CHARTER OF THE JOINT REQUIREMENTS OVERSIGHT COUNCIL

References: See Enclosure B.

1. **Purpose.** This instruction implements the program established in reference (a) for the Joint Requirements Oversight Council (JROC). It establishes and empowers the JROC as an advisory council to the Chairman of the Joint Chiefs of Staff. This instruction delineates the JROC and Joint Capabilities Board (JCB) compositions and responsibilities and further defines the JROC role in the requirements, capabilities, and acquisition processes.

2. **Cancellation.** CJCSI 5123.01D, 1 August 2007, “Charter of the Joint Requirements Oversight Council,” is canceled.

3. **Applicability.** This instruction applies to the Joint Staff, the Services, combatant commands, Defense agencies, Functional Capabilities Board (FCB) membership (contained in reference b), joint activities, and agencies reporting to the Chairman of the Joint Chiefs of Staff.

4. **Policy.** Reference (a) establishes the JROC. This instruction is the principal document within the JROC structure, to include the CJCSI 3137.01 and CJCSI 3170.01 series, and provides overarching guidance. It is the foundation for all related and supporting JROC efforts within the Joint Capabilities Integration and Development System (JCIDS), including the FCB and the JCB.

5. **Definitions.** See references b, c, and d.

6. **Responsibilities.** As the capstone document within the JROC process, this instruction focuses solely on the responsibilities of the JROC proper, its direct support sub panels, FCBs, JCB, and its direct support staff. It is beyond the scope of this instruction to outline the functions and responsibilities of every organization that interfaces with the JROC process. Other instructions and
documents, such as those noted in Enclosure B, detail responsibilities and procedures for other organizations that support the JROC process.

7. **Summary of Changes.** Changes to this instruction revise the JROC missions, responsibilities, and assign JROC Advisors in accordance with references (e) and (f).

8. **Releasability.** This instruction is approved for public release; distribution is unlimited. DOD components (to include the combatant commands), other Federal agencies, and the public may obtain copies of this instruction through the Internet from the CJCS Directives Home Page--http://www.dtic.mil/cjcs_directives.

9. **Effective Date.** This instruction is effective upon receipt.

For the Chairman of the Joint Chiefs of Staff:

LLOYD J. AUSTIN III
Lieutenant General, USA
Director, Joint Staff

Enclosures:
   A -- Charter of the Joint Requirements Oversight Council
   B -- References
   C -- Glossary
DISTRIBUTION

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| Director, Cost Assessment and Program Evaluation | 2 |
| Assistant Secretary of Defense (Networks & Information Integration) /DOD Chief Information Officer | 2 |
| Under Secretary of Defense (Intelligence) | 2 |
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ENCLOSURE A

CHARTER OF THE JOINT REQUIREMENTS OVERSIGHT COUNCIL

1. Introduction. The Defense Reorganization Act of 1986 established the Chairman of the Joint Chiefs of Staff’s statutory responsibility to advise the Secretary of Defense on requirements, programs, and budgets. In fulfilling this responsibility, the Chairman of the Joint Chiefs of Staff (hereafter referred to as “the Chairman”) will:

a. Assess military requirements for defense acquisition programs.

b. Advise the Secretary of Defense on Military Departments’ and combatant commands’ capabilities.

c. Provide program advice to the Secretary of Defense for the Joint Programming Guidance via the Chairman’s Program Recommendations.

d. Provide advice to the Secretary of Defense on conformance of the Services’ program objective memorandums to the priorities established in the strategic plans and by the combatant command’s priority capabilities via the Chairman’s Program Assessment (CPA).

e. Provide alternative program recommendations and budget proposals via the CPA.

2. The Joint Requirements Oversight Council (JROC)

a. JROC Mission. Reference (a), directed the Secretary of Defense to establish the JROC. In addition to other matters assigned to it by the President or Secretary of Defense, the JROC shall:

(1) Assist the Chairman in identifying, assessing, and approving joint military requirements (including existing systems and equipment) to meet the national military strategy; and in identifying the core mission area associated with each such requirement.

(2) Assist the Chairman in ensuring the consideration of trade-offs among cost, schedule, and performance objectives for joint military requirements in consultation with the advisors specified in section c.

(3) Assist the Chairman in establishing and assigning priority levels for joint military requirements.

(4) Assist the Chairman, in consultation with the Under Secretary of Defense (Comptroller) (USD(C)), the Under Secretary of Defense for Acquisition,
Technology and Logistics (USD(AT&L)), and the Director of Cost Assessment and Performance Evaluation (CAPE), in reviewing the estimated level of resources required in the fulfillment of each joint military requirement and in ensuring that such resource level is consistent with the level of priority assigned to such requirement.

(5) Assist acquisition officials in identifying alternatives to any acquisition program that meet joint military requirements for the purposes of section 2366a(a)(4), section 2366b(b), and section 2433(e)(2) of title 10, USC.

