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## CHAIRMAN OF THE JOINT CHIEFS OF STAFF INSTRUCTION



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DISTRIBUTION: A, B, C

CJCSI 5780.01  
24 October 2022

### JOINT KNOWLEDGE MANAGEMENT PROGRAM

#### References:

See Enclosure E

1. Purpose. This instruction establishes Chairman of the Joint Chiefs of Staff (CJCS) policy, guidance, and responsibilities for the Joint Knowledge Management (KM) program.
2. Superseded/Cancellation. CJCSI 5124.01, 12 April 2013, "Charter of the Knowledge Management Cross-Functional Team," is hereby cancelled.
3. Applicability. This instruction applies to the Joint Staff, Combatant Commands (CCMDs), and Combat Support Agencies (CSAs). It applies to other U.S. Government agencies when they join and operate with joint forces. It provides policy guidance that will apply to Joint Force Commanders working with other U.S. interagency and coalition mission partners.
4. Policy. This instruction provides guidance for the Joint KM program and establishes the authorities to implement and enforce KM standards relevant to the full range of military operations and joint organizations. The joint force requires accurate and timely exchange of information to empower decision-making; applying the principles of KM at all echelons enables that exchange. The principles of KM (see Glossary) apply to all activities and missions. When applied, these principles enable improved staff efficiency across joint force activities and increase the collaboration and shared understanding necessary to enhance decision quality and decision cycle effectiveness.
5. Definitions. See Glossary.
6. Responsibilities. See Enclosure B.
7. Summary of Changes. Not applicable. This is a new instruction.

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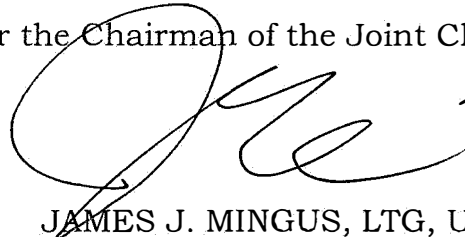
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8. Releasability. UNRESTRICTED. This directive is approved for public release; distribution is unlimited on the non-secure internet protocol router (NIPR) network. DoD Components (to include the CCMDs), other Federal agencies, and the public may obtain copies of this directive through the Internet from the CJCS Directives Electronic Library at <<http://www.jcs.mil/library>>. Joint Staff activities may also obtain access via the secure internet protocol router (SIPR) network directives Electronic Library web sites.

9. Effective Date. This INSTRUCTION is effective upon receipt.

For the Chairman of the Joint Chiefs of Staff:



24 Oct 22

JAMES J. MINGUS, LTG, USA  
Director, Joint Staff

## Enclosures

- A – Introduction
- B – Responsibilities
- C – KM Program Elements
- D – Joint KM Working Group
- E – References
- GL – Glossary

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## ENCLOSURE A

### INTRODUCTION

#### 1. Overview

a. KM is defined as a discipline that integrates people and processes enabled by tools throughout the information lifecycle to create shared understanding, increase organizational performance, and improve decision making.

b. The overall goals of implementing KM principles are to enable strategic advantage, reduce mission risk, protect mission knowledge, and improve the quality and timeliness of advice and decisions. These goals are achieved through actively sharing knowledge and information across the joint enterprise by and through established, defined, and codified processes. These activities seek to enhance shared understanding of issues, functions, and priorities in order to solve collective problems and address issues that cross enterprise, hierarchical, and/or functional boundaries. Furthermore, KM activities seek to minimize the loss of organizational knowledge through personnel transition, thereby advancing organizational learning.

c. KM activities are nested with leader priorities and mission requirements and should always be designed to increase organizational efficiency and improve decision making across four mission critical areas:

- (1) Decision cycle effectiveness.
- (2) Shared understanding through collaboration.
- (3) Mission and organizational performance.
- (4) Agile learning.

d. This document encompasses fundamentals and activities that meet the criteria listed above and should be considered for inclusion in organizational level KM programs.

(1) Support for staff synchronization across the entirety of staff actions and activities with leader decision events, often called battle rhythm.

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(2) Organizational knowledge continuity activities intended to minimize loss of organizational knowledge through personnel transition in order to accelerate organizational learning and efficiency.

(3) Process mapping, analysis, and improvement.

(4) Collaboration tools and KM competency training.

