

Joint Special Operations University



STRATEGIC PLAN 2021-2026

01 FEB

**JSOU Office
of the
President**

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¹(H.E.²R.O.TM = Highly Educated, Hyper-Enabled Responsible Operator)

²(NED-S = Net Estimate Development System)

President's Vision and Intent

Congratulations on successfully achieving “Greenlighted” stage and status on our JSOU “NEXT” adaptation ‘change leadership’ initiatives! Now, the real work begins! As we move forward into implementation, I want to provide you with some additional specific expectations and guidance on a number of key/major JSOU “NEXT” establishment actions. The Joint Special Operations University’s (JSOU) Strategic Plan for 2021-2026 is sequel to our JSOU “NEXT” Net Estimate Report, and the guidance here reinforces and builds upon our priorities, directions, intent and destinations articulated in that Report, and all documents of guidance, directive and priorities informing the same.

The Joint Special Operations University’s (JSOU) Strategic Plan for 2021-2026 comes at a critical moment in the evolution of the University. These are times of dramatic, international-security and domestic-political change; a time of ‘power-in-transition’, bringing the real possibility for *transformational systems change*. Strategic uncertainty is only made more ambiguous by lingering global economic recessionary tendencies and trans-regional conflicts that weaken states and the international order itself. A comprehensive *understanding* of the changing character of geopolitical competition and the environment of conflict, first and foremost, is prerequisite for true strategic leadership. Education is the key to this knowledge and understanding.

In a time of diminishing resources and rapidly evolving educational prerogatives, the challenges and opportunities we face require clear, actionable objectives and tasks that will serve to center all of our collective activities going forward. We must continue to work hard on synergistic efforts with United States Special Operations Command (USSOCOM) to ensure a “SOF universe” mindset in everything we do. At the same time, we must identify and advocate for the unique aspects of JSOU mission sets to ensure we optimize all of our academic and support processes towards our desired end state—to *prepare SOF professionals to address strategic and operational challenges, arming them with the ability to think through problems with knowledge and insight*.

With this in mind, our “roadmap” for JSOU “NEXT” begins with (and will always build upon) a comprehensive estimate of the changing character of geostrategic competition and implications for US national and global interests, roles and responsibilities. Determining what kind of (Joint and Combined) Special Operations Force (SOF) is needed to match and overmatch the challenges and opportunities in this evolving geostrategic environment for the 2020s and 2030s is the ultimate question the JSOU “NEXT” Strategic Plan must answer. This question drives a running comprehensive “estimate” of the global geostrategic environment (+COMSOCOM Intent) from which we will derive our combined-joint SOF Education Objectives. These Objectives must produce – in broad stroke and by way of JSOU’s approach to strategic & operational education and training, advancement of knowledge, and leader development – the following Institutional Learning Outcomes (ILOs) enabling *Future SOF Leaders* to:

1. Demonstrate advanced cognitive and communication skills employing agile, critical, creative, systematic and innovative thought (**Strategic Thinking and Communications**);
2. Demonstrate an understanding of the SOF profession of arms and the embodiment and enforcement of shared ethics, norms and laws of the profession of arms. Appreciate the utility of SOF must always remain exquisite, proactive, and aimed at solving problems, and in ways that avoid moral injury to the Nation (**The Profession of Arms**);
3. Apply knowledge of the nature, character, and conduct of special operations, war and conflict, and the instruments of national power, across the full continuum of cooperation, competition, conflict and war to achieve national security objectives (**The Continuum of Competition, Conflict, and War**);

4. Analyze historical, cultural, political, military, economic, technological, and other competitive forces, to identify threats and opportunities endemic to the current and future operating environment (**The Security Environment**);
5. Demonstrate a broad understanding of joint, interagency, intergovernmental, and multinational (JIIM) capabilities to develop strategies and plans for the conduct of joint-combined SOF war-fighting, at the operational to strategic levels across the continuum of cooperation, competition, conflict and war (**Strategy and Joint Planning**);
6. Demonstrate the application of US, SOF, allied, and partner military force to conduct globally integrated, all-domain operations and integrative campaigns, for national power purposes (**Globally Integrated Operations**).

As these ILOs define the JSOU Vision and Mission, we must *review, renew, reorient* and *reenergize* the “critical capability” that powers JSOU – **the JSOU Faculty**; a faculty that must be a balanced mix of academic professors and professors of practice (Military; Title 10; GS/Title 5; Contractors). Our faculty, with critical assistance and support from the staff, will lead a “Needs-Based” reconsideration of the JSOU curricula and all learning outcomes (LOs).

Our JSOU “NEXT” Roadmap must include a plan to reorient, redirect, and where appropriate reorganize JSOU’s Organization and business practices, towards the ultimate goal of **One JSOU Team**, contemporized in its updated leading-edge education and leader development curricula, pathway learning outcomes (PLOs), and andragogy. It is a JSOU Team unified in support to the Nation, through “SOF’s Advantages” which sustains and leverages the unique advantages of SOF to advance America’s security, defense, and military strategies.

Ultimately, JSOU’s new focus is to...Be(come) “SOCOM’s Center of Joint SOF Thinking” and to be(come) SOCOM’s “Innovation and Experimentation Laboratory” on “all things SOF education.” As the Joint Force focuses on “All” Domain Operations (ADO), JSOU “NEXT” must provide the Commander, USSOCOM with the intellectual energy and foresight to look at ADO’s complement in the Joint-Combined Special Operations Forces (SOF) domain, in order to lead efforts to “*innovate within the model*” of SOF’s traditional roles and missions-sets in ways that ‘enlarge the context’ as well as the impact of SOF’s core expertise in direct action and strategic raiding.