(6) Assist the Chairman, in consultation with the combatant commands and the USD(AT&L), in establishing an objective for the overall period of time within which an initial operational capability should be delivered to meet each joint military requirement.

b. JROC Membership. The Chairman is the chairman of the JROC. The functions of the JROC Chairman are delegated to the Vice Chairman of the Joint Chiefs of Staff. Other members of the JROC are officers in the grade of general or admiral from the Army, Navy, Air Force, and Marine Corps. Service representatives are recommended by their military department secretary and approved by the Chairman after consultation with the Secretary of Defense.

c. JROC Advisors.

(1) The USD (AT&L), the USD(C), and the Director, CAPE shall serve as advisors to the JROC on matters within their authority and expertise.

(2) The council shall seek and consider input from the commanders of the combatant commands in carrying out its mission under paragraphs (1) and (2) of subsection (a) and in conducting periodic reviews in accordance with the requirements of subsection (e).

d. Advisory Support to the JROC

(1) Each of the combatant commands has a standing invitation to attend JROC sessions in an advisory role to the JROC Chairman on joint issues that address present and/or future joint warfighting capabilities.

(2) Any of the FCB participating organizations have a standing invitation to attend JROC-related meetings in an advisory role to the JROC Chairman on joint issues that address present and/or future joint warfighting capabilities to include:

(a) OSD/Milestone Decision Authorities (MDAs)
1. Under Secretary of Defense for Acquisition, Technology, and Logistics *MDA for Major Defense Acquisition Programs (MDAPs)

2. Under Secretary of Defense for Policy (USD(P))

3. Under Secretary of Defense (Comptroller)

4. Under Secretary of Defense for Personnel and Readiness

5. Under Secretary of Defense for Intelligence (USD(I))

6. Under Secretary of the Air Force for Space Systems (USecAF Space) *MDA for Space Programs if delegated by the USD(AT&L)

7. Assistant Secretary of Defense (Networks and Information Integration)/DOD Chief Information Officer (ASD(NII)/DOD CIO) *MDA for Major Automated Information Systems (MAIS), if delegated by the USD(AT&L), and the responsibilities of the DOD CIO

8. Director, Cost Assessment, and Performance Evaluation

(b) Defense Agencies

1. National Geospatial-Intelligence Agency

2. Defense Information Systems Agency

3. National Security Agency

4. National Reconnaissance Office

5. Missile Defense Agency

6. Defense Threat Reduction Agency

7. Defense Intelligence Agency

8. Defense Security Cooperation Agency

9. Defense Logistics Agency

10. Defense Advanced Research Projects Agency

11. Defense Contract Management Agency

12. Other Defense agencies
(3) Each of the following interagency organizations has a standing invitation to attend and provide senior-level advisory participation at JROC-related meetings on topics dealing in areas where their organizations have expertise:

(a) National Security Council
(b) Office of the Director of National Intelligence
(c) Office of Management and Budget
(d) Central Intelligence Agency
(e) Department of State
(f) Department of Homeland Security
(g) Other interagencies or departments

(4) The Joint Staff/J-8, being responsible for Doctrine, Organization, Training, Materiel, Leadership and Education, Personnel, and Facilities (DOTMLPF) Change Recommendations (DCR), will serve the JROC in an advisory role to support staffing and action on JROC DCR decisions.

e. JROC Responsibilities. Members of the JROC are responsible to the Chairman for performing the missions and functions set forth in this charter. The JROC will:

(1) Assist the Chairman in coordinating, among combatant commands, Service force providers, and other DOD components the identification and assessment of joint military requirements and priorities for current and future military capabilities, forces, programs, and resources consistent with the National Military Strategy (NMS), the National Defense Strategy (NDS), National Security Strategy (NSS), Guidance for the Development of the Force (GDF), Guidance for the Employment of the Force (GEF), and Quadrennial Defense Review (QDR), and the total resource levels projected by the Secretary of Defense in the fiscal guidance.

(2) Assist the Chairman in providing guidance, oversight, and validation on complex capabilities integration.
(3) Assist the Chairman to develop and/or validate operational and mission area integrated architectures, operational concepts required by the NMS, facilitating the advancement of joint warfighting capabilities and participating in the collaborative development of joint integrated architectures as prescribed by reference (g) and further described in reference (h).

(4) Assist the Chairman in preparation of CJCS Chairman’s Program Review and Chairman’s Program Assessment.

(5) Assist the Vice Chairman of the Joint Chiefs of Staff in his role as a Principal Member of the Defense Acquisition Board (DAB), by reviewing and approving military need and joint interoperability capabilities for potential Acquisition Category (ACAT) I programs, JROC interest programs, and Major Automated Information Systems (MAIS) as may be directed by the Secretary of Defense or Chairman and by considering cost, schedule and performance, and nonmateriel alternatives for any acquisition program identified to meet military needs (i.e., alternatives involving changes in policy, doctrine, organization, training, leadership and education, personnel, and facilities).