(5) Cross functional shared understanding and awareness (e.g., common operational picture processes and tools, dissemination standards, knowledge and information visibility).

(6) Knowledge accessibility, discoverability, use, and transfer.

## 2. Program Objectives

a. Establish and sustain effective KM governance. The program shall be designed to consistently and methodically drive improvements in four mission critical areas:

(1) Improved decision cycle effectiveness.

(2) Shared understanding through collaboration.

(3) Enhanced mission and organizational performance.

(4) Agile learning.

b. Promote effective and intellectually agile knowledge sharing behaviors throughout the joint enterprise that will improve the quality of collaboration leading to improved decision quality and speed at all echelons. This will lead to greater shared understanding across all aspects and functions of missions, processes, events, and stakeholder perspectives and across all echelons and functions of the joint enterprise in order to enhance mission and organizational efficiency and performance.

c. Provide standards and best practices for collaboration, storage, sharing, use, reuse, and disposition of knowledge products.

d. Provide training on KM competencies tailored for leadership, staff, and KM practitioners.

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## ENCLOSURE B

### RESPONSIBILITIES

#### 1. Director, Joint Staff

- a. Designate a Joint Staff Chief Knowledge Officer (CKO) unless otherwise established to implement the Joint Staff KM Program.<sup>1</sup>
- b. Provide executive oversight of staff synchronization (also known as battle rhythm)
- c. Provide support and endorsement of the Joint Staff KM program and its activities, as well as advocating for a culture of sharing and collaboration, which is vital to driving positive change and incremental improvement within the team and across the enterprise.
- d. When applicable, designate a decision board or appropriate decision venue with the authority to approve recommendations from the Joint KM Working Group (JKMWG). Report KM initiatives and statuses to the designated decision venue, in accordance with (IAW) established convening frequency.

#### 2. Joint Staff Director of Management

- a. Provide executive oversight of the Joint Staff KM program and activities, identify resources and funding mechanisms for KM initiatives, and integrate, encourage, and model knowledge intended to promote shared understanding across the Joint Staff.
- b. Provide executive oversight of staff synchronization analysis and optimization efforts conducted by the Joint Staff CKO.

#### 3. Joint Staff Chief Knowledge Officer

- a. Establish and oversee the Joint Staff KM program, governance, and procedures and integrate it with KM programs across the joint force. Chair working groups (WGs) or other venues that govern KM programs or activities, including the JKMWG or other KM WG as required for internal staff processes.
- b. Establish and maintain a staff synchronization plan with the goal of documenting and optimizing the decision-making processes.

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<sup>1</sup> Joint Staff CKO and KM Division established 13 July 2020 (see reference c)

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c. Establish and oversee the Joint Staff process improvement and KM assessment program to identify organizational-level health and competency in knowledge creation, knowledge flow, and transfer. The results of assessments will be used to close gaps in knowledge sharing and improve process performance (i.e., documentation, repeatability, and error reduction) and shared understanding.

d. Manage user-facing aspects of collaborative tools and technology and develop, implement, and manage training for collaborative tools and technology that supports their use and improves organizational processes.

e. Develop and maintain a training program that includes elements of knowledge management best practices and addresses approaches to improving content management and knowledge discoverability.

f. Maintain a KM competency program, congruent with the Joint KM Competency Guide (to be published in the fourth quarter of 2023), and KM competency training provided by the Services, other accredited KM training programs, and reference a.

g. Coordinate with data management (DM), information management (IM), and records management (RM) offices and teams to maximize sharing and provisioning of knowledge and optimize knowledge, information, data, and decision-making environments and staff synchronization.

h. Provide inputs to and maintain the respective organization's information in the Enterprise KM Community of Practice Registry.

i. Participate in the Joint Lessons Learned Program and contribute information (e.g., observations, best practices, issues, and recommendations) applicable to and derived from execution of the KM Program and activities, as appropriate, which improve joint activities, capabilities, and readiness.

#### 4. Joint Staff Directorates

a. Support process improvement activities within the directorate using an approved or systematic methodology and with the assistance of the Joint Staff CKO and KM team. Understand the purpose and concepts of process improvement and assist the Joint Staff CKO in inventorying and fully documenting all relevant processes.

b. Support the organizational process improvement and KM assessment program guided by the Joint Staff CKO.

