DEPARTMENT OF THE ARMY
OFFICE OF THE CHIEF OF STAFF
200 ARMY PENTAGON
WASHINGTON DC 20310-0200

11 July 2005

DACS-ZD

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Implementing Instructions for Secretary of the Army Transition Team

1. References.

a. Memorandum, Headquarters, Department of the Army, SASA, subject: *Secretary of the Army Transition Team (SATT) Charter*, 6 December 2004.

b. Briefing, Headquarters, Department of the Army, SASA, Secretary of the Army presentation during Army Executive Council (AEC), subject: *Philosophy and Management Style*, 6 January 2005.

c. Briefing, Headquarters, Department of the Army, SASA, SATT Panel Leaders presentation during Executive Office of the Headquarters (EOH) Forum, subject: *SATT Outbrief,* 30 March 2005.

d. Briefing, Headquarters, Department of the Army, SASA, Secretary of the Army presentation during AEC, subject: *Report of SATT*, 7 April 2005.

e. Memorandum, Headquarters, Department of the Army, DAPR-DPZ-A, subject: *Transforming the Way We Do Business* (Enclosure 3).

f. Memorandum, Headquarters, Department of the Army, SASA, subject: *Review of Education, Training, and Assignments for Leaders (RETAL)* (Enclosure 4).

2. Purpose. To implement the significant findings and recommendations of the SATT.

3. Discussion.

a. Intent. This memorandum sets in motion a process to implement the significant findings and recommendations of the SATT (references 1a-d). In some areas, such as business transformation, the concepts that were explored are already being acted upon (reference 1e). In other areas, such as Army-wide leader development, further study is required (reference 1f). The following general approach to implementation will be followed:

(1) ***Proponency for implementation is assigned at Headquarters, Department of the Army*** *(HQDA)* (reference 1d). **(Completed: 7 April 2005)**

(2) ***Panel Leads provide information to proponents.*** This will include all products produced by the panel during the SATT process to ensure thorough understanding of elements of consideration, findings, and recommendations. **(To Be Completed: May-July)**

(3) ***Proponents, assisted by Panel Leads, develop implementation plans.*** These plans will be developed in full coordination with appropriate Major Commands (MACOMs); Field Operating Agencies (FOAs); Direct Reporting Units (DRUs); and Army, Joint, and Defense agencies (as required). **(To Be Completed: May-August)**

(4) ***Proponents present plans for DAS, VCSA, CSA, USA, and SA approval, in order, in accordance with established milestones.*** **(To Be Completed: 9 September)**

b. Overview.

(1) Charter. The SATT was chartered in December to assist the Secretary of the Army to outline a vision, goals, objectives and performance metrics for his term in office. This effort will promote enhanced understanding as well as informed assessment of strategic direction and ongoing programs by leveraging the views of informed experts and ongoing studies within the Army and across the national security policymaking community.

(2) Organization. The SATT was chaired by the Honorable Martin R. Hoffmann, Secretary of the Army, 1975-77, and GEN(R) John W. Vessey, Jr., Chairman of the Joint Chiefs, 1982-85. Numerous other distinguished leaders, civilian and military, from industry, government, and other professions furnished advice during the SATT process. The exploration of assigned elements of consideration was conducted by four panels (Panel Leads in parentheses):

- **Vision and Strategy** (LTG William S. Wallace, Commanding General, Combined Arms Command and BG David A. Fastabend, Director, Doctrine, Concepts, and Strategy, Training and Doctrine Command)

- **Leadership and Culture** (MG Larry D. Gottardi, G1, Forces Command and Dr. Stephen D. Clement, Army Science Board)

- **Business Process Reform** (MG N. Ross Thompson III, Director, Program Analysis and Evaluation, Headquarters, Department of the Army)

- **Active-Reserve Balance** (Mr. Daniel B. Denning, Acting Assistant Secretary of the Army (Manpower and Reserve Affairs), Headquarters, Department of the Army, and MG David C. Ralston, Director of Force Management, G3, Headquarters, Department of the Army)

(3) Timing. The Transition Team initiated work on 6 January. This memorandum brings the Team's effort to a close. SATT participants will return to normal duties; however, participants and advisors will assist the proponents in developing and implementing their plans.

(4) Process. Findings and recommendations were developed through the use of informal methodologies, under the direction of the Panel Leads, structured to best fulfill the SATT charter. An interim update was provided to the Secretary of the Army in early February. A formal outbrief was provided in March. The Secretary briefed the Army's senior leadership (Assistant Secretaries and Staff Principals) in early April. The Secretary's presentation was highlighted by the announcement of an Army Vision Statement (reference 1b, Enclosure 1), that was approved for immediate release across the Army. Major and Senior Commanders will be briefed in May. Implementation Plans will be approved by mid-August.

(5) Chronology of Key Events.

- 3 December – Secretary notifies Secretary of Defense of SATT
- 6 December – SATT Charter approved
- 5 January – Initial Working Meeting
- 6 January – Secretary briefs his philosophy to Army Executive Council (All Assistant Secretaries and Staff Principals)

- 12 January – Initial briefing on SATT concept and organization to Secretary
- 10 February – Interim Report to Secretary
- 26 February – Senior Leader *Transforming the Way We Do Business* Seminar
- 30 March – SATT Panel Leaders present to Executive Office of the Headquarters (Secretary, Under-Secretary, Chief and Vice Chief of Staff)
- 7 April – Presentation to Army Executive Council
- 12 May – Memoranda addressing *Transforming the Way We Do Business* and *Review of Education and Training of Leaders* published
- 19-20 May – Concepts discussed with Major and Senior Army Commanders
- 11 July – Memorandum summarizing SATT published; Vision Statement released

(6) Projected Events.

- NLT 15 August – Supporting Strategic Communications Plan published
- NLT 9 September – Implementation Plans approved per the sequence established in paragraph 3. a. (4)

c. Panel Findings. The significant results of each panel – drawn from working papers used to support and report on panel activities – are summarized below.

(1) Vision and Strategy.

(a) Scope. Assess current vision and strategy with a view to determining adjustments that may be required.

(b) Key Findings.

- Context. The Nation has embarked on a protracted war – a war against an enemy that is highly adaptive, self-organizing, and exposes few traditional targets. To successfully advance U.S. national interests in the projected global security environment, America's Army must continue its efforts to reinforce the establishment of a joint, expeditionary mindset – with attendant intellectual, organizational, cultural, operational, and institutional implications. Service Title 10, U.S.C. roles and responsibilities are likely to remain essentially unchanged, yet the future mission set for the Army is likely to expand, consistent with national policy.

- Strengths. The Army's people are its greatest asset and its future. The Army's people embody Army Values and the Warrior Ethos and continue a tradition of sacrifice and duty established during 230 years of service to the Nation. The Army's status as an All-Volunteer force affords a two-fold advantage: first, a moral authority and flexibility that would be impossible for a conscript Army; second, a professional quality beyond the imagination of any conscript Army. The Army also has embraced a culture of innovation and adaptability in the Operational Army, where every military mission is viewed as unique and trained leaders apply a flexible decision making process guided by doctrine. This strength must be extended to – and become the foundation of – the Institutional Army.