In order to drive and inspire **transformational change** for the SOF Enterprise, we need to educate and produce strategically-minded leaders who are also masters in the art, science and craft of operations, who can bring to the moment strategic vision, tailored recommendations, discrete analysis, and fully developed concepts. This is a need only we as the Center of Educational Excellence for the “SOF universe” can provision. JSOU “NEXT” must reorient, refresh, and renew itself and all our practices in ways that take the lead on re-sharpening the edge of Special Operations’ enduring ethos of “The Quiet Professionals” as SOF’s advantage *for Nation*, not itself.



Isaiah (“Ike”) Wilson III, PhD

President, Joint Special Operations University

Purpose and Overview: JSOU “NOW TO NEXT”

The primary purpose of this JSOU Strategic Plan is to provide more detailed expectations and guidance for moving JSOU “NEXT” from ‘Concept’ to ‘Strategy and Implementation’, in the wake of our JSOU “NEXT” Net Estimate Outbrief to the USSOCOM Commanding General (CG) on 16 Sep 2020.

During our Outbrief with the CG, we presented a three-“bin” taxonomic analytic for categorizing the JSOU current (and future planned) curricula and courseware, importantly, based on the intended purpose of the learning experience for the intended target audience. This three-bin taxonomy of **Teach-to-INFORM**, **Teach-to-PREPARE**, and **Teach-to-ENABLE** is our way forward, and will help us to right-realign our programming, resource allocations, and pedagogical and andragogical approaches to what we ‘must’ teach, ‘should teach differently’, as well as what we can and should consider for JSOU divestiture.

- ‘**Teach-to-INFORM**’=’s discretionary & non-discretionary delivery
- ‘**Teach-to- PREPARE**’=’s JSOU “Teaches-the-Trainers” on biannual/annual basis
- ‘**Teach-to-ENABLE**’=’s largely, the business of Commanders, Command Senior Enlisted Leaders, and Staff Leaders; JSOU Divests/Follows-and-Supports

One important insight we have learned from our multi-month Net Estimate is the fact that one of JSOU’s main educational delivery ‘modes and mechanisms’ is through ***Integrated (JIIM-based) Campaigning***. In addition, we find that this is especially true of, and is an especially effective method and mode for, our Teach-to-PREPARE educational missions. One of the most fundamental and transformational changes coming forth in our JSOU ‘Next’ adaptations will be the ‘expansion and enlargement’ of JSOU education delivery and leader preparation and development services beyond the mere ‘discretionary’ and discrete demand signal from field operators into anticipatory prospective, needs-based requirements identification and generation. This alone is *transformational*, requiring major shifts in how and for what outcomes we ‘teach’.

This Strategic Plan enables the University to:

- Define a strategic direction and guide for the near term (next five years), while not limiting future opportunities.
- Embed strategic thinking (“strategic-mindedness”) in the decision-making process of the University at all levels.
- Enable the JSOU to align strategic goals, objectives, and priorities in resource allocation and management in a dynamic environment.
- Embed principles of continual institutional renewal and improvement.
- Ensure excellence in education and leader development, scholarship, and support.
- Provide enhanced student experiences based on increased collaboration, resource use (people and tools), and integration across the University and the SOF Enterprise.
- Implement consistent policies and standards among functions.
- Value and maintain the best workforce.
- Strive to be efficient, effective, and resilient with streamlined and proficient administrative and support functions with reduced duplication.
- Conduct University-level assessment activities, strategic planning, resource allocation, and institutional renewal processes.

Strategic Plan Development Process

In June 2020, JSOU was directed by the USSOCOM Commanding General (CG) to conduct a 60-Day assessment of the University's direction and current curriculum; in short, a JSOU 'Now' assessment and initial aspects of the plan of action towards realizing JSOU "NEXT". Specifically, JSOU was asked to review the current Vision and provide recommendations to further develop JSOU's identity and direction, binding the team towards a common goal. Additionally, JSOU provided the CG with updated vision and mission statements that clearly reflected the essential tasks upon which to organize and resource JSOU "NEXT". The following priorities were indicated in the CG's guidance memo and were the focus of the 60-Day Assessment:

- **The JSOU Team:** Focus on refreshing the organization and unifying within JSOU for a common purpose.
- **Comprehensive Review (CR):** Reinforce and institutionalize the lessons of the CR for current and future SOF leaders; coordinate with the CR Implementation Team to develop the right curriculum for enterprise leaders at all levels.
- **Great Power Competition (GPC):** Challenge SOF's current thinking with respect to roles and missions regarding GPC and be on the leading edge of educational approaches understanding near-peer competitor challenges.
- **Connectivity:** Build and maintain strong connectivity with the 'thought ecosystem' of academia, think tanks, government agencies, and other Joint professional military education institutions.
- **Sensitive Activities (SA):** Prioritize the professionalization of our sensitive activities workforce, focusing on operations, oversight, and management.
- **Innovate for Future Threats:** Assess how to support and move the SOF enterprise into the digital realm, specifically in the areas of artificial intelligence and machine learning.

After 60 days, JSOU provided an assessment of the University's direction and current curriculum. Particular focus was given to "recommendations to divest of courses which do not provide a sufficient return on investment" (*to the Nation*, via its SOF Enterprise, not JSOU-proper) as well as an assessment of the International Education Program "with the goal of eliminating those (courses) that do not directly contribute to SOF support to GPC for DoD's priority countries or provide high-payoff support to C-VEO." As part of the assessment, JSOU was directed to identify courses for revision that were not aligned with the current national strategy, and provide "recommendations for rescission of any tasks that do not support JSOU's core mission." The memo directed JSOU to develop immediate options for increasing learning in the virtual classroom, including leveraging simulations and modeling to enhance the learning experience.