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c. Document, capture, store, and make visible and accessible the knowledge inherent to their directorate in order to maintain it through personnel transition and make it available for shared understanding across the force. The continuity program will make personnel transition in and out of the organization smoother and integration quicker and more thorough.

d. Assign a representative who will:

(1) Participate in and contribute to JKMWGs and KM synchronization efforts.

(2) Assist the CKO in documenting their directorate's participation in and contributions to the relevant processes captured in the Joint Staff Information Flow Diagram.

(3) Support the staff synchronization optimization plan by managing cross functional efforts lead by their directorate.

## 5. Combatant Commands, Combat Support Agencies, and Chairman's Controlled Agencies

a. Designate an organization or agency equivalent CKO to implement their KM Program.

b. Provide support and endorsement of the organization's KM program and its activities, as well as advocating for a culture of sharing and collaboration, which is vital to driving positive change and incremental improvement within the team and across the enterprise.

c. Assign KM roles and responsibilities IAW this policy.

d. Provide executive oversight and accountability of the organization's KM program and activities, identify resources and funding mechanisms for KM initiatives, and integrate, encourage, and model knowledge sharing intended to:

(1) Provide executive oversight of staff synchronization, taking the entirety of the system of processes, staff actions, leader decision events, and meetings together to drive shared understanding of decision cycles to optimize the timeliness and quality of leader decision making (i.e., oversight of the staff "battle rhythm").

(2) Collaborate with Joint Staff and other joint force organizations to analyze and optimize the holistic joint battle rhythm intended to improve

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shared understanding across geographic and functional boundaries, improve the quality and speed of decision making, and increase joint force efficiency.



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## ENCLOSURE C

### KM PROGRAM FUNDAMENTALS

#### 1. Staff Synchronization Support (i.e., battle rhythm)

a. The term “battle rhythm” is used to describe the activities and events (i.e., meetings, engagements, actions, briefings, and products) that must be synchronized to support leader decision cycles. Effectively synchronizing activities in time and space and optimally using the collaboration tools available builds the shared understanding across the organization necessary for high quality, timely decision making. It also allows for assessing staff utilization, which leads to more effective and efficient use of staff time.

b. The Chief of Staff (COS) or Director of Staff (DOS) is typically responsible for staff synchronization and will assign responsibilities for its management.

c. CKOs will support their organization’s staff synchronization by:

(1) Providing tools that support staff synchronization with the objective of optimizing those tools to function seamlessly with processes captured in information flow diagrams, strategic calendars, meeting management tools, and staff utilization matrices.

(2) Providing recommendations the COS/DOS (or other senior staff representative or battle rhythm manager if one is assigned) for optimization and synchronization of battle rhythm events, meetings, and activities to improve shared understanding and decision speed and quality.

(3) Periodically reviewing the entirety of regular or recurring cross-functional activities, including boards, bureaus, centers, cells, and WGs (B2C2WGs) that support CJCS advice and decision making with the goal of applying process improvement methodologies to improve overall synchronization in the staff.

(4) Providing recommendations for the establishment and disestablishment of cross-functional recurring B2C2WGs intended to improve decision making. Additionally, providing recommendations for conduct and synchronization of the events, inputs, and outputs that support these cross-functional efforts.

(5) Collaborating across the joint force to analyze and optimize the holistic joint battle rhythm intended to improve knowledge and information

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sharing and shared understanding across geographic and functional boundaries, improve the quality and speed of decision making, and increase joint force efficiency.

(6) Providing staff training on battle rhythm tools, processes, and activities, including best practices for meeting management and staff utilization metrics.

## 2. Continuous Improvement of Processes

a. The joint force is a complex environment with an intricate system of interconnected processes. Organizations are required to have a deliberate program to document and understand the relationships between functions and processes and conduct process improvement activities.

b. Organizations will seek to continuously improve processes using commonly accepted methodologies, with assistance from their CKO. The intent of these efforts is to inventory and fully document all relevant organizational processes in order to completely define, describe, and map the relationships, information flows, and activities in and between process nodes. This serves to identify gaps, seams, and redundancies; indicate staff utilization; and improve shared understanding across the full spectrum of organizational functions and operations. These activities will include, but are not limited to, process inventories, information flow mapping, and narrative explanations to show linkages between functional areas.

c. KM assessments will be conducted to evaluate the overall level of KM competency within the joint force. These assessments will identify gaps in knowledge creation and sharing as well as gaps in processes that support decision making. They will be conducted periodically across the organization and will improve knowledge flow and shared understanding of issues and processes.