- Vulnerabilities. The Army's mobilization process is inadequate for the 21st Century security environment. It is designed for national emergencies, not protracted conflict. This mobilization process, coupled with chronic shortfalls in key Soldier specialties (that a major rebalancing initiative is working to correct), contributes to a force that is over-stretched and operating at a pace that is not sustainable over the long term. The All-Volunteer force must not be taken for granted. The Institutional Army is a legacy of the industrial era in which it was

developed. Its processes do not adequately focus on warfighting support. This lack of focus is due, in part, to limitations in training, leader development, doctrine, and business systems and processes. These limitations inhibit the Institutional Army's capability to rapidly adapt and fully exploit technology and business reform opportunities. Some business processes (such as acquisition) do not reflect the modern business models of the society they serve – they are over-bureaucratized and over-managed. In addition, the inherent uncertainty and ambiguity of the 21st Century security environment, coupled with the complexity inherent in land warfare in a highly irregular environment, create the requirement for equally complex, sophisticated strategic messages. A failure to adapt communications processes has prevented the Army's Strategic Communications from achieving focus, clarity, and desired effects.

• Opportunities. The Global War on Terror and the uncertainty of the security environment create energy and opportunity for change. Funding pressure reinforces the need to better integrate best business practices and better position the Army for inevitable resource reductions in the future. There is growing recognition within the U.S. Government that the Army is a crucial enabler to the joint, interagency, and multinational force. Increased interagency and Army-to-Army engagements must foster continuing cultural change within the Army that will be needed to adapt and dominate across the range of military operations in the 21st Century security environment. The implications of this environment – specifically in the context of generating and sustaining forces in a sustained, high tempo environment – demands key changes in the operation and organization of the Institutional Army.

• Potential Challenges. The Army should posture itself to adapt to potential challenges such as: a significant decrement in funding; a shortfall in recruiting and retention; deterioration of the Army's basing and industrial infrastructure (physical plant) due to a funding shortfall; and a failure of the evolving force generation process to meet the demands of the 21st Century security environment.

• Primary Considerations for Vision and Strategy Development. Recognizing the many uncertainties associated with the environment and the increasing demands on the institution, the Army's strategy should: impart or accelerate momentum along the current trajectory and sustain it in spite of obstacles and challenges; make clearer the linkage between the many initiatives, programs, processes associated with the transformation of fighting forces and institutional practices; and build synergy in complementary transformational efforts intended to reform business processes, change Army culture, and achieve a more appropriate institutional-operational balance. The Institutional Army must adopt a culture and orientation to facilitate more responsive, flexible approaches to supporting the Operational Army, the transformation of which is now well underway.

(c) **Taskings for Proponent (Lead Agency: G3; Supporting Agencies: Chairperson, RETAL Task Force, Chief of Public Affairs, Others TBD).**

• Incorporate this vision into all relevant systems, processes, and doctrine.

• Achieve the intent for leader development by reviewing and updating Army training and leader development programs, as required, in full coordination with Chairperson, RETAL Task Force.

• Communicate Vision briefed by SA on 7 April to all relevant external and internal audiences.

(2) Leadership and Culture.

(a) Scope. Assess the current leadership and culture of the Army to determine if they are aligned with the objective realities of the 21st Century security environment; determine if leadership programs (military and civilian at all levels) are effective in developing the type of leaders that are needed to succeed in this environment; make recommendations accordingly.

(b) Findings.

• **Leadership.**

(1) Context. Development of leaders is essential for the profession and is a strength of the Army. The current combined result of training, education, and experience has developed leaders of character who have proven themselves to be innovative and adaptive on today's battlefield, both in combat as well as stability and reconstruction operations. Modern warfare will continue to present increasingly more demanding challenges – beyond those traditionally thought to be of a military nature; for example, stability and reconstruction efforts. Thus, we must leverage the unique skill sets resident in our civilian workforce to achieve desired operational and strategic objectives to best serve the Nation. Future programs must be directed to develop versatile leaders with the skills and experiences needed to succeed in evolving military, civil-military, and business enterprise settings – that will require leaders to develop solutions while operating amidst increasing complexity.

(2) Foundations. Leadership is the process in which one person sets the purpose and direction for one or more other persons, and gets them to work together while expressing their full individual competence, commitment (to organizational goals), and creativity. The object of leadership is to bring people together, to get them to work together as a team, to cooperate with one another, and to rely upon and trust one another as they strive toward accomplishing a common goal. To best harness human resources, senior leaders must perform the key task of establishing organizing structures and processes. Everyone – Soldiers and civilians – is capable of exercising leadership provided they are competent to perform in their assigned roles and their organization has properly instituted leadership practices.

(3) Development of the 21st Century Leader. As the world has become increasingly more complex, the demands on existing and future leaders have also become more complex. Thus, leader development programs are integral to the long-term survival of the enterprise. Tomorrow's leaders must become more competent to effectively cope with steadily increasing complexity. In other words, tomorrow's leaders must be capable of surpassing their counterparts of today. Developing leaders with the skills, knowledge, and attributes that the institution desires will involve more than varied job assignments to produce varied experiences. It will require a carefully thought out program that mixes experience with education and training to produce a leader well versed in both military and politico-military skills.

(4) Pentathletes. This leader – referred to as a "Pentathlete" – will be well versed in a range of areas, not just one discipline. The modern pentathlon features five disciplines: (1) shooting, (2) cross-country running, (3) swimming, (4) riding, and (5) fencing. To be successful, athletes must be proficient in all disciplines, not just one or two in which they specialize. Army leaders, both military and civilian, must be equally proficient in the skills they will need to be successful amidst the complexity inherent to current and future challenges. They must be motivated, educated, and, ultimately, prepared to demonstrate versatility and intellectual agility while serving as leaders – not just in shooting or running, but in all of the disciplines they will be required to master.

(5) Goal. Our goal is to "build" leaders – military or civilian – who have mastered their military or core career field tasks, and, in addition, have developed skills in the broader, more complex, politico-military arena. The military tasks are relatively easy to understand in concept, although extremely difficult to apply in practice. The more difficult description was the politico-military side, which will include basic proficiency in a foreign language, a general awareness of various cultures – their social mores, religious beliefs – and the development of a regional orientation based on a deep understanding of social, economic, and geographic understanding of native populations. Subsumed within this definition is the strongly held belief that we must work to develop within these leaders a mastery of core skills and cultural awareness and exposure that will enable them to operate amidst the increasing complexity of the 21st Century security environment.

• **Culture.**

(1) Context. Culture is the sum of our values and beliefs that serve as the framework for everything that we do; it is changing on the warfighting side, and must therefore change on the institutional side. Army culture is split between its military and civilian components – each reinforces and rewards different values. The ethos of the Operational Army must become the culture for the entire Army. While cultural change within the Institutional Army will occur naturally due to the challenges posed by the international security environment, we must not wait – *we must anticipate and drive the change process.*

(2) Desired Attributes. Elements of the new culture are beginning to crystallize. Included among these is a growing need to understand business enterprise principles – both to improve efficiency and effectiveness of institutional practices and to apply these principles in theaters of war during the conduct of stability and reconstruction operations. Other key attributes include:

• Promotion of the understanding that leaders may expect to be assigned in both institutional and operational settings, and that this practice will enhance, not hinder, both development and career progression.

• A renewed commitment to education, based on the view that education prepares leaders "how to think," and strengthens one's ability to think critically and to make accurate, informed decisions in complex, uncertain environments.