In response to the command-directed assessment, a plan was devised and outlined in a Memorandum of Initial Guidance from the JSOU President. The areas of focus he identified included: (1) reconsider what we currently teach, how we teach it, and to what audiences, (2) focus on the 'First Principles', nesting with 2018 NDS Priorities and JSOU "NEXT", while being agile and innovative to find and address future challenges, (3) look for divestitures, consolidations, and reducing redundancy for greater effective-cost savings, and (4) consider new methods to teaching, the pros and cons of course modules, core vs non-core, cross- functional and cross-domain models. This assessment establishes the "starting point" for JSOU "NEXT".

Multiple studies, short-in-duration, were designed to quickly and accurately assess JSOU's current state and inform efforts ahead as part of JSOU "NEXT". The outcomes of these first four studies provide a "snapshot in time" of JSOU Now and are summarized in the 60-Day Assessment Report (11 Sep 2020).

USSOCOM Priorities, JSOU Mission, Vision, and Branding Statement

USSOCOM Mission

USSOCOM develops and employs fully capable special operations forces to conduct global special operations and activities as part of the joint force to support persistent, networked and distributed combatant command operations and campaigns against state and non-state actors to protect and advance U.S. policies and objectives.

USSOCOM Commander's Priorities

- Compete and win for the nation
- Preserve and grow readiness
- Innovate for future threats
- Advance partnerships
- Strengthen our force and family

JSOU Mission

The Joint Special Operations University prepares SOF professionals to address strategic and operational challenges, arming them with the ability to think through problems with knowledge and insight.

We educate and develop “beyond the edge” Next-Generation Adaptive All-Domain SOF Leader-Operators capable of anticipating and influencing the current and future strategic environment, in support of National imperatives.

JSOU accomplishes this by delivering SOF-unique education and leader development programs of study and praxis to the USSOCOM world-wide enterprise and priority partners through generation and advancement of leading-edge knowledge and expertise through fostering special operations research & analysis and service-outreach engagement, in support of USSOCOM objectives and top US security priorities.

JSOU Vision

USSOCOM's “Think-Do Tank” – Center of Special Operations Thinking

SOCOM's ‘Innovation & Experimentation Lab’ on “All Things” SOF Education. World-Class in Joint-Combined strategic and operational “SOF-peculiar” education, preparation, and Leader development, the anticipation of war-fighter requirements, and the advancement of cutting-edge knowledge on the worldwide employment and applications of SOF, in support of the National Defense Strategy.

JSOU Branding Statement

Sharpening the Edge of SOF's Advantage: The All-Domain SOF Leader-Professional

JSOU Future Environment Assessment

As part of the plan development process, the University sought to understand the strategic environment by looking at trends 10 to 20 years into the future to gain an understanding of the variables that may affect the latter portions of the plan. Through a series of five White Papers (titled, *Sharpening the Edge of SOF's Advantage*) written by the JSOU President, several areas emerged that influenced and scoped the development of the JSOU Strategic Plan. Primary among them, "Towards a SOF 4th Age" (White Paper #2) and its embedded "Compound Security Dilemma" (CSD) 'Theory of Next' played a critical role in developing and designing the JSOU "NEXT" concept.

Towards a SOF 4th Age

In the lead-up to his congressional confirmation hearings, General Richard Clarke was asked for his view on ***what are (will be) the major challenges confronting the next Commander of USSOCOM.*** GEN Clarke offered that the next Commander of USSOCOM would confront three principal challenges through SOCOM's continued leadership (as DOD's 'Coordinating Authority') in (1) Countering Violent Extremist Organizations (CVEO) and (2) Countering Weapons of Mass Destruction (CWMD); as well as dealing effectively and with greater improved foresight, with (3) rising competition with China and Russia, under conditions of eroding US relative military advantage.

Today's tumultuous global security environment is one that can perhaps be best characterized, in summary, as *converging, trans-regional compound security dilemmas, and a growing pathological weakening of nation-states...* and as some now argue, even worse, a weakening of the western-liberal international system itself, which is premised on the primacy of the nation-state. The rise (perhaps 'return'?) of major (great) power competition (and specifically, the threats of a rising China and a revanchist Russia) only further compounds. This convergence of compounded security threats is presenting unique challenges and opportunities at very particular, and historically important, key border and regional geostrategic nexus locations.

General Clarke, in his testimony, continued,

In order to confront these challenges, we need an interoperable, healthy, trained, and ready Special Operations Force, to deliver lethal forces and capabilities globally, as well as provide SOF unique capabilities to expand the competitive space with our strategic competitors below the level of armed conflict. ... [W]e must drive transformation of the force and of our organization to improve our lethality, agility, and sustainability in a complex, strategic environment.¹

To drive and inspire such transformations, we need strategically-minded leaders who are also masters in the art, science and craft of operations, who can bring to the moment strategic vision, tailored recommendations, discrete analysis, and fully developed concepts. As the Joint Force focuses on "All" Domain Operations (ADO), JSOU must provide the Commander, USSOCOM with the intellectual energy and foresight to look at ADO's complement in the JSOF domain, in order to lead efforts to "*innovate within the model*" of SOF's traditional roles and missions-sets in ways that 'enlarge the context' as well as the impact of SOF's core expertise in direct action and strategic raiding. SOCOM has been at the forefront of global campaign planning and true global SOF integration; however, in what some are now calling a "post-ISIS" (or, at least, a "beyond"-ISIS) context, *where does JSOF go from here? Or rather how does JSOF adapt from here?* Exploring and charting JSOF's role in an expected return to major power competition is now an imperative. ***"To be SOF's Advantage, for Nation."***

¹ United States Senate, Armed Services Committee. 04 December 2018. *Advance Policy Questions for Lieutenant General Richard D. Clarke, USA Nominee for Commander, United States Special Operations Command.*

JSOU Strategic Plan Goals and Lines of Effort

The JSOU Strategic Plan's main areas of concentration mirror and nest within the USSOCOM Commander's Guidance in the form of three distinct goals and associated lines of effort (LOE). Each Goal/LOE provides the opportunity to examine a complex problem set that affects the University's ability to achieve its vision and mission for JSOU "NEXT" and maximize incorporation of the Commanding General's guidance and priorities over the next five years (and potentially beyond). Moreover, the goals and lines of effort provide a unique perspective on issues within the University's operating environment that it must address to surpass its current levels of excellence and high standards in the delivery of SOF-unique, SOF-peculiar education.

