costs of those cuts will be.¹⁵⁶

Deputy Under Secretary of Defense for Strategy, Plans, and Force Development Christine Wormuth pushed back several days later at a panel at the Center for Strategic and International Studies, saying, "Being a global leader does not come cheap . . . you can't live in a mansion if you're working on a middle-class salary." At stake was what would be considered a public statement of acceptable risk, which the chairman echoed in his "higher risk" assessment of the QDR.¹⁵⁷

Section 1072 of the 2015 NDAA, passed on 19 December 2014 as Public Law 113-291, amended the provisions for the QDR in 10 USC §118 to replace it with a document called the Defense Strategy Review. In essence, the Defense Strategy Review was to replace the QDR, but it never came to fruition as

¹⁵⁴ Ibid., 60

¹⁵⁵ Ibid., 59–60.

¹⁵⁶ House Armed Services Committee, press release, "Chairman McKeon Rejects QDR," (Congress, House of Representatives, 4 April 2014), <https://republicans-armedservices.house.gov/news/press-releases/chairman-mckeon-rejects-qdr>.

¹⁵⁷ Zach Noble, "DOD's Wormuth Smacks Down QDR Criticism," *Washington Technology*, 11 March 2014, <https://washingtontechnology.com/articles/2014/03/11/csis-wormuth.aspx>; Hagel, *Quadrennial Defense Review*, 62–63.

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Section 941 of the 2017 NDAA, passed on 23 December 2016, replaced 10 USC §118 in its entirety and replaced it with an NDS.

2015

In the NSS issued by Obama in 2015, one sees furtherance of the themes discussed by his defense secretaries. Obama opened his NSS by saying the United States had “moved beyond” the wars in Iraq and Afghanistan that so preoccupied the previous decade.¹⁵⁸ Instead, he argued the country needed to pivot toward “escalating challenges” from around the globe, particularly from Russia, which he called out specifically.¹⁵⁹ Obama also repeatedly noted how the world had become increasingly “interconnected” and, as such, that necessitated not only American leadership, but American partnership with an assortment of countries.¹⁶⁰ He further mentioned the need for a “global security posture” and “collective action” to address the challenges.¹⁶¹

Not surprisingly, the NMS issued that same year reflected those same themes. The eighteenth CJCS, General Martin E. Dempsey, described his strategy as one that addressed “the need to counter revisionist states that are challenging international norms as well as violent extremist organizations . . . that are undermining transregional security.”¹⁶² He discussed how the United States faced “multiple, simultaneous security challenges from traditional state actors and transregional networks of sub-state groups—all taking advantage of rapid technological change.”¹⁶³ More importantly, Dempsey noted that the military could not focus on countering one threat while downplaying or ignoring others.¹⁶⁴ Winnefeld’s NSIs continued in their most refined form in the 2015 NMS. With these NSIs, Dempsey believed the military could apply its efforts across “multiple regions, deter[ing] aggression and assur[ing] allies.”¹⁶⁵ To maximize the effectiveness of such efforts, one of Dempsey’s desired end states included “globally integrated operations” that synchronized and deconflicted various responses to the NSIs, borrowing from the title of the 2012 Capstone Concept for Joint Operations, which was Dempsey’s vision document for the joint force beyond the budget years.¹⁶⁶

The JSPS instruction issued in 2015 reflected this new understanding of threats. It retained the detailed discussion of the CJCS’s statutory

¹⁵⁸ President Barack H. Obama, *National Security Strategy* (Washington, DC: White House, February 2015), i.

¹⁵⁹ *Ibid.*

¹⁶⁰ *Ibid.*, 3.

¹⁶¹ *Ibid.*, 7.

¹⁶² General Martin E. Dempsey, *The National Military Strategy of the United States of America* (Washington, DC: The Joint Staff, 2015), 1.

¹⁶³ *Ibid.*, i.

¹⁶⁴ *Ibid.*, 3.

¹⁶⁵ *Ibid.*, 5–6.

¹⁶⁶ *Ibid.*, 10.

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responsibilities for assessments but also attempted to redefine the inputs for those assessments. Rather than a lengthy list of statutory tasks, the 2015 CJCSI divided them in four categories, with tasks aligned accordingly as laid out in figure 9:

- Assess (5 tasks; 14 products)
- Advise (9 tasks; 14 products, with some double-tasked with Assess)
- Direct (5 tasks; 4 products, with 1 double-tasked with Assess)
- Execute (7 tasks; 4 products, with 1 double-tasked with Direct, and 1 double-tasked with Advise)¹⁶⁷

It also retained the definition of the CJA from 2008. In this iteration, the staff defined the CJA as consisting of five parts. None of these was a broad strategic overview but instead reflected combatant command inputs, such as “CCMD Campaign and Contingency Plan Assessments and Service Force Generation and Management Assessments,” “CCMD and Service Prioritized Risk Drivers and Mitigation,” and “CCDR Integrated Priority Lists.”¹⁶⁸

¹⁶⁷ CJCSI 3100.01C, “Joint Strategic Planning System” (Washington, DC: Joint Staff, 20 November 2015), A-2 – A-7.

¹⁶⁸ *Ibid.*, B-2.