• Promotion of well-being, self-reliance, and resiliency among our families and our civilian workforce.

• Establishment of a command environment that rewards innovation, and empowers Soldiers, leaders, and civilians to use their initiative and adapt to rapidly changing operational environments.

(3) Measures of Success. When large, complex organizations pursue genuine transformational change, a key measure of success is leaders' ability to reorient peoples' attitudes, actions, and beliefs – Soldiers, families, and the civilian workforces, in the case of the Army. We must continue our work to create a culture that understands and embraces the objective realities of our military and organizational challenges within a dynamic, turbulent security environment. This will require that we continue to identify, isolate, and change behavior. To win the war while transforming – and provide relevant, ready Landpower in service to the Nation – this is what our leaders must do … change behavior.

(c) **Taskings for Proponent (Lead Agency: ASA(M&RA); Supporting Agencies: G1, G3, and Commandant, U.S. Army War College).**

• Align policies, programs, systems, and procedures to realize the Army Vision.

• Execute a comprehensive Review of Education, Training and Assignments for Leaders (Military and Civilian) to achieve the intent of the directive (Enclosure 4); the summary paper produced by this panel (Reference 1f, Enclosure 2); and the observations and findings with respect to the following four areas examined by the SATT: (1) Army Vision Statement, (2) "Pentathlete" concept, (3) desired attributes for Army Culture, and (4) goals for the optimal developmental path that should be established to "Build 21st Century Leaders."

• Explore the feasibility of merging Army military and civilian executive personnel systems and develop an appropriate recommendation.

(3) Business Transformation.

(a) Scope. Assess the effectiveness, efficiency, cycle time, and overall conduct of Army business practices and processes with respect to best practices and standards of measurement (metrics for performance and process improvement) in use in the Government and in the civilian sector.

(b) Findings. There exists a need to:

• Establish an Office of the Executive Director for Institutional Army Transformation, to be guided by a senior executive to coordinate the Army's business transformation and ensure actions in this realm remain consistent with the Army's strategic priorities.

• Develop a program to include business education in Army executive level training and throughout our Professional Military Education (PME) system.

• Develop review and analysis systems – focused to give visibility of the status of business transformation – across the Army.

• Develop a system of structured command reviews in this area.

• Develop a web portal to promote greater understanding of, and information on, business transformation.

(c) **Taskings for Proponent (Lead Agency: Executive Director for Institutional Army Transformation; Supporting Agency: G8).**

• Lead a process to immediately implement the principles of Lean Thinking and Six Sigma to eliminate non-value added steps in Army processes and systems (reference 1e).

• Distribute guidance capturing the intent of SA and CSA (Enclosure 3).

• Distribute guidance, in the form of a "deployment plan," to explain how training will be provided to each MACOM and HQDA principal, and what will be required of all MACOMs, DRUs, and FOAs to lead business transformation within their respective organizations.

• Establish procedures to report on progress and to schedule and conduct reviews for senior leadership.

• Establish an Office of the Executive Director for Institutional Army Transformation that will oversee business process reform and Institutional Army Transformation initiatives.

• Leverage work to date by the Office of Institutional Army Adaptation (OIAA) to achieve the initial intent (captured in the Army Campaign Plan and the FY 05 Game Plan) established for this effort, i.e., "identify how effectiveness and efficiencies can be gained (e.g., Can processes be adapted? Structures or regions consolidated?)"

• Develop an output-oriented performance management system to be used to support departmental level assessments of performance relative to the "Strategic Framework," enumerated in the 2005 Army Posture Statement, and progress in executing major business decisions.

(4) Active-Reserve Balance (evolved from Institutional-Warfighting Balance).

(a) Scope. Assess the size and composition of the active and reserve components of the Army with a view to determining their feasibility to support the Army Force Generation Model (ARFORGEN) and fulfill the full range of global strategic requirements derived from the National Military and Defense Strategies.

(b) Findings.

• Establish a Special Study Group to support the National Commission on Reserve Component Issues (Punaro Task Force).

• Determine appropriate roles and missions for the Guard and Reserve in the 21st Century security environment.

• Leverage the work of this Special Study Group to support the Quadrennial Defense Review, Army Focus Areas, and other relevant studies and initiatives.

(c) Taskings for Proponent (Lead Agency: G3; Supporting Agencies: ASA(M&RA); G-8 Quadrennial Defense Review Office; Executive Director for Institutional Army Transformation; ASA(M&RA), Others TBD).

• Establish and man a Special Study Group to support the National Commission on Reserve Forces (Punaro Group).

d. Coordinating Instructions.

(1) All HQDA and MACOM proponents will integrate the intent of the key findings and recommendations into the systems and processes that they have proponency for. These include, but are not limited to: Quadrennial Defense Review, FY 06 Game Plan (to assist in informing the field of key SATT findings), Army Strategic Planning Guidance, Army Campaign Plan, FM 1.0 (*The Army*), FM 22-100 (*Leadership*), National Security Personnel System, 2006 Army Posture Statement, etc.

(2) Key Milestones.

- NLT 15 August – Supporting Strategic Communications Plan published
- NLT 9 September – Implementation Plans approved per the sequence established in paragraph 3. a. (4)

(3) Oversight of Implementation. The Special Assistant to the Secretary of the Army will oversee execution of milestones and facilitate the approval process by the Secretary of the Army.

4. Point of Contact. Mr. Thomas E. Kelly III, Special Assistant to the Secretary of the Army, (703) 697-3001, or COL Mark D. Rocke, Director, Executive Office of the Headquarters Staff Group, (703) 697-3920.

BY ORDER OF THE SECRETARY OF THE ARMY:

JAMES L. CAMPBELL
Lieutenant General, U.S. Army
Director of the Army Staff

4 Enclosures
1 – Army Vision Statement
2 – Leadership Paper
3 – *Transforming the Way We Do Business*
4 – *Review of Education, Training, and Assignments of Leaders*

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US Army Space and Missile Defense Command
Military Surface Deployment and Distribution Command
US Army South
US Army Military District of Washington
US Army Criminal Investigation Command
US Army Intelligence and Security Command
US Military Academy

ENCLOSURE 1

Army Vision:

Relevant and Ready Landpower in Service to the Nation

The Nation has entrusted the Army with preserving its **peace** and **freedom**, defending its **democracy** and providing **opportunities** for its Soldiers to **serve** the country and develop their skills and citizenship. Consequently, we are and will continuously strive to remain among the most respected institutions in the United States.

To fulfill our **solemn obligation** to the Nation, we must remain the **preeminent** landpower on earth—the **ultimate** instrument of national resolve. We intend to meet this obligation through a **synergistic combination** of:

- **Soldiers**
- **Leaders**
- **Modular Forces**
- **The Institution**

That are **totally prepared** to meet the challenges of the **dangerous** and **complex** 21st Century Security Environment and are characterized by the following:

Army Vision:

Relevant and Ready Landpower in Service to the Nation

To fulfill our **solemn obligation** to the Nation, we must remain the **preeminent** landpower on earth—the **ultimate** instrument of national resolve. We intend to meet this obligation through a **synergistic combination** of:

- **Soldiers:** The centerpiece of all we are and do. Living the Warrior Ethos, inspired by the Army's enduring traditions and heritage. Soldiers and statesmen reflecting America's values, the best citizens the Nation has to offer—on duty protecting the Nation and the society they serve.