(6) Assist the Chairman in considering alternatives to any acquisition program identified to meet joint military requirements by evaluating performance, costs, and schedule of the acquisition program and identified alternatives.

(7) At its discretion, review any capabilities documents and acquisition programs to resolve interoperability or contentious issues.

(8) For programs designated for JROC review, consider, review, and where appropriate, certify the nonmateriel joint DOTMLPF implications of materiel solutions for future joint warfighting capabilities and deficiencies.

(9) Assess and prioritize combatant command, Service, and Defense agency warfighting requirements and deficiencies and conduct other joint assessments of DOD programs, infrastructure, support functions, manpower, and quality-of-life matters as may be directed by the Secretary of Defense or the Chairman.

(10) Perform other duties as assigned to support CJCS advice to the President, National Security Council, Secretary of Defense, Congress, OSD, or others on matters concerning joint military requirements and priorities; science, technology, and acquisition; programs, budgets, and resources; balance warfighting and support needs; as well as current readiness needs and investments in future capabilities.

(11) Assist the Chairman in drafting the annual strategic guidance to the combatant commands, Services, and Joint Staff.
(12) Review acquisition programs and assessments at the request of the Secretary of Defense, Deputy Secretary of Defense, USD(AT&L), USD(P), ASD (NII)/DOD CIO, USD(I), and USecAF Space.

(13) Review, assess, and validate Joint Experimentation Plans.

(14) Assist the Chairman in considering alternative program recommendations in programs experiencing cost growth. The JROC will review and provide an assessment and evaluation of JROC interest programs that experience a 10 percent increase to the approved acquisition program baseline (Program Acquisition Unit Cost/Acquisition Procurement Unit Cost) and/or a 25 percent cost growth relative to their original program baseline to avert Nunn-McCurdy breaches.

(15) Conduct periodic reviews of joint military requirements within a core mission area of the Department of Defense. In any such review of a core mission area, the officer or official assigned to lead the review shall have a deputy from a different military department.

f. JROC Functions

(1) Determine and oversee the processes and methods to be used in identifying, developing, assessing, validating, and prioritizing joint military requirements.

(2) Determine the joint military requirements necessary to achieve joint force interdependence and interoperability within combined and/or coalition forces and with nongovernmental organizations and non-DOD organizations both from the United States and other countries.

(3) Review, validate, and approve joint military requirements and validate those requirements that cannot be satisfied by nonmateriel means.

(4) Review and approve joint capabilities assessment methodologies.

(5) Establish and oversee the procedures by which joint military requirements are validated.

(6) Oversee the process for certifying that capability documents incorporate the interoperability and net ready key performance parameters (KPPs) into applicable capability development documents (CDDs), capability production documents (CPDs), and DCRs as defined in reference (i).
(7) Direct the review of all initial capabilities documents (ICDs), CDDs, CPDs, and Joint DCRs for the purpose of identifying those with joint warfighting impact and assign a joint potential designator (JPD) of JROC interest, JCB interest, joint integration, joint information, or independent based upon that review.

(8) Validate key performance parameters (KPPs) in acquisition program baselines prior to DAB reviews of MDAPs (including, unless otherwise directed by the Secretary of Defense, highly sensitive classified programs).

(9) Oversee the process for certifying intelligence supportability and threat validation as defined in reference (j).

(10) Identify and/or review actual or potential system attributes of ICDs, CDDs, and CPDs that are potential cost drivers to a program.

(11) Review materiel solution analyses and technology development efforts. Provide recommendation(s) on alternatives and cost performance trades to USD(AT&L) prior to program initiation review.

(12) Participate in program reviews between formal acquisition milestone decisions, to ensure system performance meets original mission needs and to address synchronization of evolving capabilities with and among current acquisition programs.

(13) Ensure Service-proposed capabilities, forces, programs, and budgets are linked to the NMS, NDS, GDF, GEF, joint operations concepts, and integrated architectures (when or as developed) and combatant command-identified capabilities needed.

(14) Oversee broad mission area assessments. Review and approve plans and recommendations for correcting joint warfighting deficiencies/overages of the combatant commands while ensuring interoperability, reducing parallel and duplicate development efforts, and promoting economies of scale.

(15) Conduct risk assessments and establish joint priorities within key warfighting and support areas.

(16) Assist the Vice Chairman in formulating positions to be taken in discussion or correspondence with appropriate DOD components and/or the combatant commands on issues before the DAB.

(17) Establish and oversee the supporting structures and processes necessary to accomplish the JROC’s assigned missions and responsibilities, to include:
(a) The Gatekeeper process

(b) FCBs

(c) JCBs

(18) Provide oversight of the JCIDS process.

(19) Meet periodically with combatant commands to ensure current and future warfighting deficiencies and capabilities are identified, well defined, and given emphasis in the establishment of joint capabilities and programmatic priorities.