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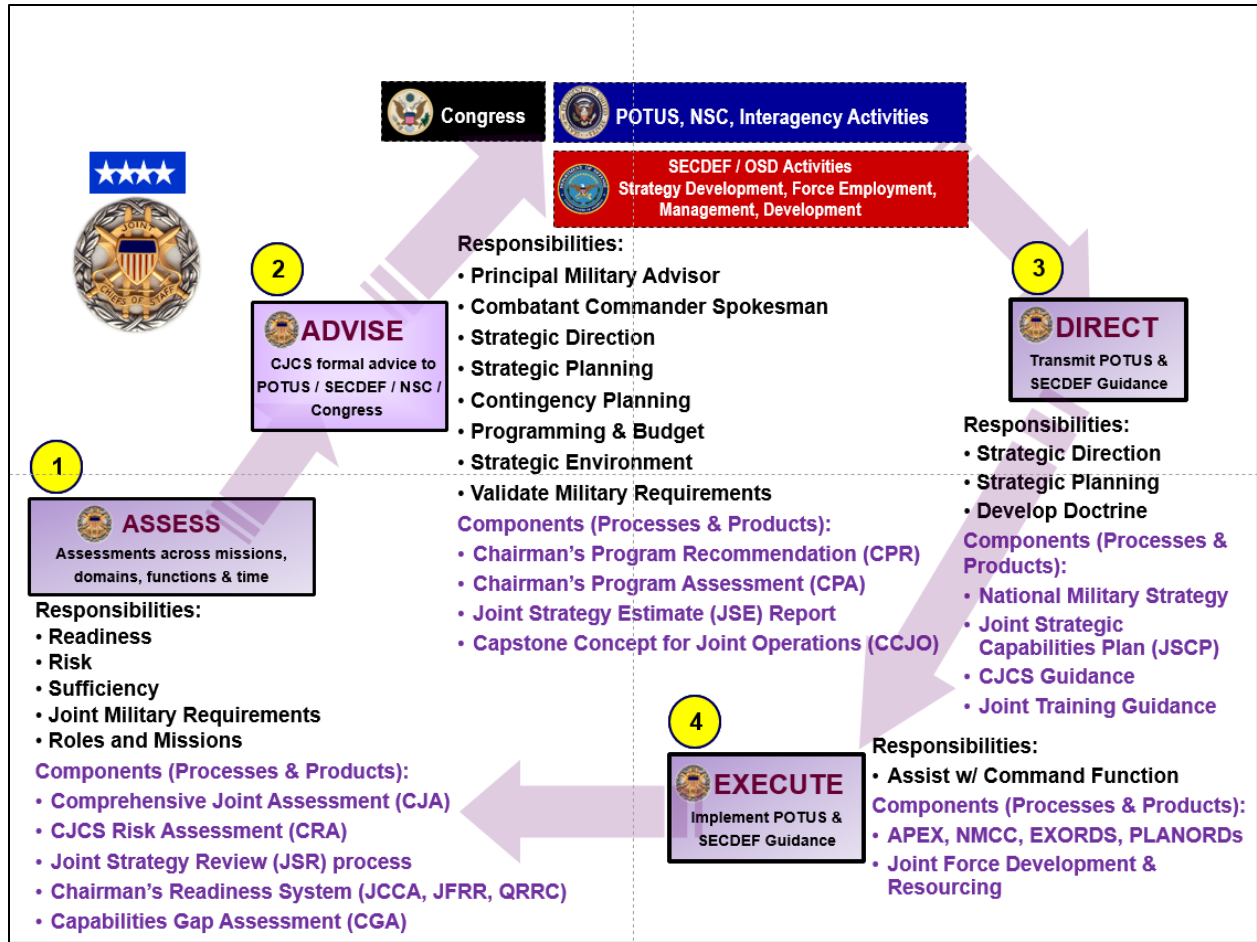


Figure 9. Chairman’s Statutory Roles, Responsibilities, and Associated Components in 2015 JSPS.¹⁶⁹

The relationship of the documents in the JSPS to other guidance signed by the president or secretary remained largely the same within the chairman’s broad statutory roles, changing more specific names of processes to more general treatments of activity, specifically to force employment, force management, force development, and strategic assessment, as depicted in figure 10.

¹⁶⁹ CJCSI 3100.01C, “Joint Strategic Planning System,” A-1.

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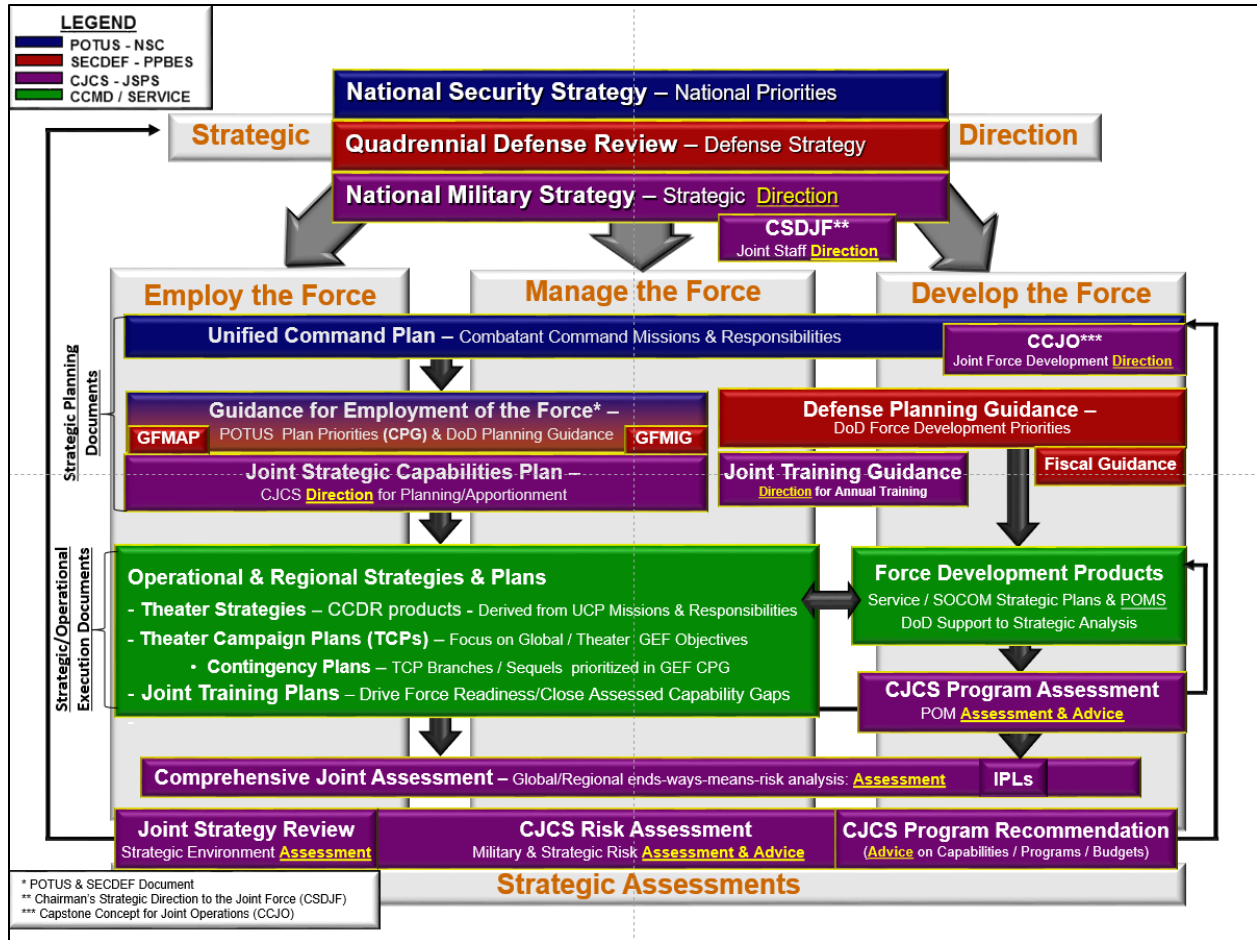


Figure 10. National, DoD, and Joint Component Correlation within the 2015 JSPS.¹⁷⁰

Additionally, the instruction retained the working groups from before, all designed to assist with the CJCS’s assessment responsibility. The director-level group continued to exist, as did the one at the division chief level. In an emerging recognition of the global nature of threats outlined in the NSS and NMS, the action officer-level group was subsumed into a larger group dubbed the Joint Staff Strategy Integration Group (JSSIG). The JSSIG consisted of action officers from across the Joint Staff whose role was to collaborate on cross-cutting JSPS-related items.¹⁷¹

Thus, while the instruction reflected a continuity of the prominent role of combatant commands and the CJCS’s role in complex assessments, a glimmer of a broader, more strategic role for the CJCS and Joint Staff began to materialize.