- Leaders
- Modular Forces
- The Institution

Army Vision:

Relevant and Ready Landpower in Service to the Nation

To fulfill our **solemn obligation** to the Nation, we must remain the **preeminent** landpower on earth—the **ultimate** instrument of national resolve. We intend to meet this obligation through a **synergistic combination** of:

- ❑ Soldiers
- ❑ **Leaders:** Innovative, adaptive, culturally astute professionals. Demonstrating character and integrity in all they do. Expert in the art and science of the profession of arms. Confidently leading the Soldiers and civilians of our Army. Leading change, building teams, boldly confronting uncertainty, and solving complex problems while engendering loyalty and trust.
- ❑ Modular Forces
- ❑ The Institution

Army Vision:

Relevant and Ready Landpower in Service to the Nation

To fulfill our **solemn obligation** to the Nation, we must remain the **preeminent** landpower on earth—the **ultimate** instrument of national resolve. We intend to meet this obligation through a **synergistic combination** of:

- ❑ Soldiers
- ❑ Leaders
- ❑ **Modular Forces:** Rapidly-deployable, full-spectrum, networked, adaptive, and increasingly more powerful. Enabling interdependent, joint and expeditionary operations with interagency and multinational partners. Executing protracted campaigns to protect freedom; to deter adversaries; and if required, to defeat our enemies; secure peace; and conduct stability and reconstruction operations.

- ❑ The Institution

Army Vision:

Relevant and Ready Landpower in Service to the Nation

To fulfill our **solemn obligation** to the Nation, we must remain the **preeminent** landpower on earth—the **ultimate** instrument of national resolve. We intend to meet this obligation through a **synergistic combination** of:

- ❑ Soldiers
- ❑ Leaders
- ❑ Modular Forces

❑ **The Institution:** Providing ready and relevant land forces and capabilities to the Combatant Commander while transforming. Leading change to create the future Army. Providing the people, resources, quality of life, and infrastructure critical to the success of America's Army.

ENCLOSURE 2

SASA 29 March 2005

MEMORANDUM FOR Secretary of the Army
Undersecretary of the Army
Chief of Staff, Army
Vice Chief of Staff, Army
Director of the Army Staff
Sergeant Major of the Army

SUBJECT: Read-ahead, Executive Office of the Headquarters Forum, 30 March 2005

1. General.

The focus of the Secretary of the Army's Transition Team Leadership and Culture group revolved around two sets of open-ended questions: (1) Do current leader development programs (training, education, and experience) promote or hinder the development of 21st century leaders and How are 21st century leaders different than those developed in the past?; and (2) Does Army Culture create the environment in which 21st century leaders may develop and grow?

2. Leadership Foundations.

Effective leadership is one of the most valued of all human activities. To be known as a good leader is a much sought after accolade. It signifies the capability to bring people together, to get them to work with one another as an effective team, to cooperate and trust one another, and to rely upon each other as they strive toward accomplishing a common goal. A primary outcome of good leadership is organizational effectiveness seen in high performing teams.

But effective leadership is also seen as one of the most mysterious of human activities. This view is wrapped up in the notion that charisma is a divinely bestowed magnetism and talent, with which some people have been graced. Charisma enables those who have been bestowed – almost magically it would seem – to win the staunch devotion of others and to get them to work together. This view is discouraging because it centers on the notion that if you are born with only a limited amount of God-given charisma and leadership ability, then you must be content with manifesting only limited degrees of leadership within your lifetime.

The leadership dichotomy above can easily be reconciled by understanding and applying the following two concepts. The first point is that the concept of leadership is rarely defined with any precision. To alleviate this concern, the Transition Team offers the following definition:

> Leadership is that process in which one person sets the purpose or direction for one or more other persons, and gets them to move or work together while expressing their full creativity.

This definition of leadership as a process is intended to express what leadership is about. It is not intended to describe how one goes about the process of achieving it, or the mental characteristics and organizational conditions necessary for doing so.

The second point is that leadership is not a free-standing activity; it is one function, among many, that occurs in some but not all roles. Organizations exist to get work done,

which is what they are all about. And work gets done by people who occupy roles in an organizational structure. Roles contain specific properties such as accountability and authority. These properties establish the context within which work – and all individual behavior – takes place. Roles, in turn, are aggregated into a hierarchical structure designed specifically to facilitate the work process. Structure also provides the linkage between interacting roles. Role clarity and value-adding working relationships are central to achieving organizational effectiveness. The establishment of requisite structures is a key task of the senior level leadership in every organization.

The proposition that leadership is associated with some roles in a social structure is important because it supports the introduction of the following thesis: Everyone is capable of exercising effective leadership in roles that carry leadership accountability, as long as they value the role and are competent to perform the basic requirements of that role, and as long as that role is properly structured and the organization has properly instituted leadership practices.

For effective leadership to occur, the following psychological and organizational conditions must be established:

a. Psychological Conditions of Leadership.

The ability to exercise leadership is not some great "charismystery" but is, rather, an ordinary quality found in every person so long as the following condition exists. The major psychological condition in command or managerial leadership is the individual's personal capability to exercise the functions and duties of the command or managerial role. One cannot exercise effective leadership unless one has the necessary capability to carry out the managerial or command work required of the role, at the level of complexity or capacity that matches the level of work in the role. If we cannot discharge all of the functions of our role we do not have the ghost of a chance of exercising leadership in relation to others since there is no way in which those others will have confidence in us.

The other psychological condition in command and managerial leadership is the ability to earn trust and respect from others. Gaining this trust and respect depends mainly on the sensible and consistent application of required practices, e.g., assessing tasks, conducting performance reviews, coaching and mentoring, and accomplishing the mission.

b. Organizational Conditions of Leadership.

Requisite organizational structure is the absolute foundation for effective leadership. For example, clearly structured units and echelons are essential for commanders of units at every echelon to be able to move readily and rapidly and to deploy the capabilities of their organizations to accomplish assigned missions. This dependence on organization is why the military has been intensely preoccupied with continual organizational experimentation since the time of Alexander. Further, planning, information, communication, clear operation orders and follow-up must be perfected to the "nth degree" for combat. Thus, the emphasis lies upon the competent commander (or manager) working in a sound organizational structure.

Central to establishing sound structure is properly designed hierarchical layering, since hierarchical layering is what these organizations are about. This layering stems from the commander–subordinate relationship or in case of business, the manager–subordinate relationship, which is precisely and exclusively what organizational layers are all about.

Those in one layer delegate work to those, called subordinates, in the layer immediately below; and they can be held accountable for the output of those subordinates. Establishing too many layers (or too few) creates a situation in which superior–subordinate accountability cannot be established. The proper number of layers in any organizational structure is determined by providing for effective superior-subordinate accountability to get work done, beginning with the most senior role in the organization as established by the mission.

When this principle is applied to the Army, it is apparent that there needs to be no more than seven organizational layers from the Chief of Staff down to the individual soldier. Further, these layers naturally break out into three separate parts: tactical, operational and strategic.

c. Tactical Leadership.