GOAL 1: Academic, practicum-based, outcomes-focused and professional development programs meeting the needs of the nation by producing highly valued and respected SOF leaders ready for continued service upon program completion.

LOE 1: TEACHING AND LEARNING (T&L)

The Next-GEN SOF: Highly Educated, Hyper-Enabled, Responsible Operator (H.E.².R.O.TM)

The goal of T&L resides primarily within our College of Special Operations/Low Intensity Conflict, Competition and Cooperation (SO/LIC³) and the Joint Special Operations University - Enlisted Academy (JSOU-EA), where the core of *who we are*, based on *what we do*, how and why, is manifest: teaching to inform current and future SOF Professionals. Our Academic Departments—buttressed by our people/talent—have always been, and remain, the heart-and-soul of JSOU. As stated in the "Sharpening the Edge of SOF's Advantage" white papers, "getting the faculty talent 'right' for the defining missions is at least 80% of the 'puzzles' solved." We have completed the 'review', and must now renew, reorient and reenergize the "critical capability" that powers JSOU – the JSOU Faculty; a faculty that must be a balanced mix of academic professors and professors of practice.

Our revised (2020) Mission Statement places new demands on JSOU as SOF's University and educational activity; most notably, emphasis on needs-based requirements 'generation'. This is a change consistent with USSOCOM's phased shift from its current pure 'demand-based' approach to manning, training, equipping, and employment of SOF, to a more effective-cost 'supply-based, demand-informed' model. This change is simple in word, but transformational in deed. This is especially so in the context of SOF education and leader preparation and development.

This 'simple' shift in orientation will still find JSOU performing our classic roles of "discretionary education" delivery services; but now also moving into the query for, identification of, and generation of needs-based requirements – to expand the view and understanding of our TSOCs and Components to deep and panoramic scope and scale, of future SOF educate, prepare, develop-the--Force needs. This 'simple shift' demands JSOU adjust its posture, 'presence', and priorities as an organization, as well as its manner of preparing its own human talent (in-residency and non-resident affiliated) to be(come) more "anticipatory and prospective" in 'All Things' relating to Leader education, preparation, and development. These new roles demand fore-sighting qualities and forecasting skills and experience.

JSOU's roles and responsibilities have expanded and enlarged, driven by a combination of transformational changes in global strategic landscape, changes in the international and domestic relations between and within state-societal constructs, and consequential changes in our country's security and defense interests and utility of force needs. As such, we must make changes in the ways and directions illustrated in our concept sketch of the JSOU "NEXT" Objective Design.

GOAL 2: *JSOU as a recognized leader in the creation of invaluable ideas on strategic issues relating to SOF and the global application of joint and combined SOF.*

LOE 2: RESEARCH AND ANALYSIS (R&A)

Generating Scholarship with Impact at the ‘Speed of Need’

In order to change “what we do,” we have had to begin the hard work of adjusting – “adapting” – the mechanisms of “how” we have approached the core aspects of our mission, roles and responsibilities. These changes will bring about the changes in core identity that will transform JSOU, “Then & Now,” to the JSOU “NEXT” intended by the CDRUSSOCOM, and needed by the SOF communities and our Nation, beyond the Next-Age “threshold crossing” before us. We are not only changing the outer “chassis” of the JSOU vehicle, but the engine and transmission of the vehicle as well! We must! At the heart of this internal recalibration is the “putting together of the pipes” of JSOU Research & Analysis (R&A) and Teaching & Learning (T&L) into one, integrative running “studies-driven approach to SOF Education and Leader Development” process.

Key aspects of this new Integrative (running, annual) collaborative planning approach to curricula development are:

- (a) Its motivating orientation toward producing “anticipatory prospective researched, SOF-peculiar requirements” pointedly aimed at identifying, framing, and providing viable solutions to current and future SOF needs (i.e., conduct of geostrategic “net estimates”-purposed R&A)
- (b) Its promise and potential for helping the USSOCOM Leadership to better advise National Leadership, writ-large, on those Combined and Joint (JIIM) Special Operations Force anticipated needs most appropriate and “ripe” for leveraging-in to JSOU student and professorate, R&A, T&L, and scholarship, and likewise, those issue areas less appropriate.

These aspects of our new Integrative R&A planning process and approach will help University and USSOCOM Leadership, on behalf of the ASD/SOLIC, SECDEF, and CJCS, to strike and maintain the right and proper effective balance between SECDEF intent for producing an “Intellectual Overmatch” within and across the SOF Profession, with the equal imperative of doing so in ways that avoid moral injury to the Nation.

The KEY to achieving this essential new role for JSOU “NEXT”, that is ... to become more anticipatory in the determination of – even the creation or generation of – new SOF-peculiar knowledge and in addition to our discretionary education service delivery, the provision of non-discretionary required learning is reorganizing ourselves in ways that build and foster within all of our processes and systems, a ‘Sensing’ capability and capacity. Anticipation and fore-sighting are essential.