¹⁷⁰ CJCSI 3100.01C, “Joint Strategic Planning System,” A-1.

¹⁷¹ *Ibid.*, F-1.

2016–2017

The first three years of General Joseph F. Dunford Jr.'s tenure as chairman brought some of the most sweeping changes to the state of joint strategic planning, more than at any other time since the Goldwater-Nichols Act. It marked a consequential change to the structure and form of the majority of the strategic guidance and the processes to support decision-making in the joint force.

Though distributed only through classified channels, General Dunford promulgated a new vision of the NMS. In 2015, General Dempsey had defined the NMS as “inform[ing] combatant commander employment of the Joint Force.”¹⁷² A year later, Dunford's definition emphasized the centrality of the CJCS to the combatant commands by saying the NMS served as the “central strategy and planning document for the Joint Force.”¹⁷³ The 2016 NMS that followed was the first classified NMS since the 1989 NMSD. Rather than publicly and openly telegraphing military strategy, General Dunford classified the strategy, protecting its contents from adversaries who could more easily exploit it given their more globalized reach.¹⁷⁴ Given the importance of allies and partners, whom Dunford described as a “strategic center of gravity,” the Joint Staff released versions to them following release of the initial strategy.¹⁷⁵

An examination of the trends in the strategic environment led to three propositions in the NMS, which were addressed as implications. First was the need to develop a balanced inventory of joint capabilities enabling the joint force to defeat potential opponents across the full range of military operations. Second was the emergence of competitors using statecraft at a level below the threshold that would trigger a traditional military response. The third was the need for greater strategic integration in planning, decision-making, and resource allocation to capture a global perspective in war and competition short of war.¹⁷⁶

To address the first, Dunford codified five strategic “priority challenges” that had been introduced in 2015 by Secretary of Defense Ashton B. “Ash” Carter. Those priority challenges became known colloquially as the “4+1”: four threats from traditional state actors of Russia, China, North Korea, and Iran,

¹⁷² Ibid., D-1.

¹⁷³ CJCSI 3100.01D, “Joint Strategic Planning System” (Washington, DC: Joint Staff, 20 July 2018), B-1.

¹⁷⁴ Brian W. Everstine, “The Nation's Military Strategy? That's Classified,” *Air Force Magazine*, 22 September 2016, <https://airforcemag.com/the-nations-military-strategy-that-s-classified>

¹⁷⁵ General Joseph F. Dunford Jr., “From the Chairman: Allies and Partners Are Our Strategic Center of Gravity,” *Joint Force Quarterly* 87 (October 2017), <https://ndupress.ndu.edu/jfq/joint-force-quarterly-87/>.

¹⁷⁶ General Joseph F. Dunford, Secretary of Defense Global Integration Annex, *National Military Strategy Implementation Guidance* (Washington, DC: Joint Staff, 13 July 2017).

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plus one nonstate actor threat from violent extremist organizations. These priority challenges had been developed as a planning construct to develop capabilities that would enable the joint force “to respond to the unexpected and that has a competitive advantage against any potential adversary.”

To address the second, the 2016 NMS continued the notion of balancing and integrating military responses across five warfighting domains (land, maritime, air, space, cyber) to the “4+1.” The state-based priority challenges were selected because of their use of economic coercion, political influence, unconventional warfare, information operations, cyber operations, and military posture to advance their interests.¹⁷⁷ In place of the NSIs in the 2015 NMS, the 2016 NMS oriented on five mission areas that described the activities of the joint force: assure allies and partners, compete below the level of armed conflict (with a military dimension), deter conventional attack, deter the use of WMD (and its proliferation), and respond to threats.¹⁷⁸

To address the third trend, the 2016 NMS introduced a concept called *global integration*, initially defined as “cohesive military actions in time, space, and purpose, executed as a whole to address transregional, multi-domain, and multi-functional challenges.”¹⁷⁹ Global integration was a reaction to Dunford’s assessment that “any future conflict would be “transregional, rapidly crossing the boundaries of geographic combatant commands; multidomain, simultaneously involving combinations of land, sea, air, space, and cyberspace operational domains; and multifunctional, including conventional operations, special operations, ballistic missiles, strike, cyber, and space capabilities.” Dunford introduced his intent by saying the military needed to

better organize ourselves and organize information from across the Joint Force to better facilitate National Command Authority decisionmaking in a timely manner. We need to give the President and Secretary of Defense the right information on a routine basis so they can have real-time ability to see the fight; to visualize in time and space the opportunities to seize the initiative; and to better identify potential opportunity costs.¹⁸⁰

The premise of global integration was to address threats across regions, domains, and functions through planning, operations, and capability

¹⁷⁷ General Joseph F. Dunford Jr., “From the Chairman: Strategic Challenges and Implications,” *Joint Force Quarterly* 83 (October 2016), <https://ndupress.ndu.edu/jfq/joint-force-quarterly-83/>.

¹⁷⁸ The mission areas were first released in unclassified form several months after the release of the strategy. Colonel Francis J. H. Park, presentation to Joint Force Education Council, “National Military Strategy,” Fort McNair, DC, 20 June 2017.

¹⁷⁹ Brigadier General Bradley T. Gericke, presentation slides, “Strategic Direction of the Armed Forces,” (Washington, DC: Joint Staff J-5, 13 September 2017), 7.

¹⁸⁰ Dunford, “From the Chairman: Strategic Challenges and Implications.”

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development to maintain a competitive advantage over potential adversaries.¹⁸¹ While the label of global integration was commonplace, its elements were in flux coming out of the 2016 NMS, a reflection of Dunford's propensity to refine his thinking over time through gradual implementation. In practice, its definition was more descriptive than it was normative.¹⁸² However, the overall premise of global integration entailed a more expansive role for the CJCS in rendering military advice to the secretary of defense for challenges that outstripped the ability of a single combatant command to address.

One of the least-known aspects of the 2016 NMS was a separate document called the NMS Implementation Guidance. Certain aspects of the NMS included direction to the force that normally would be held under executive privilege, specifically national-level strategic guidance for the five priority challenges as well as institutional force direction. It also included a more detailed treatment of global integration. Each of those NMS annexes represented a subsection of the NMS Implementation Guidance.¹⁸³ Those annexes were the first attempt since the 1989 NMSD to provide strategic direction to the force oriented on specific challenges, whether for force employment or force development.