Tactical leadership encompasses Levels I-III in the organization. It is at these levels where the leadership process takes on an aura of personal, face-to-face, interaction between the leader and his or her followers. This is the tier in which the leader has personal knowledge about all of his or her people. This knowledge extends to detailed information about a subordinate's personal situation, his or her family needs, and other issues that may contribute to or detract from a sense of personal drive and motivation. This relationship is characterized as a mutual knowledge unit. At Level III, the Battalion, it is impossible for the leader to personally know all of his or her people. What is possible, however, is that they all recognize one another as belonging to the same unit. Thus, this level is referred to as a mutual recognition unit.

d. Operational Leadership.

Operational leadership occurs at Levels IV and V. These levels consist of "stand-alone" units (such as the division) which perform all of the roles required for autonomous functioning on the battlefield. At these levels, anonymity sets in. The focus is on total system operations. Key metrics that apply at the operational level are system performance data.

e. Strategic Leadership.

The top tier of leadership is focused on running the whole organization. This includes Levels VI and VII. At these levels, policies are formulated, vision and strategies are created and the future direction of the enterprise is envisioned and established. Strategic leaders are also charged with articulating corporate values and establishing a supportive enterprise culture to ensure that the work of the organization gets carried out effectively.

The task of developing future leaders is an inherent part of the enterprise talent pool management system. The senior leaders in the enterprise need to meet periodically to discuss the health of the current talent pool and decide on key developmental moves required to successfully grow the next generation of leaders. Over the years, the Army has done a better job of this with its General Officers than it has with its senior civilian leaders.

As the world has grown more complex, the demands on existing and future leaders have also grown more complex. Thus, leader development programs are integral to the adaptation, growth, and survival of the enterprise over the long-term. However, it is no longer sufficient to simply replace today's leaders with competent successors. To effectively cope with steadily increasing levels of complexity, tomorrow's leaders must become

increasingly more competent. In other words, in terms of creativity, decision making, and overall performance, the leaders of tomorrow must "surpass" their counterparts of today.

Thus, great care must be given to the design and implementation of the leader development programs. While skills and knowledge are an important part of any such program, they are by far not the most important element. Varied job assignments coupled with varying experiences are critical to individual development. However, leader development does not depend on individuals rotating through all possible assignments. Rather, it requires a carefully thought out program that mixes experience with education and training. Designing a program to produce "Pentathletes" should be a primary duty of the Army's senior leadership. The following discussion highlights key features of such a program.

3. Development of the 21st Century Leader.

We used the short hand description "pentathlete" to describe the desired 21st century leader. Our use of this expression refers to a leader – military or civilian – who has experienced a balanced developmental path in which they have demonstrated their mastery of their military or core career field tasks and, in addition, have also demonstrated their grasp of a range of key skills in the broader politico-military arena.

a. Skill Mastery. Defining the mastery of military or technical skills was relatively easy; for instance, completion of training at various levels as a noncommissioned officer or, as illustrated, for an infantry officer – Basic Officer Leader Course (BOLC), Captains' Career Course (CCC), Intermediate Level Education (ILE), and Senior Service College (SSC) – and completion of related developmental assignments. For the civilian this mastery would involve any number of courses – Sustaining Base Leadership and Management (SBLM) course, Professional Military Education (PME), and, as appropriate, the Defense Leadership and Management Program (DLAMP) – and completion of similar developmental assignments.

b. Political-Military Awareness. The more difficult description to craft was the politico-military side, which we defined to include basic proficiency in a foreign language, a general awareness of various cultures – their social mores, religious beliefs – and a desired focus on a particular area of the world requiring knowledge of its native populations. Subsumed within our definition was our strongly held belief that we must work to develop leaders who, with their combined mastery of core skills and cultural awareness and exposure, were more capable of heuristic development than our leaders have been in the past. One of the most important characteristics in this area was the ability to think creatively and critically, which we defined as using highly developed military and politico-military skills to promote – and not to inhibit or restrict – adaptive and innovative decision making.

c. Decision-Making Skills. If asked to describe our desired leader, we could use examples of trained, experienced experts who possess an uncanny ability to make correct and invariably accurate decisions in the "blink" of an eye, without the need of lengthy explanation and examination of information. We believe that our model of the "Pentathlete" defines this type of person – one who can make the rapid, informed decisions we expect of our leaders, while drawing upon the knowledge and experience gained from a number of educational and developmental experiences, without stopping to consider which body of knowledge makes the decision "the right one." In short, this desired level of decision making ability results from being able to "go with the gut" instinct, developed and refined from years of preparation in several areas of expertise.

4. Army Culture in the 21st Century.

In the course of our study, we have encountered multiple definitions of culture used by the Army and any number of sociologists and psychologists. The one that we consider to be the most precise and inclusive is that crafted by Dr. Edgar Schein, professor at the Massachusetts Institute of Technology's Sloan School of Management, one of the modern "founders" of organizational psychology.

a. Culture Defined. Schein defines culture using "six formal properties: (1) shared basic assumptions that are ... (2) invented, discovered, or developed by a given group as it ... (3) learns to cope with its problem of external adaptation and internal integration in ways that ... (4) have worked well enough to be considered valid ... and therefore, (5) can be taught to new members of the group as the ... (6) correct way to perceive, think, and feel in relation to those problems."

b. Culture's Importance. In other words, culture may be defined as the sum total of all that has made us what we have been, what we are, and – most importantly – what we will be. We have also been mindful in our discussions that we must not begin with the idea of changing culture, but rather to focus on those issues the Army faces, and ask whether the culture aids or helps in resolving those issues.

5. General Discussion of Conclusions.

a. The Developmental Path. Development of leaders, as discussed earlier, is essential for the military profession and is a strength of the Army. The current combined result of training, education, and experience (TEE) has developed leaders of character who have proven themselves to be innovative and adaptive on today's battlefield, both in combat and in stability and reconstruction operations. To achieve our desired attributes in our leaders, we must fully leverage the considerable leadership and technical skills resident in the senior civilian workforce. We must now ensure that any future programs and TEE promote the development of the leaders we desire to create, both military and civilian, in ever larger numbers to meet our needs on the battlefield and in our enterprise operations. We must ensure that:

(1) Both military and civilian personnel management systems provide a base template that fully addresses a desired career path and directs that required training for soldiers and civilians.

(2) Personnel management systems permit the flexibility for early identification of emerging leaders and the means to implement non-standard TEE to fully develop those leaders.

(3) Our menu of training and education programs fully and directly addresses and promotes the development of desired leader skills – creating standardized language training programs and creating area awareness programs focused on the "arc of crisis."

(4) We do not use critical thinking as merely a buzzword, but think of it as a skill to be promoted through a variety of education and training programs – specifically Advanced Civil Schooling (ACS) and Training with Industry (TWI) – in a number of areas of study and employment.

(5) Performance evaluation systems focus on desired traits and skills – not just

boilerplate block checks – and serve effectively to assess performance at grade levels based on the traits and skills desired at the evaluated level.

(6) We fully leverage the abilities of our senior civilian leaders in conjunction with our senior military leaders. We must manage senior levels as one force, with General Officer (GO) and Senior Executive Service (SES) positions more closely aligned, and fewer barriers to assignments across the operational and institutional Army.

b. Army Culture.