(20) Provide guidance to ensure development and validation of the operational view of integrated operational concepts and/or views of integrated architectures and related products (e.g., joint operations concept), capabilities integration and operational concepts in support of the NMS and realization of joint warfighting capabilities.

(21) Maintain a central and integrated database and knowledge management system for:

(a) Capabilities integration and documentation, including ICDs, CDDs, CPDs, and DCRs.

(b) Decisions on the operational view of integrated operational concepts and/or view of integrated architectures and related products.

(c) Operational concept decisions.

(d) Joint DOTMLPF review issues.

(e) Any other JROC validation or support decisions.

(22) Review and validate all FCB efforts, including:

(a) Approval of strategic assessment topics.

(b) Approval of individual FCB assessment topics.

(c) Approval of all other FCB assessment efforts, to include Joint Quarterly Readiness Review, QDR support, and capability portfolio management recommendations.
(d) Approval of the resources identified and used to support JROC/JCB/FCB efforts.

(e) Approval of joint functional concepts.

(23) Nominate topics for JROC consideration and advise the JROC Chairman on issues requiring council review.

(24) Ensure the DOTMLPF recommendations resulting from joint concept development and experimentation are integrated into JROC deliberations on identifying, developing, validating, and prioritizing joint military requirements.

(25) Ensure the Joint Experiment Plan results are integrated into JROC deliberations on identifying, developing, validating, and prioritizing joint military requirements. During this experimentation, combatant commands should be prepared to leverage those promising joint operational capabilities identified by USD(AT&L), link them to applicable DCRs and joint concept technology demonstrations (JCTDs) and provide recommendations.

(26) Review JCTD proposals prioritized by vote of the combatant commanders and Services to validate the associated mission needs prior to JCTD approval by USD(AT&L).

(27) Approve development of Joint Integrating Concepts (JIC).

(28) Review and integrate appropriate SWarF findings and recommendations into ongoing resource, requirement, and capability analysis, development, prioritization, and validation efforts.

3. The Joint Capabilities Board

a. JCB Membership. The JCB is comprised of general or flag officers from each of the Services, designated by their respective JROC permanent member. The JROC Secretary chairs the JCB. The Chief, Joint Capabilities Division, Joint Staff/J-8, is designated as the JCB Secretary.

b. JCB Functions. As the JROC supports the Chairman in carrying out CJCS responsibilities, the JCB functions to assist the JROC in carrying out its duties and responsibilities. Functions of the JCB are:

(1) Assist the JROC in overseeing the JCIDS, to include mission-need determination, review and validation and/or approval of ICDs, CDDs, CPDs, and Joint DCRs and operational views of integrated operations concepts, architectures, and related products.
(2) Review FCB insights, findings, and recommendations as well as provide appropriate guidance, suggestions, and direction prior to final JROC review.

(3) Nominate topics for JROC consideration and advise the JROC Chairman on issues requiring council review.

4. The Gatekeeper (J-8 Deputy Director for Requirements, (DDR))

   a. The Gatekeeper process is the initial review of submitted ICDs, CDDs, CPDs, and DCRs. The Gatekeeper determines the Joint Potential Designator to assign and determines which FCB should lead and support.

   b. The Knowledge Management / Decision Support (KM/DS) tool will be used throughout the entire JCIDS process from initial submission of the document, staffing, JCB review, to JROC action and follow-up if needed.

5. The Functional Capabilities Board

   a. The FCB, in accordance with CJCSI 3137.01, is responsible for the organization, analysis, and prioritization of joint warfighting capability needs proposals within assigned functional areas. The FCB will work to ensure the joint force is best served by the capabilities proposed through JCIDS and that those capabilities consider all DOTMLPF considerations.

   b. The FCB is an advisory body to the JCB and JROC for JCIDS initiatives assigned with JPDs of “JROC interest” and “JCB interest.” JCIDS initiatives with a JPD of “joint integration” will require intelligence certification and/or threat validation, munitions certification or interoperability certification as appropriate before returning to the sponsor for validation and approval. JCIDS initiatives with the JPD of “Joint Information” or “Independent” will be routed to the sponsor for validation and approval.

   c. The FCB Chairman has the flexibility necessary to implement the intent of this instruction for those cases not explicitly covered. In cases where there is disagreement within the FCB that cannot be resolved, the FCB Chairman will forward the issue to the JCB for decision. If necessary, the FCB Chairman may invite appropriate MDA representatives to co-chair the FCB.

   d. Each FCB evaluates its functional area(s) and JCIDS proposals that affect its functional area(s). Functions of the FCB are:

      (1) Assist the JROC and JCB in overseeing capabilities development to include review and validation and/or approval of ICDs, CDDs, CPDs, DCRs, and operational views of integrated operational concepts and/or architectures and related products.
(2) Coordinate and integrate participation to ensure that the supporting analysis adequately leverages the expertise of the DOD components -- in particular, the Services, combatant commands, agencies, and DOD laboratories -- and science and technology community initiatives, experimentation initiatives, non-DOD agencies, and industry to identify promising materiel and nonmateriel approaches.