Although the annexes on the chairman's priority challenges did not gain much traction, they did portend the development of global campaign plans (GCPs) against the five priority challenges. Those plans, developed at the Joint Staff, addressed the coordination of actions on a day-to-day basis against the five priority challenges. They were the brainchild of J-5 director Lieutenant General Kenneth F. McKenzie, who sought to coordinate the actions of multiple combatant commands against challenges that spanned multiple combatant command areas of responsibility and required responses across multiple domains—in other words, beyond the ability of any single CCDR to address alone. In their execution, the GCPs would be executed in distributed fashion through multiple CCDR theater campaign plans. A CCDR would be delegated coordinating authority for planning below the level of a GCP, assessing the global campaign, and recommending changes in the global campaign back to the Joint Staff.¹⁸⁴

¹⁸¹ General Joseph F. Dunford Jr., foreword to *2016 National Military Strategy* (Washington, DC: Joint Chiefs of Staff, 11 November 2016) (S, information used is U).

¹⁸² *Ibid.*; Colonel Francis J. H. Park, presentation slides to US Coast Guard, "National Military Strategy/Joint Strategic Campaign Plan," (Washington, DC: Joint Staff J-5, 7 August 2017); Brigadier General Bradley T. Gericke, presentation slides, "Strategic Direction of the Armed Forces," (Washington, DC: Joint Staff J-5, 13 September 2017), 5–6.

¹⁸³ An annex for the nuclear enterprise that was to replace the old NUWEPS guidance in the GEF was envisioned but was not produced. General Joseph F. Dunford Jr., *National Military Strategy Implementation Guidance* (Washington, DC: Joint Staff, 20 February 2017).

¹⁸⁴ Director for Joint Force Development (J-7), *Joint Publication 5-0: Joint Planning* (Washington, DC: Joint Chiefs of Staff, 16 June 2017), III-7–III-9.

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The expression of the relationship of strategic guidance and the central role of the NMS appeared on a slide titled “Providing for the Strategic Direction of the Armed Forces” (figure 11). The name was derived from one of the chairman’s responsibilities in 10 USC §153. The slide clearly showed the centrality of the NMS as an oversized box, with presidential guidance above it and secretarial guidance to the left of it. McKenzie used it extensively in his briefings to the joint force and interagency, and in his guidance to the J-5, he specifically intended for it to replace the former Rolling Doughnuts chart in popular use. A version of the slide was eventually incorporated into the 2017 edition of Joint Publication 5-0, the first joint doctrine to incorporate global integration.¹⁸⁵

The relationship of GCPs to combatant command contingency plans was a work in progress, as the 2016 NMS introduced the notion of an integrated contingency plan (ICP). The ICP was supposed to be the collection of the combatant command contingency plans related to a priority challenge, but what they lacked at the time was any unifying document that coordinated the execution of those contingency plans. The plans in an ICP would be executed by their respective combatant commands. The CCDR delegated coordinating authority for a global campaign oriented on a priority challenge would also be designated the supported commander for the main contingency plan in an ICP.¹⁸⁶ What remained unresolved was assessment of the ICP, which competed for resources with the development of GCPs. The changes wrought in the wake of the 2016 NMS were sweeping, but there was still much left to do to close some of the gaps that were being discovered in the new array of strategic guidance documents.

¹⁸⁵ Park interview.

¹⁸⁶ Gericke, presentation slides, “Strategic Direction of the Armed Forces,” 5–6.

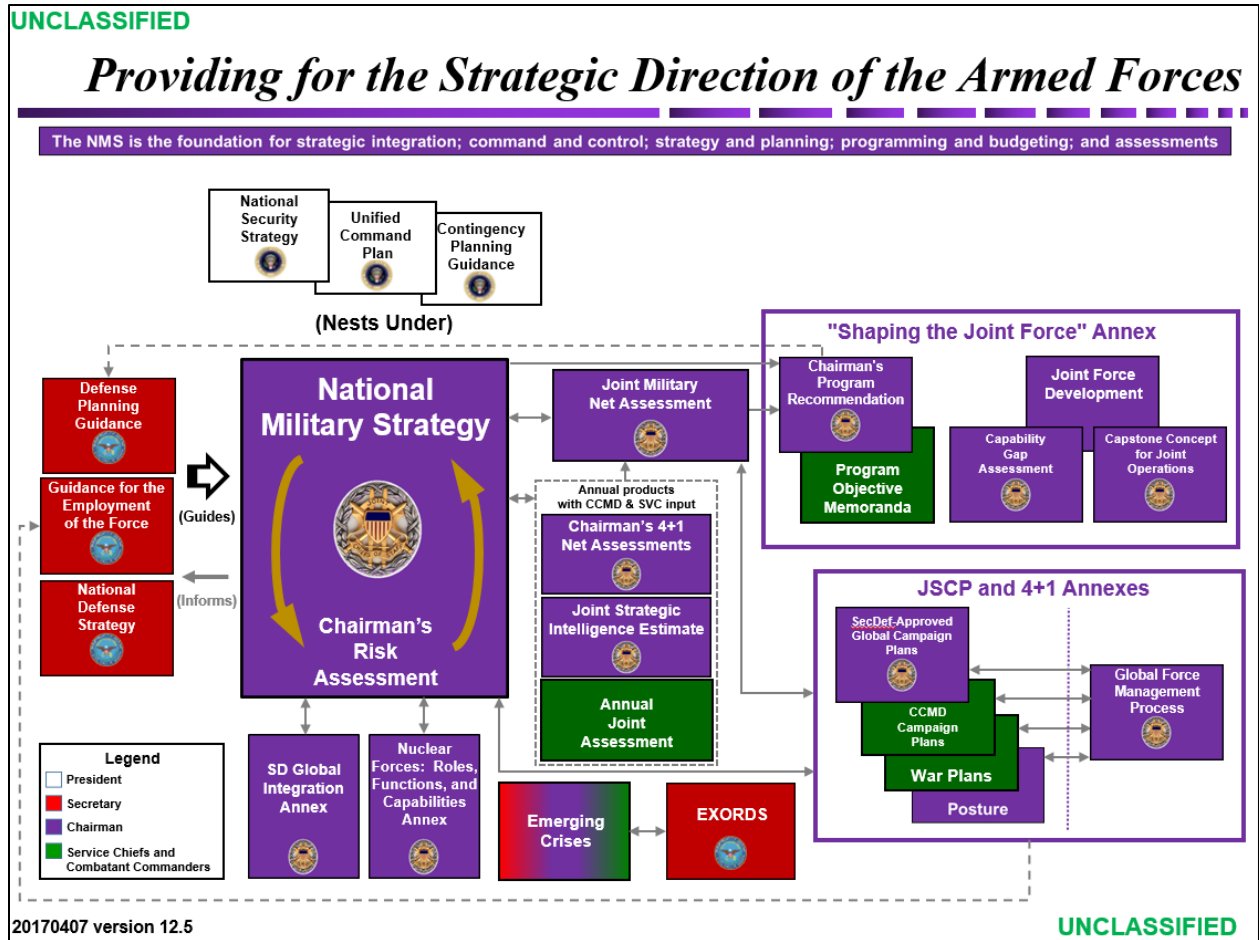


Figure 11. Providing for the Strategic Direction of the Armed Forces Chart, April 2017.¹⁸⁷