(1) Context. Culture is the sum of all we do; it is changing on the warfighting side, and must therefore change on the institutional side. Army culture is split between its military and civilian components; each reinforces different values. The ethos of the Operational Army must become the culture for the entire Army. While cultural change within the Institutional Army will occur naturally due to the challenges posed by the international security environment, we must not wait – we must anticipate and drive the change process.

(2) Desired Attributes. Elements of the new culture are beginning to crystallize. Included among these is a growing need to understand business enterprise principles – both to improve efficiency and effectiveness of institutional practices and to apply these principles in theaters of war during the conduct of stability and reconstruction operations. Other key attributes include:

• Promotion of the understanding that leaders may expect to be assigned in both institutional and operational settings, and that this practice will enhance, not hinder, both development and career progression.

• A renewed commitment to education, based on the view that education prepares leaders "how to think," and strengthens one's ability to think critically and to make accurate, informed decisions in complex, uncertain environments.

• Promotion of well-being, self-reliance, and resiliency among our families and our civilian workforce.

• Establishment of a command environment that rewards innovation, and empowers Soldiers, leaders, and civilians to use their initiative and adapt to rapidly changing operational environments.

(3) Measures of Success. When large, complex organizations pursue genuine transformational change, a key measure of success is leaders' ability to reorient peoples' attitudes, actions, and beliefs – in the case of the Army, our Soldiers, families, and civilian workforce. We must continue our work to create a culture that understands and embraces the objective realities of our military and organizational challenges within a dynamic, turbulent security environment. This will require that we continue to identify, isolate, and change behavior. To win the war while transforming – and provide relevant, ready Landpower in service to the Nation – this is what our leaders must do ... change behavior.

c. Areas for Possible Tasking to Key Organizational Proponents (G1, ASA(M&RA), and G3).

(1) Align policies, programs, systems, and procedures to realize the Army Vision.

(2) Execute a comprehensive Review of Training, Education, and Assignments of Leaders (Military and Civilian) to achieve the intent of the findings and recommendations outlined above and the following four areas examined by the Secretary of the Army's Transition Team: (1) Army Vision Statement, (2) "Pentathlete" concept, (3) desired attributes for Army Culture, and (4) goals for the optimal developmental path that should be established for "Building 21st Century Leaders."

(3) Explore the feasibility of merging Army military and civilian executive personnel systems and develop an appropriate recommendation.

6. Summary. Implementation of the changes in leader development and Army culture, discussed conceptually in these Working Papers, will go a long way toward alleviating the transition problems faced by many of our senior warfighting leaders who suddenly find themselves assigned to the business/enterprise side of the institution.

LARRY D. GOTTARDI
Major General
U.S. Army

ENCLOSURE 3

DEPARTMENT OF THE ARMY
WASHINGTON, DC 20310-0200

JUL 11 2005

MEMORANDUM FOR MACOM COMMANDERS

SUBJECT: Transforming the Way We Do Business

1. The Army is in the process of implementing the most dramatic changes to the design of our operating forces in 50 years. We are transforming our force structure to realize the Army Vision: *"Relevant, and Ready Landpower in Service to the Nation."* To this end, we are developing Soldiers, leaders, and modular forces to ensure the Army remains the preeminent land power on earth and the ultimate instrument of national resolve. It is time to extend this same mindset to the Institutional Army in order to ensure its ability to provide the people, training, resources, quality of life, and infrastructure that will be critical to the continued success of America's Army.

2. The institutional activities that generate relevant and ready forces are the "business" end of our Army. In order to provide responsive, innovative, and efficient institutional support, we must dedicate ourselves to "transforming the way we do business." To achieve this goal, improve effectiveness, and identify the efficiencies that will free human and financial resources to better support operational requirements, we can learn much from civilian business practices.

3. The most successful corporations in the world have used proven methodologies to provide better value to their customers by increasing responsiveness and decreasing cycle time in all processes and activities. To meet the challenges posed by an ambiguous, uncertain international security environment, the Army must achieve the same high level of continuous, measurable improvement in its business processes and functions.

4. Examples from industry tell us that we can achieve improved efficiency and, more importantly, that total success will only result from sustained commitment to process improvement over the long term. We must actively lead business transformation, educate the workforce on what is expected, and execute in a structured, disciplined, and methodical fashion.

5. To begin this effort, we will take the following actions:

a. To assist us in providing guidance and leadership focus on this effort, this headquarters is establishing the Office of the Executive Director for Institutional Army Transformation. A senior executive will coordinate the Army's business transformation and ensure that our actions in this area remain consistent with the Army's strategic priorities. Each Army Major Command (MACOM) will designate a champion to lead business transformation within their respective organizations. This champion must have the leadership skills and authority to implement the changes determined by your detailed assessments and analyses of various business processes.

b. The methodologies that will make our business transformation successful are not inherent to our existing Army culture. To address this shortfall, business education will be included in Army executive-level training and integrated across all aspects of our military and civilian professional education systems. As an immediate action, the Navy will provide a limited number of enrollments for Army leaders in its Executive Business Course. The General Officer Management Office and the Senior Executive Service Management Office will manage attendance at this course.

c. As part of your implementation of business transformation, we want you to make an assessment of the baseline for each of your major processes in terms of dollars, manpower, time, and desired process outputs. Next, identify those areas of your command that will most readily accept and benefit from changes driven by business transformation. This assessment will logically lead to a prioritization of processes to be transformed, which will, in turn, support your decisions regarding how to best structure and implement business transformation.

d. There is much to be learned from successful efforts in industry. To share and promote understanding of these lessons, the Army is developing a web portal to provide information on business transformation. This site, available through Army Knowledge Online (AKO), will provide training resources, relevant information, and a current status of the Army's business transformation efforts. This portal is already fully functional and available for your use.

e. Finally, we are personally committed to leading these changes. Business transformation is critical to the Army's continued success. As a part of our visits to MACOMs, headquarters, and other organizations across the Department, we will review assessments and plans for transforming how we do business. We will continue to review progress in meeting business transformation objectives on a regular basis, and will provide additional guidance to establish common expectations and standards for these reviews.

6. The methodologies of successful business corporations provide a proven framework for achieving sustained improvement of processes. The manner in which we adopt this framework - and apply proven principles of managerial excellence - will ultimately decide our success in this endeavor. The Army must make pursuit of continuous, measurable improvement a vital underpinning of the adaptive, learning culture which we are building. We challenge each of you to continue to instill this mindset throughout your organizations. The increased focus on measuring results brought about by your personal leadership will ensure that the Army realizes evolutionary transformation in all its processes, and ultimately benefits from revolutionary outcomes.

Peter J. Schoomaker
General, United States Army
Chief of Staff

Francis J. Harvey
Secretary of the Army

ENCLOSURE 4

DEPARTMENT OF THE ARMY
OFFICE OF THE CHIEF OF STAFF
202 ARMY PENTAGON
WASHINGTON DC 20310-0202

6 July 2005

SASA

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Review of Education, Training, and Assignments for Leaders (RETAL) Task Force

1. PURPOSE. This memorandum provides for the establishment of the RETAL Task Force within the Executive Office of the Headquarters (EOH), Department of the Army.