(3) Develop FCB insights, findings, and recommendations on the operational views of integrated operational concepts and/or architectures and related products and provide recommendations to the JCB.

(4) Nominate topics for JCB and/or JROC consideration and advise the JCB and JROC Chairman on issues requiring JROC review.

(5) Provide USD(AT&L) priority joint warfighting capabilities for each of the joint functional concepts as established through the JCIDS process. These priority joint warfighting capabilities will serve to inform the science and technology community and focus the technology development efforts specified in the Joint Warfighting Science and Technology Plan.

(6) Coordinate with capability portfolio managers on the conduct of portfolio-wide planning, management, and assessment of inputs to and outputs from the capability portfolio.

(7) Ensure all read ahead briefs are posted 72 hours prior on KM/DS for widest dissemination of information as possible. Forward all FCB minutes to the JROC Secretariat and post to KM/DS. Prepare and present context slides for FCB topics for all pre-briefs, as well as JCB and JROC briefs.

(8) Ensure FCBs provide briefings and summaries to all other FCBs within two business days of conclusion of subject meetings.

6. **JROC Chairman.** The JROC Chairman performs the following functions:

   a. Calls the JROC meetings.

   b. Develops the agenda for JROC meetings, organizes JROC work, and ensures prompt prosecution of JROC business.

   c. Oversees the JCIDS process to ensure proper focus in accordance with JROC responsibilities.

   d. Acts on behalf of the JROC in maintaining liaison with DOD components.
e. Serves as a Principal Member of the DAB.

f. Schedules briefings by DOD components on issues that may require JROC resolution or recommendations.

g. Records, with the support of the JROC Secretariat, decisions, and recommendations of the JROC through JROC memorandums.

h. Responsible for all internal and external reports.

7. JROC Secretary. The JROC Chairman appoints the Joint Staff Director for Force Structure, Resources, and Assessment as the JROC Secretary. The functions of the Secretary are to:

a. Function as the chairman of the JCB.

b. Support the JROC Chairman and the JROC in executing JROC responsibilities.

c. Distribute JROC decisions.

d. Develop and establish JROC administrative procedures.

e. Provide necessary continuity and a Joint Staff point of contact (POC) for the JROC.

f. Appoint a JROC recorder to document JROC actions and maintain JROC historical records.

g. Coordinate oversight of the JCIDS process and coordinate other issues requiring JROC review.

h. Conduct JROC pre-briefs to ensure format, content, and presentation are appropriate.

i. Coordinate the actions of the Joint Staff in their support of the JROC Chairman.

j. Maintain liaison with the combatant commands.

k. Maintain a central and integrated database and knowledge management system directly supporting the JROC process.

l. Perform all other JROC or JCIDS process oversight, facilitation, and integration functions as directed by the JROC.
8. **JROC Capabilities.** Strategic assessments represent the principal mechanism by which the JROC focuses FCB efforts on significant issues with the greatest potential impact on future joint warfighting. These assessments will enable the JROC to make definitive decisions and recommendations on future operational concepts and architectures and individual or family of system capabilities. Based on these published decisions and standards, the JROC will validate the compliance of future capabilities.

   a. Strategic assessments represent the JROC’s highest priority efforts and will receive the highest priority for JROC resources. These assessments fall into three general categories: operational concepts and architectures, future system characteristics, and capabilities and bridge to future/legacy system requirements. These assessments can provide an opportunity for the Chairman to influence joint experimentation efforts and facilitate their eventual impact on DOD decision-making processes.

   b. The JROC will solicit strategic topics from the combatant commands, Services, Joint Staff, OSD, and combat support agencies based on current CJCS strategic guidance. In addition, the normal timeline links development of assessment efforts with FCB resource allocation. Because strategic topics represent a considerable commitment of JROC resources, the JROC will solicit strategic topics based on FCB availability, not necessarily on an annual basis.

9. **JROC Communications**

   a. JROC communications are separate, unique and do not follow normal Joint Staff or Service channels. The JROC process includes the JCIDS process; accordingly, JCIDS communications will use the procedures outlined below. Direct communications are necessary to facilitate and expedite JROC information flow. Communications from the JROC to the combatant commands and Services are direct. Combatant command or Service principals will identify a combatant command or Service POC who has direct access to that principal to assist and facilitate JROC matters. Priority communications will be direct from the JROC Chairman or the JROC Secretary to the combatant command or Service principal and return. Likewise, communications between the JROC and the MDAs: USD(AT&L), ASD(NII)/DOD CIO, and USecAF Space are direct. The communications channels are via memorandum from the JROC Chairman to the MDAs, USD(AT&L), OASD(NII)/DOD CIO, and USecAF Space and return, or from the JROC Secretary to the DAB Executive Secretary and return. The Vice Chairman of the Joint Chiefs of Staff is the Principal JROC representative to the Deputy’s Advisory Working Group and as the Principal, can present JROC positions.
b. JROC Information Availability and Releasability

(1) The JROC Secretariat is the approval authority for release of all official JROC information and documents. JROC pre-decisional documents and briefings are not available for release without coordination of the JROC Secretariat and Joint Staff/J-8, Joint Capabilities Division.