Figure 12 shows an early illustration of the relationship of the various campaign and contingency plans that was developed in the strategy development division and promulgated within the joint planning and execution community in mid-to-late 2017. Internally described in the J-5 as the “Funnel Chart,” it was the first attempt to show how the 2016 NMS, its NMS Implementation Guidance, and the evolving JSCP would be operationalized through campaign and contingency plans across the joint force. It also was an attempt to describe the various roles associated with coordinating authority at different levels, between the Joint Staff and the combatant commands.

¹⁸⁷ The original name of the slide within the J-5 was “Solving World Hunger,” based on McKenzie’s description that if anyone could explain the full scope of the slide, they would be capable of solving world hunger. The name gained traction within the joint planning and execution community, but it was deemed unsuitable for more formal presentation and was replaced. The version here is a version subsequent to the change of title. Gericke, presentation slides, “Strategic Direction of the Armed Forces,” 8.

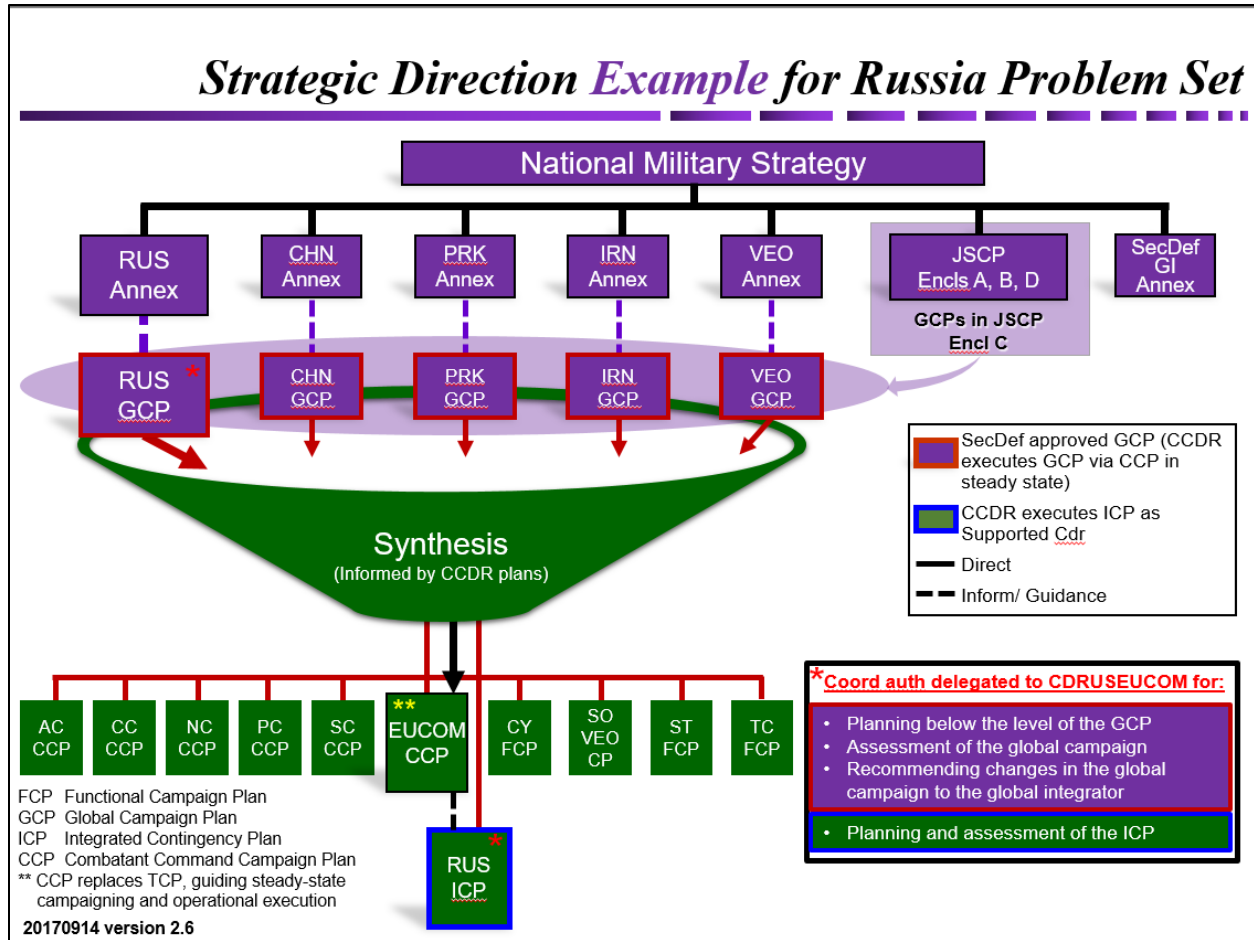


Figure 12. Strategic Direction Example (“Funnel Chart”), September 2017.¹⁸⁸

December 2017 saw the issuance of the first NSS under President Donald J. Trump. Continuing the trend toward competition below the level of armed conflict in the 2016 NMS, the NSS discussed “rivals” that not only competed with the United States across a variety of domains, but who also “use[d] technology and information to accelerate these contests in order to shift regional balances of power in their favor.”¹⁸⁹ The strategy highlighted Russia and China, who were beginning to “reassert their influence” globally, in addition to various other state and nonstate actors who wished to do harm to the United States.¹⁹⁰ To confront such challengers, the NSS contained language expressing

¹⁸⁸ The Funnel Chart was originally marked FOUO, but it was later superseded by the subsequent release of the 2018 JSPS and thus no longer predecisional. Gericke, presentation slides, “Strategic Direction of the Armed Forces,” 6.

¹⁸⁹ Donald J. Trump, *National Security Strategy* (Washington, DC: White House, December 2017), 25.

¹⁹⁰ *Ibid.*, 27.