GOAL 3: *Advancing the Joint Special Operations University, USSOCOM, and the role of CJSOF as a credible policy option in support of the National Security Strategy.*

LOE 3: SERVICE AND OUTREACH (S&O)

Build and sustain strong connectivity with the “Thought Ecosystem”

One important insight we have learned from our multi-month Net Estimate is the fact that one of JSOU’s main educational delivery ‘modes and mechanisms’ is through Integrated (JIIM-based) Planning. And we find that this is especially true of, and is an especially effective method and mode for, our Teach-to-PREPARE educational missions.

The biggest gap right now that JSOU must fill (and is not being done in any other PME) is a true fusion of military design and that of operational planning, coupled to industry cutting-edge theory and practice outside of the war paradigm, and informed by applied social scientific research.

JSOU has long enjoyed a hard and well-earned national, even international, reputation for its work in the areas of design and joint integrated planning. JSOU, at present, is home to a notable number of some of the most well-known and highly-regarded experts in design and JPP, as well as SOF applied research. In short, we have the right requisite talent, the right requisite resources and mission requirements, and the right requisite “moment” to bring this bounty of capabilities together in ways that produces ... a ... “design-inspired, applied research-organized and oriented, integrated (whole-of-government) planning ‘Way’.”

However, there is no way to achieve this aim by way of any single one of these three sub-tribes and their programs, operations, activities, and investments (OAI). We must build a flexible team willing to think/do/learn continuously...iteratively...not flip the switch from ‘think’ to ‘do’ and back and forth; or attempt to categorize one critical function from the other.

Therefore, in order to produce one (not many) Design-informed, Applied Research-supported, Integrated JIIM Planning Teaching ‘Method’, we will immediately move to reorganize our design, applied research, and Integrated JPP talent and resources into one organizational structure: creating a new Center for Adaptive and Innovative Statecraft (CAIS).

JSOU Strategic Plan Lines of Operation

The JSOU Strategic Plan's Lines of Operation (LOO) provide additional specific expectations and guidance on a number of key/major JSOU "NEXT" establishment actions. The LOOs reinforce and build upon our priorities, directions, intent and destinations articulated in all of the JSOU "NEXT" documents and guidance.

LOO 1: PEOPLE

Educate the Next-GEN SOF Professionals: Highly Educated, Hyper-Enabled, Responsible Operator (H.E.²R.O.TM)

JSOU is a hybrid institution (part military, part academic, serving a public professional educational and leader preparedness/development purpose) that seeks to build the best and most diverse civilian and military faculty. The academic discipline faculty are expected to generate and advance new knowledge to the thought and praxis of SOF, through the production of innovative and cutting-edge research and analysis and teaching and learning that directly impacts course curricula and content delivery. The primary responsibility of the practitioner faculty is to bring practical, experience-based relevancy, currency and expertise to both the teaching and research elements within JSOU. All faculty are responsible for supporting the JSOU institutional learning outcomes (ILOs) through **Teaching and Learning** (T&L), **Research and Analysis** (R&A), and **Service and Outreach** (S&O).

Problem Statement. The ability to recruit and hire the most credentialed faculty to support JSOU NEXT is currently limited due to restrictions within talent recruitment options by Title V (General Schedule), Military, and Contractor recruiting and hiring processes. As a result, the ability to bring on the appropriate talent to support the emerging requirements must include the ability to hire Title 10 (Excepted Service, Administratively Determined) faculty.

Categories for LOO 1 Objectives. The objectives, effects, and tasks for this LOO fall within four categories: Teaching and Learning; Research and Analysis; Service and Outreach; and Professional Development.

1. **Teaching and Learning (T&L)**

Objective L1-1: Curriculum that allows for flexibility to meet emerging content requirements and instruction that promotes mobility and modularity is developed and implemented.

Effect L1-1.1: Faculty capable of developing informed and innovative approaches in courseware and employing student centered practices that result in graduates who more effectively operate in the JIIM environment.

- a) *Task L1-1.1.1:* Codify student learning outcomes as the JSOU "institutional priority" in JSOU policy directives to ensure the student learning experience drives the prioritization and alignment of resources.
- b) *Task L1-1.1.2:* Improve teaching and the application of instructional methods by:
 - i. *Task L1-1.1.2.1:* Developing a center for teaching and learning that leverages active research support, curriculum development, faculty development, and instructional design, and maintains responsibility for implementing best/high impact practices and for maintaining norms and standards.

- ii. *Task L1-1.1.2.2:* Implementing a method and process that fosters and rewards a culture of innovative teaching and research by incentivizing effective teaching practices that can be piloted and shared intra- and inter-programs to inform decision making and develop scholarship. The method should require a proposal and approval process to track implementation and report on benefits/limitations of changes to curriculum/classroom approaches.
- iii. *Task L1-1.1.2.3:* Reviewing current faculty onboarding qualifications (military, civilian and contractors) and in-service mandatory training/education, and professional development to implement an on-going review of faculty teaching that ensures purposeful consistency. Better balance the need for instruction on teaching with faculty development in content areas.
- c) *Task L1-1.1.3:* Review program durations and iterations based on the teaching methods and modes required for achievement of desired student learning outcomes, to create opportunities for faculty reflection and improvement, for the development of scholarship, and to review and implement feedback from the review processes.
- d) *Task L1-1.1.4:* Develop graduate assistantship positions (as research assistants and teaching assistantships) to provide a means for faculty to expand research and develop educators that introduce students to the research experience.

2. Research and Analysis (R&A)

Objective L1-2: Recognition of the University's excellence of research and analysis, producing anticipatory prospective researched, SOF-peculiar requirements, pointedly aimed at identifying, framing, and providing viable solutions to current and future SOF needs.

Effect L1-2.1: A reputation as the premier institution and center of excellence within the DoD for educating SOF professionals and national security leaders who operate at the nexus of the strategic and operational levels in JIIM environments. Increase the production of scholarship from the University.