(2) The JROC Secretariat will maintain all minutes and memorandums associated with the JROC process. Pre-decisional minutes and memorandums will be accessible to the Services and the Joint Staff. Pre-decisional memorandums will be accessible to the combatant commands as appropriate. The OSD, combatant commands, and other DOD agencies will be able to access approved materials through the KM/DS web-based application.

(3) When the Secretary of Defense approves a recommendation of the Chairman, oversight information (information and materials comprising analysis and justification that are prepared to support a recommendation that is made to, and approved by, the Secretary of Defense) with respect to the recommendation produced as a result of JROC activities will be made available in a timely fashion to congressional defense committees.

(4) Other JROC information may be released to Congress and other non-DOD entities only after complete case-by-case review and coordination with the JROC Secretariat, JROC, Services, and applicable Joint Staff offices (e.g., Legal Counsel, Public Affairs, and Legislative Assistant), as appropriate.

REFERENCES

a. Title 10, USC, section 181, “Joint Requirements Oversight Council”

b. CJCSI 3170.01 series, “Joint Capabilities Integration and Development System”

c. CJCSI 3137.01 series, “The Functional Capabilities Board Process”

d. CJCSI 3180.01 series, “Joint Requirements Oversight Council (JROC) Programmatic Process for Joint Experimentation and Joint Resource Change Recommendations”


f. Weapons Systems Acquisition Reform Act of 2009

g. DODD 5000.01, 12 May 2003 “The Defense Acquisition System”

h. DODI 5000.02, 8 December 2008, “Operation of the Defense Acquisition System”

i. CJCSI 6212.01 series, “Interoperability and Supportability of Information Technology Systems and National Security Systems”

j. CJCSI 3312.01 series, “Joint Military Intelligence Requirements Certifications”

k. JROCM 105-08, 27 May 2008, “JROC Administrative Procedures and References”

GLOSSARY

PART I – ACRONYMS

ACAT        acquisition category
AoA         analysis of alternatives
APB         acquisition program baseline
ASD(NII)/CIO Assistant Secretary of Defense (Networks and Information Integration)/Chief Information Officer
AT&L        acquisition, technology, and logistics

CAD         Capabilities and Acquisition Division (Joint Staff/J-8)
CAIG        Cost Analysis Improvement Group
CBA         capabilities-based assessment
CBRN        chemical, biological, radiological, and nuclear
CDD         capability development document
CIO         Chief Information Officer
CJCS        Chairman of the Joint Chiefs of Staff
CJCSI       Chairman of the Joint Chiefs of Staff Instruction
CJCSM       Chairman of the Joint Chiefs of Staff Manual
CONOPS      concept of operations
CONPLAN     concept plan
COTS        commercial off the shelf
CPD         capability production document
CSA         combat support agency

DCR         doctrine, organization, training, materiel, leadership and education, personnel, and facilities (DOTMLPF) change recommendation

DDFP        Deputy Director for Force Protection
DDR         Deputy Director for Requirements
DIA         Defense Intelligence Agency
DISA        Defense Information Systems Agency
DJ-8        Joint Staff Director, J-8 (Force Structure, Resources, and Assessment Directorate)
DOD         Department of Defense
DODD        Department of Defense directive
DODI        Department of Defense instruction
DOT&E       Director, Operational Test, and Evaluation
DOTMLPF     doctrine, organization, training, materiel, leadership and education, personnel, and facilities