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a desire for “integrated regional strategies that appreciate the nature and magnitude of these threats.”¹⁹¹

2018

In January 2018, Secretary of Defense James N. Mattis published a new NDS closely following the direction and tone of the 2017 NSS. Pursuant to the statute in 10 USC §113, the 2018 NDS was a classified document. It was the first time the base strategy had seen publication in classified form, although it also included an unclassified summary.¹⁹² The subtitle of the strategy was “Sharpening the American Military’s Competitive Edge,” asserting that the United States was emerging from a period of strategic atrophy, resulting in an erosion of American competitive military advantage over other actors in the security environment. Rather than terrorism, great power competition was now the primary concern in US national security.¹⁹³

Instead of the priority missions of previous strategies such as the QDR and DSG, the 2018 NDS listed defense objectives that support the national interests of the 2017 NSS. While some were straightforward, such as “defending the homeland from attack” and “deterring adversaries from aggression against our vital interests,” others were internally focused, such as “continuously delivering performance with affordability and speed as we change Department mindset, culture, and management systems.”¹⁹⁴

The central idea of the 2018 NDS was to “expand the competitive space” through three ways: rebuilding military readiness and a more lethal force, strengthening alliances and attracting new partners, and reforming the Defense Department’s business practices for greater performance and affordability. The 2018 NDS specifically focused on modernization rather than legacy systems, including nuclear modernization. Most notably, it focused on the anti-access/area denial threat through its emphasis on missile defense, joint lethality in contested environments, and “forces that could deploy, survive, operate, maneuver, and regenerate . . . while under attack.”¹⁹⁵

In the years of execution, the 2018 NDS introduced a change to force management: dynamic force employment, which was a model for balancing requirements for contingency sourcing with meeting the requirements for force employment on a day-to-day basis. As written, it was intended to be paired

¹⁹¹ Ibid., 45.

¹⁹² Although there was a classified edition of the 2008 NDS, it was a derivative of the unclassified NDS and saw limited distribution. James N. Mattis, *National Defense Strategy* (Washington, DC: Department of Defense, January 2018).

¹⁹³ James N. Mattis, *Summary of the 2018 National Defense Strategy* (Washington, DC: Department of Defense, January 2018), 1.

¹⁹⁴ Ibid., 4.

¹⁹⁵ Ibid., 4–5.

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with a global operating model to describe how the joint force would be postured and employed to achieve its competition and wartime missions. Looking to the future, the NDS charged the development of new operational concepts to enhance the lethality of the force and maintain a competitive advantage into the future.¹⁹⁶ To enable that work, the NDS focused those concepts and their associated capability development priorities around a classified set of six critical challenges and eight key operational problems.¹⁹⁷

Released eleven months later, the 2018 revision of the NMS, while repeating the same themes as the 2016 NMS, added considerable detail and structure while implementing the defense policy, strategy, and prioritization from the 2018 NDS. In an unclassified supplement, Dunford repeated President Trump's warning, saying that because "every operating domain is contested, competitors and adversaries will continue to operate across geographic regions and span multiple domains." To counter such challenges, Dunford argued for a military strategy that was more global in nature, rather than simply being a compilation of regional strategies from the combatant commands. He also advocated for a force that was less focused on responding to regional contingencies, but rather capable of "employing its capabilities seamlessly across multiple regions and all domains."¹⁹⁸

What made the 2018 NMS unusual was its structure. This NMS introduced a "continuum of strategic direction" to frame global integration activities. Rather than activities such as force employment, joint capability development, and joint force development, the continuum proposed three strategy horizons of force employment, force development, and force design. Force employment would address planning, force management, and decision-making to fulfill the defense objectives of the NDS. Force development adapted functions, capabilities, and concepts to improve the current joint force. Force design focused on innovation to enable the joint force to do what it does differently to retain a competitive advantage against any adversary.¹⁹⁹ Much of the structure and the five mission areas of the 2016 NMS became a strategy for force employment, while the institutional force direction from the previous edition was replaced by a complementary strategy for force development and force design, a first for the NMS, which had generally treated the future force indirectly. Finally, the 2018 NMS rescinded the NMS Implementation Guidance and its annexes, incorporating its previous content into the basic document as

¹⁹⁶ Ibid., 7.

¹⁹⁷ CJCSI 3030.01, "Implementing Joint Force Development and Design" (Washington: Joint Chiefs of Staff, 3 December 2019), B-1.

¹⁹⁸ General Joseph F. Dunford Jr., *Description of the National Military Strategy 2018* (Washington, DC: Joint Staff, 2018), 1-2.

¹⁹⁹ Ibid., 1.

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military strategic approaches to bridge its two strategies of force employment and institutional force development.²⁰⁰

The 2017 NSS, 2018 NDS, and 2018 NMS all marked a rare confluence of strategic guidance, where three national strategies were issued in close succession to each other. The three reflected unusual coherence of strategic direction as the strategies had been developed in roughly the same strategic context by writing teams at the National Security Council, the Office of the Secretary of Defense, and the Joint Staff that operated in relatively close coordination relative to previous efforts.

The middle of the year witnessed the publication of the fourth variant of the CJCSI. That instruction exhibited an evolution of the broader role for the CJCS as well as reflected the national security establishment's firm view of the global nature of threats facing the United States. To match the NMS that the Joint Staff was drafting concurrently, the CJCSI issued that year offered a more global view. It acknowledged a change in legal requirements, one that required a "global military integration" from the CJCS.²⁰¹ To address the global nature of threats, comply with a statutory requirement to do so, and formally capture all that had occurred in the previous three years, the CJCSI outlined a "transformation" of strategic military advice emanating from the CJCS, specifically "the development of globally integrated strategies, plans, and decision-making processes to address transregional and multifunctional threats across all domains."²⁰² Further emphasizing this new role, the list of statutory duties was rearranged to match the chairman's functions in 10 USC §153, with "Strategic Direction" moving to first place, rather than the "Assess" of the previous two CJCSIs.

Such direction was a direct result of meeting the global nature of threats. In being able to counter such threats, the CJCS and Joint Staff "require[d]" an "integrated global perspective."²⁰³ It referred to the introduction of the concept of "global integration" in the 2016 NMS and refined its definition as an "arrangement of cohesive Joint Force actions in time, space, and purpose, executed as a whole [and] a top-down, iterative process that integrates planning, prioritizes resources, and assesses progress toward strategic objectives."²⁰⁴ While the document retained some of the assessment responsibilities from previous iterations, it noted how those assessments were recast in light of global integration. To provide the staff mechanism for global integration, the CJCSI formally established four joint strategic planning

²⁰⁰ Colonel Francis J. H. Park, lecture to US Army War College, "Global Integration, National Military Strategy 2018, Joint Strategic Planning System," Carlisle Barracks, PA, 27 November 2018.

²⁰¹ CJCSI 3100.01D, "Joint Strategic Planning System," 2.

²⁰² *Ibid.*, 2.

²⁰³ *Ibid.*, A-1.