- a) *Task L1-2.1.1:* Create and resource collaborative exchanges, especially in regards to visiting faculty and post-doctoral positions specified in LOE 2, with peer institutions across government, academia, industry career fields, and domain expertise to enhance the professional value of the institution and constitute an institution of higher education that learns from other institutions.
- b) *Task L1-2.1.2:* Develop an institutional capacity, environmental awareness, and self-awareness leading to published scholarship in content areas at the strategic and operational nexus on the SOF core curriculum areas, and teaching in accelerated, time- compressed, inter-, multi-, and trans-disciplinary programs that develops and sustains a reputation for excellence that stakeholders and partners seek to leverage.
- c) *Task L1-2.1.3:* Design, develop and implement an integrative running "studies-driven approach to SOF education and leader development" process. Become more anticipatory in the determination of new SOF-peculiar knowledge and in addition to JSOU discretionary education service delivery, the provision of non-discretionary required learning.

3. Service and Outreach (S&O)

Objective L1-3: The reputation of JSOU and the composition, skills, and abilities of its workforce through an active engagement effort is enhanced.

Effect L1-3.1: The JSOU workforce is well known and highly integrated with its communities of interest.

- a) *Task L1-3.1.1:* Document members of JSOU's communities of interest and assign faculty/appropriate staff to specific community members to create liaisons and enduring relationships.
- b) *Task L1-3.1.2:* Incorporate provisions in the JSOU promotion and award policies that recognize active engagement (volunteering, teaching, presenting, participating) activities by JSOU employees in relevant communities of interest.

Effect L1-3.2: The JSOU workforce is comprised of experts in their fields.

- a) *Task L1-3.2.1:* Develop an engagement strategy to recruit and retain faculty and staff to support JSOU diversity and inclusion goals.
- b) *Task L1-3.2.2:* Incorporate provisions in the JSOU promotion and performance expectations policies that recognize JSOU employee efforts to attract highly qualified people to pursue positions at the University (i.e., an intentional effort to attract and recruit talented people to become potential future employees [including military officers for military faculty positions]).
- c) *Task L1-3.2.3:* Incorporate provisions in the JSOU promotion and performance expectations policies that recognize JSOU employees' efforts to contribute (globally) to JSOU's aggregate expertise and reputation (e.g., participation in: scholarly research, writing, and presentation in appropriate external forums; in real-world CCMD planning activities; in doctrine development; and in external wargames; ...).

Effect L1-3.3: Key stakeholders (e.g., DoD, USSOCOM, component commanders, congressional and local representatives) value JSOU for its ability to deliver highly rigorous, proactive and innovative educational programs critical to their needs.

- a) *Task L1-3.3.1:* Prepare all JSOU employees intellectually with the knowledge to be effective engagement ambassadors.
- b) *Task L1-3.3.2:* Develop a plan to take actions to enhance our reputation as a highly rigorous, proactive educational institution that meets DoD, USSOCOM, and others' needs (e.g., develop exportable curriculum packages; expand mobile training teams; increase areas of research and faculty expertise; serve as the hub of a hub and spoke educational enterprise model...).

4. Professional Development

Objective L1-4: All employees possess an approved and resourced professional development plan that supports the University's human capital requirements as well as continuing and emerging needs.

Effect L1-4.1: All employees who report for duty at JSOU (military/civilian/contractor) are familiar with relevant human resources and personnel management policies and procedures and are routinely informed of updates and additional opportunities.

- a) *Task L1-4.1.1:* Expand and maintain a comprehensive plan for "onboarding" of new employees every quarter.
- b) *Task L1-4.1.2:* Develop and resource an employee training program that provides updated career information to employees quarterly.
- c) *Task L1-4.1.3:* Supervisors and employees, conjointly, develop an employee career plan focused on long term professional development and career advancement of the employee.

LOO 2: ORGANIZATIONAL STRUCTURE

Chart our Complete JSOU "Universe"

By present-day design, JSOU is well poised and postured to deliver to discretionary-determined 'wants' of the Force in discrete fashion, which are motivated mostly if not only by the pure 'demand-side' of the equation. We must now do more, and differently; and this demands some modifications to how we are organized. The KEY to achieving this essential new role for JSOU "NEXT", that is ... to become more anticipatory in the determination of – even the creation or generation of – new SOF-unique and peculiar knowledge, and in addition to our discretionary education service delivery, the provision of non-discretionary required learning is reorganizing ourselves in ways that build and foster within all of our processes and systems, a 'Sensing' capability and capacity.

JSOU is intended to be(come) a hybrid organization, i.e., an academic institution of higher learning as well as a professional service 'vocational' organization, that also "serves and services" a profession of arms. As such, our organizational structure and 'design' must have a "hybrid Feng Shui" – just the right structures to effectively function as, as well as capture and foster the "culture" of, a top-quality academic university, AND, to function and foster the culture of an armed services profession command, in some architectures and administrative and support functions.

Problem Statement. By current organizational design, what was/is intended to be a "University" has been organized internally more in the form of an operational "command" rather than an institute of teaching and learning, research and analysis, and service and outreach. To meet our mandate as JSOU "NEXT", the organization needs to adopt a "hybrid" organizational design and internal structure – one that allows us to meet and live up to our "dual, hybrid" mission: (a) academic institution that serves (b) a professional service enterprise.

Categories for LOO 2 Objectives. The objectives, effects, and tasks for this LOO fall within three categories: Culture, Environment, and Infrastructure; Academic Titling and Promotion; and Composition of the Force.

1. Culture, Environment, and Infrastructure

Objective L2-1: An institutional culture, academic environment, and physical infrastructure to improve continually learning effectiveness and enable the successful achievement of student learning outcomes.