EA          executive agent
<table>
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<tr>
<th>Abbreviation</th>
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<tr>
<td>FCB</td>
<td>Functional Capabilities Board</td>
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<tr>
<td>FOC</td>
<td>full operational capability</td>
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<td>FoS</td>
<td>family of systems</td>
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<td>G/FO</td>
<td>general/flag officer</td>
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<td>IA</td>
<td>information assurance</td>
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<td>ICD</td>
<td>initial capabilities document</td>
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<td>IOC</td>
<td>initial operational capability</td>
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<td>IPL</td>
<td>Integrated Priority List</td>
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<tr>
<td>ISR</td>
<td>intelligence, surveillance, and reconnaissance</td>
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<td>information technology</td>
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<td>Force Structure, Resources, and Assessment Directorate, Joint Staff</td>
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<td>JCA</td>
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<td>JOpsC</td>
<td>Joint Operations Concepts</td>
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<tr>
<td>JPD</td>
<td>joint potential designator</td>
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<td>JROC</td>
<td>Joint Requirements Oversight Council</td>
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<tr>
<td>JROCM</td>
<td>Joint Requirements Oversight Council memorandum</td>
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<tr>
<td>JUON</td>
<td>joint urgent operational need</td>
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<tr>
<td>KM/DS</td>
<td>Knowledge Management/Decision Support</td>
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<tr>
<td>KPP</td>
<td>key performance parameter</td>
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<tr>
<td>KSA</td>
<td>key system attribute</td>
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<tr>
<td>MAIS</td>
<td>Major Automated Information System</td>
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<tr>
<td>MDA</td>
<td>milestone decision authority</td>
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<td>MDAP</td>
<td>major defense acquisition program</td>
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<td>MDD</td>
<td>materiel development decision</td>
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<td>MSA</td>
<td>materiel solution analysis</td>
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<tr>
<td>NDS</td>
<td>National Defense Strategy</td>
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<tr>
<td>NGA</td>
<td>National Geospatial-Intelligence Agency</td>
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<tr>
<td>NGB</td>
<td>National Guard Bureau</td>
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<td>NMS</td>
<td>National Military Strategy</td>
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<td>NR-KPP</td>
<td>net-ready key performance parameter</td>
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<td>NRO</td>
<td>National Reconnaissance Office</td>
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<td>NSA</td>
<td>National Security Agency</td>
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<tr>
<td>Abbreviation</td>
<td>Description</td>
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<tr>
<td>NSS</td>
<td>National Security Strategy</td>
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<tr>
<td>NSS</td>
<td>national security system</td>
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<tr>
<td>O&amp;M</td>
<td>operations and maintenance</td>
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<td>O&amp;S</td>
<td>operations and support</td>
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<tr>
<td>OCA&amp;PE</td>
<td>Office of Cost Assessment and Program Evaluation</td>
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<tr>
<td>OPLAN</td>
<td>operation plan</td>
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<tr>
<td>OSD</td>
<td>Office of the Secretary of Defense</td>
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<tr>
<td>OUSD(AT&amp;L)</td>
<td>Office of the Under Secretary of Defense for Acquisition, Technology, and Logistics</td>
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<tr>
<td>PM</td>
<td>program manager</td>
</tr>
<tr>
<td>RDT&amp;E</td>
<td>research, development, test, and evaluation</td>
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<tr>
<td>SoS</td>
<td>system of systems</td>
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<tr>
<td>SWarF</td>
<td>Senior Warfighters’ Forum</td>
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<tr>
<td>UCP</td>
<td>Unified Command Plan</td>
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<tr>
<td>UJTL</td>
<td>Universal Joint Task List</td>
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<tr>
<td>USecAF</td>
<td>Under Secretary of the Air Force</td>
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<tr>
<td>USD(AT&amp;L)</td>
<td>Under Secretary of Defense (Acquisition, Technology, and Logistics)</td>
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<td>USD(C)</td>
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<td>USD(P&amp;R)</td>
<td>Under Secretary of Defense (Personnel &amp; Readiness)</td>
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<tr>
<td>USJFCOM</td>
<td>United States Joint Forces Command</td>
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PART II — DEFINITIONS

acquisition category (ACAT) - Categories established to facilitate decentralized decision-making and execution and compliance with statutorily imposed requirements. The ACAT determines the level of review, validation authority, and applicable procedures. Reference b provides the specific definition for each ACAT.

acquisition program baseline (APB) - Each program’s APB is developed and updated by the program manager and will govern the activity by prescribing the cost, schedule, and performance constraints in the phase succeeding the milestone for which it was developed. The APB captures the user capability needs, including the key performance parameters, which are copied verbatim from the capability development document.

analysis of alternatives (AoA) - The evaluation of the performance, operational effectiveness, operational suitability, and estimated costs of alternative systems to meet a mission capability. The AoA assesses the advantages and disadvantages of alternatives being considered to satisfy capabilities, including the sensitivity of each alternative to possible changes in key assumptions or variables. The AoA is one of the key inputs to defining the system capabilities in the capability development document.

approval - The formal or official sanction of the identified capability described in the capability documentation. Approval also certifies that the documentation has been subject to the JCIDS process.

architecture - The structure of components, their relationships, and the principles and guidelines governing their design and evolution over time.

attribute - A quantitative or qualitative characteristic of an element or its actions.

capabilities-based assessment (CBA) – The CBA is the Joint Capabilities Integration and Development System analysis process. It answers several key questions for the validation authority prior to their approval: define the mission; identify capabilities required; determine the attributes/standards of the capabilities; identify gaps; assess operational risk associated with the gaps; prioritize the gaps; identify and assess potential non-materiel solutions; provide recommendations for addressing the gaps.

capability - The ability to achieve a desired effect under specified standards and conditions through combinations of means and ways across the doctrine, organization, training, materiel, leadership and education, personnel, and facilities (DOTMLPF) to perform a set of tasks to execute a specified course of action. It is defined by an operational user and expressed in broad operational
terms in the format of an initial capabilities document or a joint DOTMLPF change recommendation. In the case of materiel proposals/documents, the definition will progressively evolve to DOTMLPF performance attributes identified in the capability development document and the capability production document.