²⁰⁴ *Ibid.*

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groups, three of which became operative. The JSSIG remained the action officer and branch chief venue for strategy, plans, and assessments. Biannually, there was a Joint Strategy Working Group (JSWG) at the O-6/GS-15 level to prepare topics for discussion at the general officer/flag officer Joint Worldwide Planners Seminar (JWPS). The CJCSI also redefined the JSSIG as a group with representation from all Joint Staff directorates to conduct “continuous coordination and collaboration,” with action officers and branch chiefs meeting weekly to collaborate.²⁰⁵ Those joint strategic planning groups captured a practice that had emerged in the wake of the 2015 instruction.

Lastly, the CJCSI also redefined the JSCP. First, the 2018 instruction codified the new name of the 2017 JSCP, which was no longer the Joint Strategic Capabilities Plan and was no longer focused on its previous role in allocating forces amongst the combatant commands. As the newly renamed Joint Strategic Campaign Plan, it became a “five-year global strategic plan that operationalizes the NMS.” The new JSCP provided direction on integrating the various combatant command plans toward achieving broader strategic objectives.²⁰⁶

Furthermore, the combatant command plans lost their centrality. The new CJCSI formalized the role of GCPs to integrate the joint force’s day-to-day activities against threats that crossed domain, functional, and/or geographic boundaries.²⁰⁷ This derived from a change in 10 USC §153(a)(3) that directed the CJCS to provide advice on integrating military forces across the globe to address threats. Such advice also was to include recommendations on allocating and transferring forces between the combatant commands to achieve strategic objectives. It also formalized the structure of ICPs as families of related contingency plans across multiple combatant commands.²⁰⁸

The emergence of GCPs owed to a reexamination of a phasing construct that had existed in joint doctrine since 2001. Initially regarded as a “concept for arranging operations,” it was normally used for operational planning and envisioned four phases, beginning with deter/engage, seize initiative, decisive operations, and ending with transition. This model was the provenance of the term “phase IV operations” that saw common use after the start of Operation IRAQI FREEDOM.²⁰⁹ In the wake of experience in that campaign and others,

²⁰⁵ The fourth entity that did not see realization was the Strategy Integration Board (SIB), which was a Joint Staff-internal O-6/GS-15 level forum above the JSSIG. CJCSI 3100.01D, “Joint Strategic Planning System,” A-3-A-4.

²⁰⁶ Ibid., C-1.

²⁰⁷ Ibid., C-3.

²⁰⁸ Ibid., C-1-C2, G-1.

²⁰⁹ Director for Operational Plans and Joint Force Development (J-7), *Joint Publication 5-00.1: Joint Doctrine for Campaign Planning* (Washington: Joint Chiefs of Staff, 25 January 2002), II-16.

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the model expanded in 2006 to include shaping and enabling civil authority, as expressed in figure 13 and in joint operational planning doctrine.²¹⁰

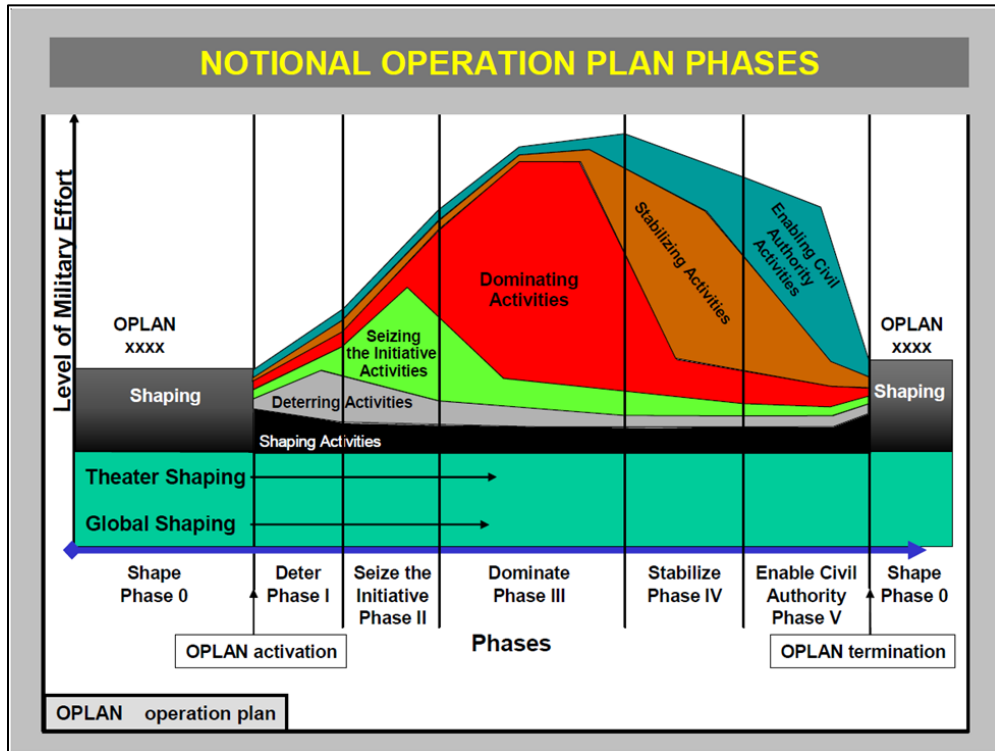


Figure 13. Notional Operation Plan Phases from Joint Publication 5-0 (2006).

²¹⁰ Director for Operational Plans and Joint Force Development (J-7), *Joint Publication 5-0: Operation Planning* (Washington: Joint Chiefs of Staff, 26 December 2006), IV-34.

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CHAIRMAN OF THE JOINT CHIEFS OF STAFF
WASHINGTON, DC 20318-9999

CM-0218-17
26 August 2017

ACTION MEMO

FOR: SECRETARY OF DEFENSE

DepSec Action _____

FROM: General Joseph F. Dunford, Jr., CJCS *J.F.D./26*

SUBJECT: Removal of Phasing at Strategic-Level Discussions

The current phasing construct around which we currently plan and conduct in-progress reviews stifles strategic discussion, and it constrains our ability to counter certain threats below the threshold of contingency plan execution and places the United States in a reactive, vice a proactive role. This overemphasis on phasing limits our ability to compete short of conflict with competitors who do not adhere to phases of combat or a binary "peace or war" construct. Additionally, the current phasing model does not account for escalation or de-escalation (off-ramps) as an integral part of the planning and decision-making process.

Memorandum at TAB directs the Department to cease using phasing models for policy and guidance discussions among the Joint Staff, Combatant Commanders, and Office of Secretary of Defense Staff. This will help us identify discrete options for the President and Secretary of Defense to apply pressure to coerce or co-opt global competitors across the competition continuum (short of armed conflict) without the expectation of escalation to a contingency plan. These options—complete with associated authorities, resources, and risks—will provide a better framework for the current transregional fight.