## 3. Collaborative Tools and Portals

a. CKOs will guide, shape, and, where appropriate, develop training on collaborative tools and software used by the organization, including, but not limited to, software, portals, databases, and other resources and services. CKOs will guide others to solutions and, where appropriate, train KM competencies. In coordination with technology acquisition staff and the data and information management officers and teams, the KM team will assess the capabilities of available collaborative and KM/decision-making tools. The KM team will then compare such tools against processes and requirements to

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determine the best courses of action for optimizing shared understanding, organizational efficiency, and decision making.

b. The KM team will maintain training resources for training the staff on KM-related collaborative tools and software used by the organization. This includes training on the use of portals, databases, and other online resources. It will also train KM competencies IAW reference a and Service KM competency training. All CKOs have a role in training their staff on effective employment of information technology tools used by the staff for general collaboration across their enterprise.

#### 4. Content Management and Knowledge Discoverability

a. The objective of this effort is to improve shared understanding and organizational and individual efficiency and effectiveness by establishing rules and communicating best practices for management of knowledge and knowledge products throughout their lifecycle.

b. This effort intends to make it easier, quicker, and more intuitive to find organizational knowledge and information through best practices for the creation, identification, collaboration, naming, storage, and disposition of new and existing knowledge and knowledge products. It also intends to help the staff more efficiently and effectively find outside information that might also bear on a particular issue, topic, or decision. It also includes ensuring RM policy is followed.

c. Items that should be addressed include, at a minimum:

- (1) Use of portals, shared drives, and personal drives.
- (2) Portal governance.
- (3) Collaboration on and sharing of documents and files.
- (4) Versioning and version control.
- (5) Naming conventions and metadata will be in coordination and compliance with DoD Chief Data Officer policy, where applicable.
- (6) Records identification.
- (7) Structuring of electronic file systems (taxonomy).

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(8) File discovery, searching, and document searchability (ontology).

## 5. Enterprise KM Community of Practice Registry

a. Each CKO leads their KM program across their command's/agency's enterprise. The Enterprise KM Community of Practice (COP) Registry allows others to see and access contact information for all CKOs across the DoD Component enterprise as well as other KM practitioners across the force.

b. Each organization is required to update the registry at least quarterly or upon transition of KM personnel within their team. The Enterprise KM COP Registry is currently located at <<https://intelshare.intelink.gov/sites/kmconf/Lists/KMPOCs/Alphabetical.aspx>>.

6. KM Competency Guide. In support of the DCR assigned tasks, the Joint Staff CKO and KM team will maintain a list of recommended KM competencies congruent with those taught by Service-accredited KM programs, vetted with inputs from the CCKM CKOs and Service KM representatives (where available) and as described in reference a. CKOs will incorporate KM competencies into training provided to their staff.

## 7. Internal KM Synchronization Working Group

a. Each organization's CKO shall establish an internal KM WG that will identify and address internal, organizational-centric KM-related issues and concerns.

b. Membership will include, at a minimum, the organization CKO, KM staff, and duty-appointed KM representatives from across the organization; other members of the organization with interests in KM activities or equities in KM efforts are encouraged to attend as required to support those KM initiatives, projects, or activities.

c. These KM WGs will feed KM issues, concerns, best practices, and lessons learned to the JKMWG for staffing and implementation.

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## ENCLOSURE D

### JOINT KM WORKING GROUP

1. Scope of Activity. The JKMWG (<<https://intelshare.intellink.gov/sites/kmconf/SitePages/Portal.aspx>>) has Joint Staff, Service, CCMD, CSA, CCA, and defense field agency representatives who focus on sharing information and KM best practices across the joint enterprise.