2. MISSION. The RETAL Task Force will examine the policies and programs that govern the education, training, and assignments of Army leaders with a view to determining how to best develop the "pentathletes" required to operate confidently and effectively amidst the complexities and challenges of the 21st Century national security environment (Attachment A). The central question the Task Force must answer is: ***How should the Army develop its military and civilian leaders, who will serve in both operational and institutional capacities, to become the "pentathletes" needed to operate and win in this new environment?***

3. DESIGNATION OF CHAIRPERSON. A Chairperson for the RETAL will be designated by the Secretary of the Army (SA) and the Chief of Staff, Army to direct this review. The Chairperson will be a General Officer, with the requisite intellectual and experiential attributes, to perform two distinct duties: (1) organize and execute the overall Review; and (2) direct the examination of policies and programs related to officer development, for both active and reserve components. Guidance.

a. The Chairperson will develop and obtain approval for a plan to execute this review within 30 days of his formal designation.

b. Approval sequence will be: Director of the Army Staff (DAS), Vice Chief of Staff, Army (VCSA), CSA, Under Secretary of the Army (USA), and SA, in order. This plan will include a concept to man the review (i.e., an Executive Officer, Team Leaders, Action Officers, and Consultants, as required).

c. Two Vice Chairpersons will be designated to assist the Chairperson to accomplish these tasks. One will be a member of the Senior Executive Service (SES), appointed by the Secretary of the Army to examine civilian leader development. The other will be a Command Sergeant Major (CSM), appointed by the Sergeant Major of the Army (SMA) to examine noncommissioned officer (NCO) leader development. (NOTE: The SMA will serve in an advisory capacity on all matters pertaining to leadership development across the Army.)

4. TASKS. The Task Force will accomplish the following tasks:

a. Review the studies, across the Government and within the Department of Defense and the Department of the Army, that have had the greatest influence on current policies and programs for leader development.

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b. Review the Army's major ongoing leader development studies and its principal organizations focused in this area (e.g., Officer Personnel Management Study 3, examinations of Officer and Noncommissioned Officer Education Systems (OES and NCOES), Strategic Army Workforce Study (SAWS), Center for Army Leadership (CAL), Army Training and Leader Development Panels (ATLDPs), etc.) Examine the study charters and organizational mission statements of each to determine if and how they should be updated in light of the newly crafted concept of the "pentathlete" (Attachment A). Frame a working definition of this concept, refining what has been developed to date if necessary, and recommend how it should be integrated into Army policies, programs, and doctrine for leader development. Determine if and how the various studies are integrated to inform one another and to focus on common Army-wide ends. Determine how to best leverage the considerable work already conducted with respect to leader development – as well as the organizational structures already in place – to accomplish the mission assigned to the RETAL Task Force. Provide an integrating function – serving in a sense as an "umbrella" – for the studies and organizations listed above.

c. Identify and assess existing Army policies and programs for military and civilian leader development with a view to producing "pentathletes."

d. Draw upon the experiences, observations, and insights of noted leadership experts (both civilian and military, active and retired).

e. Specify changes and revisions to existing education, training, and assignment policies and programs to provide for an optimal developmental continuum (Attachment B).

f. Focus its examination of commissioned officers from pre-commissioning through career completion.

g. Focus its examination of NCOs on educational and development programs designed for senior noncommissioned officers, in the rank of Staff Sergeant to CSM.

h. Focus its examination of civilians on educational and development programs designed to produce leaders with the leadership abilities commensurate with their assigned supervisory duties at intermediate levels and higher.

i. Recommend changes and revisions that address both individual self-development activities and those intended to occur during assignments and during formal schooling and training.

j. Design these programs with the prospect of implementation in a constrained resource environment.

k. Present these programs for approval to the Secretary and Chief of Staff, Army; and coordinate the integration of approved programs into the FY 07-11 program.

l. Conduct analysis and report out using the Illustrative Terms of Reference as a guide to focus study efforts (Attachment C).

5. COMPOSITION AND MANNING. The leadership of the RETAL Task Force will consist of a General Officer (Chair), an SES civilian (Vice Chair), and a CSM (Vice Chair). This leadership will be supported by an Executive Officer (0-6). Guidance:

a. The Chair will make a final determination and obtain approval for personnel to conduct this review, in terms of both seniority and competencies, based upon the scope, organization, work plan, timeline, and administrative support concept approved for this review.

b. These personnel will include Team Leaders (0-6 and 0-5), Action Officers (0-5, 0-4, and NCOs), consultants, and National Security Personnel System (NSPS) Highly Qualified Experts.

c. To minimize the personnel overhead, promote coherence, and ensure linkage to recent and ongoing leader development studies and related initiatives, the Task Force will leverage the efforts of the studies and organizations referenced in para. 4b) to provide additional personnel.

d. The Assistant Secretary of the Army (Manpower and Reserve Affairs) will be charged to fill these personnel requirements to provide the human resources required by the Chairperson, RETAL.

6. STAFF RELATIONSHIPS.

a. The Chairperson, RETAL, reports directly to the Secretary of the Army and the Chief of Staff, Army.

b. The Chairperson, RETAL is authorized direct access to Army and other Service Staff Agencies, the Office of the Secretary of the Army, the Office of the Secretary of Defense, Army Major Commands (MACOMs) and their sub-elements, Direct Reporting Units (DRUs), and Field Operating Agencies (FOAs).

c. The Chairperson, RETAL, has delegated authority of the Secretary of the Army and the Chief of Staff, Army within the policy guidance prescribed in the mission statement (para. 3).

d. The Chairperson, RETAL, will maintain close and continuous coordination with the Army Staff and MACOMs. Establishment of this group does not relieve Army Staff elements and MACOMs of their assigned staff and command responsibilities.

7. CONSULTING BODY. A consulting body will be established as a study board to vet proposed recommendations, prior to presentation to the senior leadership, and to provide advice on matters determined by the Chairperson, RETAL. Guidance:

a. This board will be comprised of General Officers, Senior Executives, Command Sergeants Major, and other experts appointed by the Chairperson, RETAL.

b. The leadership of the aforementioned studies and reviews (OPMS 3, NCOES, and SAWS) will be represented on this board.

c. The specific composition of the board, in terms of numbers and Active-Reserve representation, will be determined by the Chairperson. The Chairperson will ensure that key activities charged with leader development are represented on this board (e.g., Training and Doctrine Command, Combined Arms Center, CAL, United States Military Academy, Army War College, Sergeants Major Academy, Force Management School, Civilian Personnel Operations Command Management Agency, Human Resources Command, etc.). (NOTE: SMA will be represented on this body and will monitor activities at his discretion.)

8. ADMINISTRATIVE AND RESOURCE SUPPORT.

a. Officer and civilian members of the Task Force will be provided by ASA(M&RA)/G-1; they will be assigned to ASA(M&RA)/G-1 in an authorized overstrength status and attached to the EOH to accomplish duties in support of the Task Force.

b. Subject to approval by the Administrative Assistant to the Secretary of the Army, the Chairperson, RETAL, is authorized to retain full-time consultants or NSPS Highly Qualified Experts as required.

c. Administrative support (space, clerical, and equipment) will be provided by Director of the Army Staff in close coordination with the Administrative Assistant to the Secretary of the Army.

d. Funds for travel, per diem, and overtime will be provided by the EOH.