RECOMMENDATION: Sign memorandum at TAB.

COORDINATION: NONE

Attachment:
As stated

Figure 14. CJCS Action Memo on Removal of Phasing from Discussions of Contingency Planning, 26 August 2017.

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During his first Strategic Seminar Series event after assuming the office of the chairman, Dunford asked the combatant commanders in which phase of conflict they envisioned themselves in relation to their competitors. He believed that that phasing construct limited thinking about competition, enabling competitors to seize the initiative.²¹¹ Subsequent discussions with Secretary Mattis led to a formal reexamination that rebalanced analysis of campaigns from the combatant command level upwards to approve the use of GCPs as a formal planning construct.²¹² That use also coincided with a move away from the phasing construct for discussions of policy and guidance, as described in figure 14.

Almost immediately after issuance of the 2018 JSPS instruction, there were additional changes to address the changes in practice that continued to evolve even while the instruction was being published to the joint force. The first was the creation of a set of contingency plans at the national level, analogous to the GCPs but oriented on the decision-making in the transition from day-to-day activities to conflict with one or more of the priority challenges. The result was globally integrated base plans (GIBPs). The 2018 readiness review of a potential Korea scenario strongly reinforced the need for, and indeed importance of, such GIBPs to synchronize and deconflict forces and activities across multiple combatant commands, even against a non-great power competitor.²¹³

In more formal structure, the Joint Staff created two entities to address global integration. The director of J-5 changed the focus of the deputy directorate dealing with transnational threats into one dedicated to coordinating the plans and policy aspect of global integration. This reorganization, involving the transition from the cross-functional team dedicated to violent extremist organizations to an “enhanced cross functional team” to manage the planning of strategic opportunities in force employment, mirrored a 2018 reorganization within the J-3 to establish an Integrated Operations Division to manage its execution.²¹⁴ Also, to coordinate efforts across combatant commands, the fall JWPS meeting and its attendees were repurposed as the Strategic Opportunities Decision Board to evaluate “strategic

²¹¹ The Senior Seminar Series is the chairman’s forum to discuss matters of strategic importance with senior leaders in the services and combatant commands. Interview, General Joseph F. Dunford Jr., Chairman of the Joint Chiefs of Staff, 12 February 2019.

²¹² Memorandum, CJCS to Secretary of Defense, “Office of the Secretary of Defense Alternative Phasing/Planning Expectations Memorandum,” 31 October 2017 (memorandum is unclassified when separated from its attachments).

²¹³ Park interview.

²¹⁴ Presentation, Transregional Threats Coordination Cell Overview (Washington, DC: Joint Staff J-5, 24 September 2019) (U//FOUO, information used is U).

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and operational planning, execution, and assessment issues” as well as distribute and harmonize actions across combatant commands.²¹⁵

In October 2020, the GIBPs were retitled “Global Integration Frameworks” (GIFs) to better reflect their purpose; the nomenclature of a “base plan” had created expectations that detracted from the purpose of the documents, which was to guide strategic decision-making in the transition from day-to-day operations up to conflict as necessary. The GIF would fill the gap that had emerged between the GCPs and the ICPs in the original concept of global integration, representing a maturation of the processes and documents to direct the joint force through the continuum of conflict. The GCPs, while written by the Joint Staff, were oriented primarily on the combatant commands and their campaign plans. In contrast, the role of the GIF in guiding the transition from day-to-day operations to potential combat made its primary focus the secretary and the chairman. In that sense, the GIF was unique among plans documents.²¹⁶

Thus, by the end of 2020, the Joint Staff had once again moved into the centralized planning role it had maintained during the Cold War. Also like its Cold War predecessor, the Joint Staff became more directive in nature, rather than simply collating inputs from the combatant commands. Such a shift derived not only from the more globalized nature of the various threats facing the United States, but also from the need to effectively and efficiently utilize a force that was much smaller than had existed during the Cold War.

²¹⁵ CJCSI 3100.01D, “Joint Strategic Planning System,” A-4; Park interview; Lieutenant General David Allvin, action memo to Director, Joint Staff, Subject: Strategic Opportunity Decision Board Summary of Conclusions (Washington, DC: Joint Staff J-5, 6 January 2020) (U//FOUO, information used is U); Email, Colonel Barry E. Daniels, JOEUR Division Chief to Brigadier General Michael S. Cederholm, Deputy Director for Regional Operations, Joint Staff J-3, title “Status of IOD Stand-Up,” dated 8 March 2018 (U).

²¹⁶ Presentation, Brigadier General Stephen Jost, Deputy Director for Joint Strategic Planning, Joint Staff J-5 to Director, Joint Staff, Subject: Global Integration Framework Overview (Washington, DC: Joint Staff J-5, November 2020) (CUI, information used is U); Director of Joint Force Development (J-7), *Joint Publication 5-0: Joint Planning* (Washington, DC: Joint Chiefs of Staff, 1 December 2020), I-10.

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Acronyms and Abbreviations

CJA	Comprehensive Joint Assessment
CJCS	Chairman of the Joint Chiefs of Staff
CJCSI	Chairman of the Joint Chiefs of Staff instruction
CONPLAN	Concept Plan
CRA	Chairman's Risk Assessment
DSG	Defense Strategic Guidance
FY	Fiscal Year
GCP	global campaign plan
GDF	Guidance for Development of the Force
GEF	Guidance for Employment of the Force
GFM	Global Force Management
GIBP	globally integrated base plan
GIF	Global Integration Framework
GWOT	Global War on Terrorism
ICP	integrated contingency plan
JCCA	Joint Combat Capability Assessment
JCS	Joint Chiefs of Staff
JLRSE	Joint Long Range Strategic Estimate
JPG	Joint Programming Guidance
JROC	Joint Requirements Oversight Committee
JSCP	Joint Strategic Capabilities Plan
JSOP	Joint Strategic Objectives Plan
JSPD	Joint Strategic Planning Document

JSPS	Joint Strategic Planning System
JSR	Joint Strategy Review
JSSIG	Joint Staff Strategy Integration Group
JSWG	Joint Strategy Working Group
JWCA	Joint Warfighting Capabilities Assessment
JWPS	Joint Worldwide Planners Seminar
MOP	Memorandum of Policy
NDAA	National Defense Authorization Act
NDS	National Defense Strategy
NMS	National Military Strategy
NMSD	National Military Strategy Document
NSDD	National Security Decision Directive
NSI	national security interest
NSS	National Security Strategy
QDR	Quadrennial Defense Review
SCMR	Strategic Choices and Management Review
USJFCOM	US Joint Forces Command
USSOCOM	US Special Operations Command