### 2. Objectives

- a. Increase knowledge sharing across the joint force and joint community.
- b. Standardize KM and collaborative best practices and procedures, including technologies and tools.
- c. Address current and emerging KM issues and provide a forum for attendees to discuss them.
- d. Focus on organizational communication and streamlining processes.
- e. Identify best practices and reuse of processes.
- f. Encourage transparency, implementation, and efficiencies.
- g. Promote alignment of Joint KM with other Federal and industry KM, IM, DM, and RM (reference b) initiatives and processes.
- h. Advertise training and sharing opportunities to provide a “marketplace” to share KM ideas and help standardize practices and content where appropriate.
- i. Address progress of Doctrine, Organization, Training, materiel, Leadership/Education, Personnel, and Policy Change Recommendation (DCR) actions and establish sub-WGs as required to support completion of DCR tasks.

### 3. Organization, Roles, Responsibilities

a. Decisions, when appropriate, will be made generally by consensus, with the CKO from each organization listed in paragraph 1 receiving a vote. The Joint Staff Action Process will continue to be utilized for official staff actions and changes to doctrine, policies, or instructions.

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b. The chair will determine the JKMWG agenda and activities, with consideration given to inputs and recommendations from the formal members of the JKMWG. Schedules and events should be based on Joint KM strategy, supplemented with standardization of KM best practices and procedures.

c. Joint Staff will provide secretarial support and produce meeting minutes or a recording to the WG following the conclusion of events.

d. Representatives will:

(1) Consider issues presented to the JKMWG and provide guidance or assign specific actions to execute, as appropriate.

(2) Serve as strategic communicators by carrying information regarding the JKMWG back to their organization to advocate compliance and JKMWG brokered processes. Note: The JKMWG will use Enterprise Task Management Software Solution to staff formal joint policy.

e. The JKMWG will maintain a collaboration site and chat rooms as appropriate to facilitate linkages between organizations.

f. This instruction serves as the charter for the JKMWG.

## 4. Frequency

a. Meetings will be held twice monthly, with frequency adjusted as required with concurrence of a majority of voting membership.

b. Stakeholders will provide KM topics, issues, requirements, and inputs seven days before scheduled meetings.

## 5. JKMWG Meeting Specifics

a. Meeting Chair. Joint Staff CKO.

b. Membership. Voting membership of the JKMWG will be the CKO or delegated representative from the Joint Staff, CCMDs, Services, and CSAs.

c. Optional Attendees. All other DoD agencies.

d. Purpose. Increase knowledge sharing across the joint force and joint community; standardize KM and collaborative best practices; address current and emerging KM issues, and provide a forum for attendees to discuss them;

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and promote alignment of Joint KM with other Federal and industry KM/IM/RM initiatives and processes.

- e. Venue/location. MS Teams (NIPR).
- f. Inputs. As required to support the JKMWG.
- g. Outputs. As determined by the objectives and conduct of each meeting.
- h. Agenda. As determined by the Joint Staff KMD with input from stakeholders.
- i. Minutes (and recordings when applicable). Posted to JKMWG site within 24 hours of completion of meetings

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## ENCLOSURE E

### REFERENCES

- a. JROCM 063-21, 30 August 2021, "DOTmLPF-P Change Recommendation for KM"
- b. Title 44, U.S. Code, chapter 31 – Records Management by Federal Agencies
- c. VDJS memo, 13 July 2020, "Establishment of Joint Staff Chief Knowledge Officer"

### RELATED DOCUMENTS

1. CJCSI 3150.25 Series, "Joint Lessons Learned Program"
2. JSM 5100.01 Series, "Organizations and Functions of the Joint Staff"
3. JSM 5762.01 Series, "Joint Staff Portal Governance"
4. JP 3-0, "Joint Operations," 11 August 2011
5. JP 3-33, "Joint Task Force Headquarters," 31 January 2018
6. JP 3-12, "Cyberspace Operations," 8 June 2018
7. DoDD 8000.01, "Management of the Department of Defense Information Enterprise," 10 February 2009
8. DoDI 8320.02, "Sharing Data, Information, and Information Technology (IT) Services in the Department of Defense," 24 June 2020
9. DoDI 8500.01, "Cybersecurity, DoD CIO," 7 October 2019
10. "DoD Open Government Plan," Version 2.1, 31 August 2012
11. OMB M-10-06, "Open Government Directive," 8 December 2009
12. CJCSI 3150.25 Series, "Joint Lessons Learned Program"
13. DoDD 8000.01, "Management of the Department of Defense Information Enterprise," 17 March 2016, Ch-1 27 July 2017