Effect L2-1.1: Enhancement of the overall student experience, academic and personal, through the continuous improvement of the learning environment, facilities, and institutional culture.

- a) *Task L2-1.1.1:* Implement processes and standards to foster student learning and ensure consistent, academic support functions are available across and within programs. Achieve a

college culture that places student learning first and strives to anticipate and foresight emerging requirements for the student learning experience.

- b) *Task L2-1.1.2:* Maintain and expand academic opportunities for JSOU students in areas of micro-credentialing, certificates, badges, etc. to provide increased application and recognition of student learning.
- c) *Task L2-1.1.3:* Allocate funds to create and build a teaching and learning center in order to provide additional support to both faculty and students.
- d) *Task L2-1.1.4:* Restructure and implement a University organization structure that reflects the priority for the three LOEs (T&L; R&A; S&O). Identify individual mission statements, tasks, lines of effort and organizational sub-elements to support the overarching University mission statement and LOEs.

2. Academic Titling and Promotion

Objective L2-2: Rational and attainable academic titling and promotion policies, and procedures that are fair, transparent, and reflective of JSOU values, and understood by all military and civilian faculty and non-faculty employees are implemented.

Effect L2-2.1: All faculty (military and civilian employees) understand academic titling and promotion requirements and discuss them with their supervisors during periodic performance reviews.

- a) *Task L2-2.1.1:* Draft a regulation that delineates requirements for JSOU Civilian and Military titling/promotion; incorporates the organizational values of JSOU; supports the Human Capital Strategy process and is discussed during onboarding and annually thereafter.
- b) *Task L1-2.1.2:* Provide all applicable employees training to understand the titling and promotion requirements.

Effect L2-2.2: All faculty are titled and promoted based on performance in conformance with the JSOU titling and promotion policy, procedures, and objectives.

- a) *Task L2-2.2.1:* Develop and incorporate a procedure in the JSOU academic promotion and titling policy for 1) faculty promotion or titling application; 2) documentation of employee performance and achievement; 3) provision for the establishment of an academic titling and promotion board comprised of diversely representative (i.e., school, civilian/military, race, gender, etc.) and academically qualified members; and 4) a board procedure that will fully evaluate the potential of each applicant to serve at the academic rank for which they applied when compared to a set of standardized, justifiable criteria that reflect the University's mission, needs, and values.

3. Composition of the Workforce

Objective L2-3: The composition of the JSOU workforce in size (numbers) and scope (expertise) to meet emerging University and Headquarters' needs is effective-costs managed.

Effect L2-3.1: The JSOU workforce is highly competent, forward-looking, able to develop curricula, and/or create and disseminate knowledge, and teach the next generation of SOF professionals.

- a) *Task L2-3.1.1:* Systematically conduct a skills-gap analysis to determine the skills, attributes, and experiences required of the JSOU workforce in comparison to the skills that currently exists.
- b) *Task L2-3.1.2:* Develop a recruitment and retention plan to align current and future skills-attributes-experiences, hire new faculty and staff as needed (including graduate assistants), and retain and/or reframe existing faculty and staff.
- c) *Task L2-3.1.3:* Develop a mechanism to identify and leverage expertise from outside of JSOU to serve as temporary/guest/visiting instructors, as well as affiliative and associative faculty and fellows, on an as needed basis (e.g., area universities, former or retired faculty, PME faculty, other appropriate experts, etc.).
- d) *Task L2-3.1.4:* Leverage the skills of all existing members of the current workforce to contribute collectively to our educational and leader preparation and development mission (e.g., contributing to an instructional or curriculum development task for students or the JSOU workforce, etc.).

LOO 3: SYSTEMS AND PROCESSES

Integrate, Expand the JSOU Net Estimate Development System (NED-S)

The JSOU “NEXT” running net estimate development system (NED-S) is guided by the 2018 National Defense Strategy, the May 2020 CJCS and Joint Chiefs of Staff Vision and Guidelines for improving and enhancing Joint Professional Military Education (JPME), USSOCOM Priorities, and the Commanding General’s Guidance letter (CGL) for JSOU. Ultimately, our new Charter is to... Be(come) SOCOM’s *Center of Joint SOF Thinking, Innovation and Experimentation Laboratory* on all things SOF education. JSOU “NEXT” must continuously review, renew, reorient, and reenergize itself and all our practices in ways that ‘Take the Lead’ on re-sharpening the edge of Special Operations’ enduring ethos of ‘The Quiet Professionals’ as SOF’s Advantage for Nation, not itself.

Problem Statement. As such, we must review, renew, reorient, and reenergize JSOU in ways that better allow us to do three important things: (1) “effectively anticipate war-fighter requirements;” (2) “challenge SOF’s current thinking with respect to roles and missions regarding GPC;” and (3) “Guard against ‘business as usual’ patterns to overcome continuation biases.

Categories for LOO 3 Objectives. The objectives, effects, and tasks for this LOO fall within three categories: Curriculum Refit Study and Design; Human Capital Strategy; and Classroom and Information Technology.

1. Curriculum Refit Study and Design

Objective L3-1: JSOU engagement in the processes and maintenance of the data necessary to make evidence-based program development decisions and demonstrate program effectiveness of achieving student transformation is assured.

Effects L3-1.1: Curriculum development and delivery is consistently reviewed, updated, normed, mapped, aligned, and responsive within programs to: legislative and strategic guidance and institutional goals, stakeholder and customer requirements, doctrinal changes, faculty input, student feedback, assessment data, and open to innovation.