BY ORDER OF THE SECRETARY OF THE ARMY:

James L. Campbell

JAMES L. CAMPBELL
Lieutenant General, U.S. Army
Director of the Army Staff

3 Attachments
A – Pentathlete Definition
B – Optimal Developmental Paths
C – Illustrative Terms of Reference

DISTRIBUTION: A

Army Leaders in the 21st Century "The Pentathlete"

Multi-skilled Leader

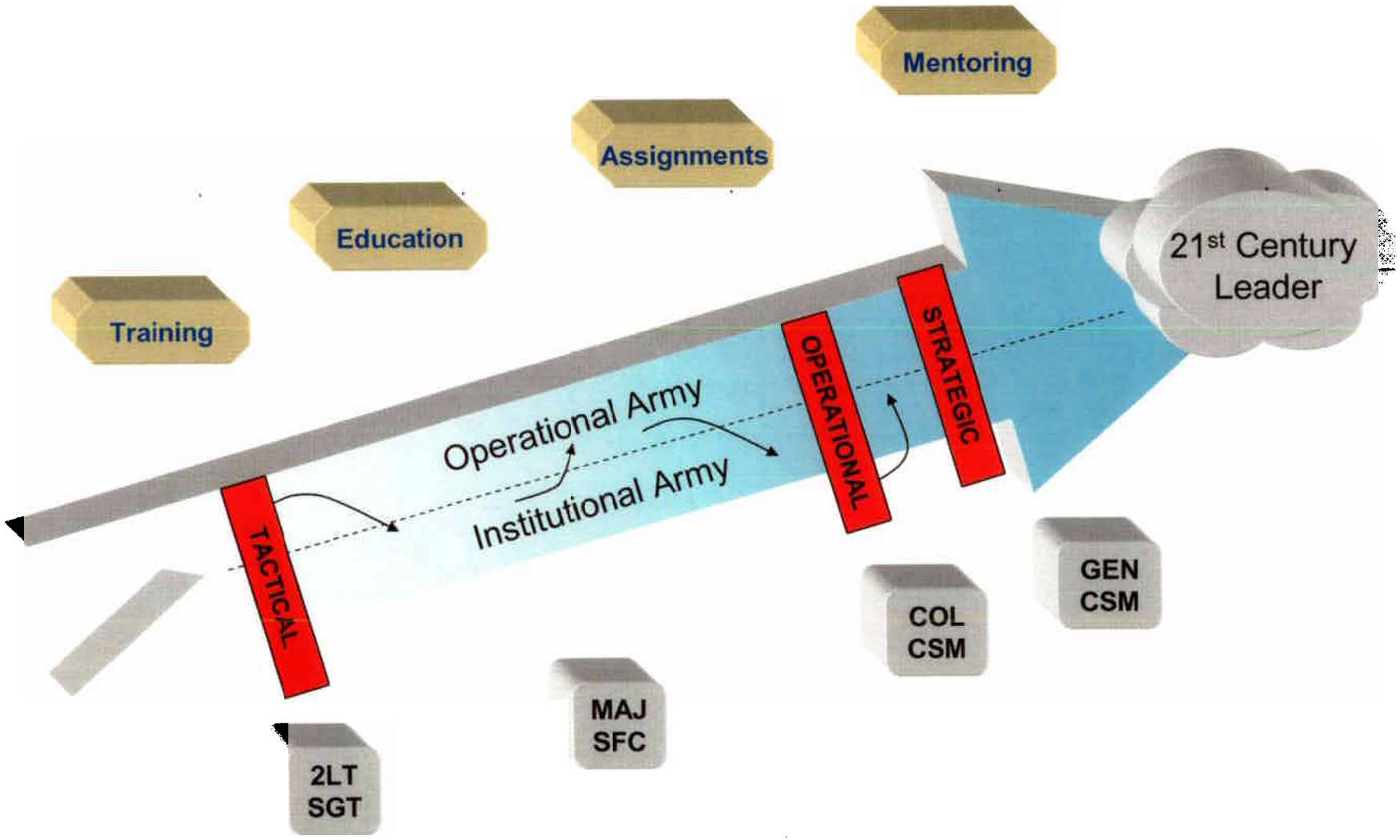
- Strategic & creative **thinker**
- **Builder** of leaders and teams
- Competent full spectrum **warfighter** or accomplished professional who supports the Soldier
- Effective in **managing, leading & changing** large organizations
- Skilled in governance, **statesmanship**, and diplomacy
- Understands **cultural context,** and works effectively across it

Personifies the **Warrior Ethos** in all aspects, from war fighting to statesmanship to enterprise management… It's a way of life

Leader Attributes

- **Decisive,** with integrity and character
- **Confident** and **competent** decision-maker in uncertain situations:
  - **Prudent risk taker**
  - **Innovative**
  - **Adaptive**
- Empathetic
- **Professionally educated** and dedicated to **life-long learning**
- **Effective communicator**

Building 21st Century Leaders



Review of Education, Training and Assignments for Leaders (Military and Civilian)

Illustrative Terms of Reference

- *Which seminal studies have shaped our current policies and programs? What are their most enduring, relevant observations?*

- *What are the major studies and related efforts now underway that focus on military and civilian leadership? What do we mean when we use the term "pentathlete?" How should the charters of our key studies be updated to reflect the newly crafted concept of "the pentathlete?" Assess the degree to which these efforts are, or should be, integrated. How can we achieve maximum payoff from our considerable investment in organizations and institutions – that serve as champions and advocates for leader development across the Army – to accomplish the objectives of this review?*

- *What are our major policies and programs for developing military and civilian leaders? Are these programs focused properly to produce multi-skilled leaders with the skills, values, attributes, versatility, and agility to operate effectively – in both operational and institutional settings – amidst the complexities and challenges inherent to the 21st Century national security environment? Are our policies and programs focused to achieve the right balance of education, training, and assignments to promote confidence, creativity, critical thinking, and team building skills among our leaders (Attachment A)? Are our military and civilian developmental systems complementary and reinforcing of one another – intended to foster common values and attributes across both our military and civilian leaders? Should our system of evaluations and appraisals be updated to reinforce new sets of skills and attributes?*

- *What lessons can we apply – from business, academic, and joint and Army military leaders, both active and retired – to improve the quality of our leadership and our leader development programs across the Army?*

- *How should our policies and programs be updated? How can, and should, our policies be adapted to provide for military assignment patterns that yield a mix of experiences in both operational and institutional settings that will produce senior leaders prepared to excel in either setting?*

- *How do we build "pentathletes" among our officers? How do we ensure that our officer development programs are fully complementary to, and reinforcing of, our NCO and civilian development programs?*

- *How do we build "pentathletes" among our NCOs? How do we ensure that our NCO development programs are fully complementary to, and reinforcing of, our officer and civilian development programs?*

- *How should the National Security Personnel System (NSPS) be implemented in a way that will develop "pentathletes" within the civilian workforce? What changes relative to assignments, mobility, development, education, training, incentives, and appraisals may be required?*

- *What aspects of our developmental policies and programs should we retain? What should we change?*

- *What resources will be required to enact the programs and changes recommended by the RETAL Task Force?*

- *How will coordination with Major Commanders, Department of the Army civilian and military principals, and other Army, Joint, Defense, and U.S. Government agencies (as required) occur? How will senior leaders be able to contribute to the development of the Task Force's findings and recommendations? How will the approval process engage each member of the EOH, as well as the SMA?*