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14. DoDI 5010.43, "Implementation and Management of the DoD-Wide Continuous Process Improvement/Lean Six Sigma (CPI/LSS) Program," 17 July 2009
15. "DoD Digital Modernization Strategy, DoD Information Resource Management Strategic Plan FY19-23," 12 July 2019
16. CJCS Guide 3501, 5 May 2015, "The Joint Training System – A Guide for Senior Leaders"
17. CJCSM 3500.03 Series, "Joint Training Manual for the Armed Forces of the United States"
18. ATP 6-01.1 (FM 6-1.01), "Techniques for Effective Knowledge Management," 6 March 2015
19. Joint Staff J-7/Deployable Training Division Insights and Best Practices Focus Papers, "Knowledge and Information Management," third edition, May 2018
20. Joint Staff J-7 Insights and Best Practices Focus Papers, "Joint Headquarters Organization, Staff Integration, and Battle Rhythm," third edition, September 2019
21. Joint Staff J-7 Insights and Best Practices Focus Papers, "Chief of Staff (COS) Roles and Functions at Joint Headquarters," second edition, January 2020
22. Joint Staff J-7 Insights and Best Practices Focus Papers, "Mission Command," second edition, January 2020
23. Joint Staff J-7 Insights and Best Practices Focus Papers, "Joint Operations," fifth edition, November 2017
24. Joint Staff J-7 Insights and Best Practices Focus Papers, "Joint HQ Terms of Reference (TOR)," February 2019
25. Joint Staff J-7 Insights and Best Practices Focus Papers, "Chief of Staff (COS) Roles and Functions at Joint Headquarters," second edition, January 2020
26. Joint Staff J-7 Insights and Best Practices Focus Papers, "Forming a JTF HQ," September 2015

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27. International Standard (ISO) 30401, “Knowledge Management Systems-Requirements,” first edition, 2018

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## PART I-GLOSSARY

### ABBREVIATIONS AND ACRONYMS

B2C2WG	boards, bureaus, centers, cells, and working groups
CCMD	Combatant Command
CIO	Chief Information Officer
CJCS	Chairman of the Joint Chiefs of Staff
CJCSI	Chairman of the Joint Chiefs of Staff Instruction
CJCSM	Chairman of the Joint Chiefs of Staff Manual
CKO	Chief Knowledge Officer
COS	Chief of Staff
CSA	Combat Support Agencies
DCR	Doctrine, Organization, Training, materiel, Leadership/Education, Personnel, and Policy Change Recommendation
DoD	Department of Defense
DoDI	Department of Defense Instruction
DOS	Director of Staff
DM	data management
IAW	in accordance with
IM	information management
JKMWG	Joint Knowledge Management Working Group
JROCM	Joint Requirements Oversight Council Memorandum
KM	knowledge management
NGB	National Guard Bureau
NIPR	non-secure internet protocol router network
OSD	Office of the Secretary of Defense
RM	records management
SIPR	secure internet protocol router network

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## PART II-TERMS AND DEFINITIONS

Knowledge Management Principles. Knowledge management is the process of enabling knowledge flow to enhance shared understanding, learning, and decision making (ADRP 6-0). Knowledge flow is the ease of movement of knowledge in organizations. Knowledge management provides the means to efficiently share knowledge, thus enabling shared understanding and learning in organizations. The following are widely accepted KM principles (ISO 30401, “Knowledge Management Systems-Requirements,” first edition, 2018).

1. Knowledge is intangible, complex, and created by people.
2. Knowledge is a key source of value for organizations to meet their objectives.
3. Knowledge management serves organizational objectives, strategies, and needs.
4. Knowledge management is adaptive; there is no one knowledge management solution that fits all organizations within all contexts.
5. Shared understanding: people create their own knowledge by their own understanding of the input they receive. For shared understanding, knowledge management should include interactions between people using content, processes, and technologies, where appropriate.
6. Environment: knowledge is not managed directly; knowledge management focuses on managing the working environment, thus nurturing the knowledge lifecycle.
7. Culture: culture is critical to the effectiveness of knowledge management.
8. Knowledge management is iterative. It should be phased, incorporating learning and feedback cycles.

Knowledge Product. A report, document, spreadsheet, or presentation created based on individual or staff work that has value to the organization or the enterprise in the conduct of business.