- a) *Task L3-1.1.1:* Engage in an annual curriculum review process that includes the steps and considerations described below:
- i. *Task L3-1.1.1.1:* Develop measurable learning outcomes supported by appropriate module and course learning outcomes in order to ensure coherence and alignment. Such outcomes should pay special attention to describing and defining areas like: critical thinking, systems thinking, strategic thinking, and emotional intelligence to ensure the terms are used consistently throughout a pathway of learning. Learning outcomes should be clearly defined to know whether outcomes need to be reduced and to determine which outcomes should be prioritized.
 - ii. *Task L3-1.1.1.2:* Develop learning outcome maps to ensure modules and courses align with and support institutional and pathway learning outcomes.
 - iii. *Task L3-1.1.1.3:* Ensure direct (e.g. classroom examinations) and indirect (e.g. student feedback instruments) assessment models align with pathway learning outcomes and lesson objectives. Focus data collection efforts on the specific learning outcomes and classroom objectives and discontinue data collection efforts deemed irrelevant.
 - iv. *Task L3-1.1.1.4:* The determinations of the review should account for and accord with teaching methods and modes set forth in LOO 1.
 - v. *Task L3-1.1.1.5:* Ensure legal, doctrinal, accreditation, and institutional policies are accounted for, and the review process anticipates and prepares the curriculum for changes to such policies.
 - vi. *Task L3-1.1.1.6:* Ensure review addresses gaps or misalignments, student and stakeholder identified shortcomings are considered, and data-based decisions are documented. Changes to curriculum, courses, modules and lessons should be recorded for future reference and accreditation evaluation.
- b) *Task L3-1.1.2:* Evaluate and make evidence-based decisions for developing and adopting pathway learning outcomes as part of hybridized curricula, especially in regard to program duration.
- c) *Task L3-1.1.3:* Elicit data from the key stakeholders (USSOCOM, Component Commands and Sub-unified commands, etc.) to inform and strengthen the School-Stakeholder relationship and develop greater clarity of desired educational outcomes, shortfalls, and institutional limitations.
- i. *Task L3-1.1.3.1:* Short courses (i.e., modules) and certificate programs have intrinsic value to stakeholders and students. Assess the need for and consider adopting modules and offering programs that result in conferral of a certificate.
 - ii. *Task L3-1.1.3.2:* Use the data to identify, develop, and define unique attributes of programs and schools to optimize the placement of students into specific programs and courses to ensure qualification. Develop and publish guidelines and practices based on learning outcomes and data that facilitate placement, frame student expectations, and add to stakeholder understanding.

- d) *Task L3-1.1.4:* Provide input into the University's recruitment and retention plan that ensures adequate manpower to sustain fully the assessment, institutional research, faculty development, registrar, and accreditation requirements to support desired student outcomes.

2. Human Capital Strategy

Objective L3-2: A JSOU human capital strategy that includes Title 10 U.S.C. 1595 authorities to hire conditional, time-limited educators in accordance with DoDI 1402.06, and AFI 36-116 is developed and implemented.

Effect L3-2.1: The Human Capital Strategy ensures gaps and overlaps in Education and Leader Development for new or existing capabilities are assessed and addressed from a faculty talent management perspective.

- a) *Task L3-2.1.1:* Emphasize the "Why" behind adding the 'Excepted Service' (Title 10) Civilian Faculty talent line, further emphasizing the key requirements and benefits from this additional hiring capability.
- b) *Task L3-2.1.2:* Ensure the strategy provides the following benefits which are (but not limited to): enabling JSOU in the generation of ideas and educational "needs" necessary to contribute to the cyclically-changing NSS, NDS, and NMS in more anticipatory ways; enabling the enhanced conduct of 'basic' social science research; bringing in experts in their disciplines, allowing flexibility and adaptation in thinking discussed and directed in the Commander's Guidance Letter; bringing substantial money/cost savings, while also increasing JSOU Leadership 'developmental reach' for talent management purposes, as well as retain or release authorities over resident talent.
- c) *Task L3-2.1.3:* Tie all of the strategy justifications back to the 01 May 2020 CJCS and JCS Vision and Guidelines for JPME imperative of producing 'Intellectual Overmatch' within and across the SOF Profession.

3. Classroom and Information Technology

Objective L3-3: Student learning management systems, software, and hardware that allow for consistent application and seamless integration of technology in the classroom is developed and maintained.

Effect L3-3.1: Continuous information and data access, sharing, communication, and feedback through technology that minimizes administrative distractions and enables innovative teaching approaches and methods.

- a) *Task L3-3.1.1:* Undertake a faculty development program that helps faculty become better informed about technology and technology in the classroom to drive acquisition. The program should enable faculty to determine and communicate the technological resources necessary for innovative instruction and to identify the technology capabilities required to implement those approaches in the classroom.
- b) *Task L3-3.1.2:* Update and maintain the technology in classrooms to support current JSOU student technology policies to maximize student interactions with faculty, other students, and the learning process.
- c) *Task L3-3.1.3:* Advocate for employing adequate staff responsible for bridging backend IT requirements to instructional design and technology approaches in the classroom. The advocacy should consider all aspects of the IT lifecycle from conception, implementation, maintenance, and replacement.

JSOU Strategic Plan Implementation Process

The JSOU Strategic Plan Implementation Process will focus on continuous review and refinement. The plan is intended to be a living, active document that guides the University on its pathway to full implementation of the JSOU “NEXT”. The annual JSOU Academic Playbook will serve as the implementation (action) plan that will operationalize the three lines of effort within each of the University components. The Playbook will be produced annually but reviewed quarterly in order to capture ongoing and emerging requirements within the SOF enterprise.

The Office of Institutional Effectiveness is responsible for building and populating an assessment matrix that will clearly illustrate the accomplishments of the University’s LOEs and LOOs throughout the Strategic Plan implementation timeframe. The data will inform the JSOU leadership team of areas of success and opportunities for improvement and growth. The results will be published each year in the annual JSOU Factbook.