capability development document (CDD) - A document that captures the information necessary to develop a proposed program(s), normally using an evolutionary acquisition strategy. The CDD outlines an affordable increment of militarily useful, logistically supportable, and technically mature capability. The CDD may define multiple increments if there is sufficient definition of the performance attributes (key performance parameters, key system attributes, and other attributes) to allow approval of multiple increments.

capability gaps - The inability to achieve a desired effect under specified standards and conditions through combinations of means and ways to perform a set of tasks. The gap may be the result of no existing capability, lack of proficiency or sufficiency in existing capability, or the need to replace an existing capability.

capability need - A capability identified through the CBA, required being able to perform a task within specified conditions to a required level of performance.

capability production document (CPD) - A document that addresses the production elements specific to a single increment of an acquisition program. The CPD defines an increment of militarily useful, logistically supportable, and technically mature capability that is ready for a production decision. The CPD defines a single increment of the performance attributes (key performance parameters, key system attributes, and other attributes) to support a Milestone C decision.

certification - A statement of adequacy provided by a responsible agency for a specific area of concern in support of the validation process.

concept of operations (CONOPS) - A verbal or graphic statement, in broad outline, of a commander’s assumptions or intent in regard to an operation or series of operations. The CONOPS frequently is embodied in campaign plans and operation plans; in the latter case, particularly when the plans cover a series of connected operations to be carried out simultaneously or in succession. The concept is designed to give an overall picture of the operation. It is included primarily for additional clarity of purpose. Also called a commander’s concept.

core mission area – a core mission area of the Department of Defense identified under the most recent quadrennial roles and missions review pursuant to section 118b of reference (a).
**critical considerations** - The seven domains of DOTMLPF: joint doctrine, agile organizations, joint training, enhanced materiel, innovative leadership and education, and high quality people; plus the additional element of facilities and the policies that affect them.

**DOD 5000 Series** - DOD 5000 series refers collectively to DODD 5000.1 and DODI 5000.2.

**DOD component** - The DOD components consist of the Office of the Secretary of Defense, the Military Departments, the Chairman of the Joint Chiefs of Staff, the combatant commands, the Office of the Inspector General of the DOD, the Defense agencies, DOD field activities, and all other organizational entities within the DOD.

**family of systems (FoS)** - A set of systems that provide similar capabilities through different approaches to achieve similar or complementary effects. For instance, the warfighter may need the capability to track moving targets. The FoS that provides this capability could include unmanned or manned aerial vehicles with appropriate sensors, a space-based sensor platform, or a special operations capability. Each can provide the ability to track moving targets but with differing characteristics of persistence, accuracy, timeliness, etc.

**Functional Capabilities Board (FCB)** - A permanently established body that is responsible for the organization, analysis, and prioritization of joint warfighting capabilities within an assigned functional area.

**Gatekeeper** - That individual who makes the initial joint potential designation of Joint Capabilities Integration and Development System (JCIDS) documents. This individual will also make a determination of the lead and supporting Functional Capabilities Boards (FCBs) for capability documents. The Gatekeeper is supported in these functions by the FCB working group leads and the Joint Staff/J-6. The Joint Staff Deputy Director for Requirements, J-8, serves as the Gatekeeper.

**increment** - A militarily useful and supportable operational capability that can be effectively developed, produced or acquired, deployed, and sustained. Each increment of capability will have its own set of threshold and objective values set by the user. Spiral development is an instance of an incremental development strategy where the end state is unknown. Technology is developed to a desired maturity and injected into the delivery of an increment of capability.

**information system** - Any equipment, or interconnected system or subsystem of equipment, that is used in the automatic acquisition, storage, manipulation, management, movement, control, display, switching, interchange, transmission, or reception of data or information and includes computers and computer networks, ancillary equipment, software, firmware and related
procedures, services (including support services), and related resources. Notwithstanding the above, the term information system does not include any equipment that is acquired by a federal contractor incidental to a federal contract. Information system is used synonymously with information technology (to include National Security Systems).

**initial capabilities document (ICD)** - Summarizes the CBA and recommends materiel or non-materiel approaches or approaches that are a combination of materiel and non-materiel to satisfy specific capability gaps. It defines the capability gap(s) in terms of the functional area, the relevant range of military operations, desired effects, time, and DOTMLPF and policy implications and constraints. The ICD summarizes the results of the DOTMLPF analysis and the DOTMLPF approaches (materiel and non-materiel) that may deliver the required capability. The outcome of an ICD could be one or more joint DOTMLPF change recommendations or capability development documents.

**interoperability** - The ability of U.S. and coalition partner systems, units, or forces to provide data, information, materiel, and services to and accept the same from other systems, units, or forces, and to use the data, information, materiel, and services so exchanged to enable them to operate effectively together. Information Technology and National Security Systems interoperability includes both the technical exchange of information and the end-to-end operational effectiveness of that exchanged information as required for mission accomplishment.

**joint capability area (JCA)** - Collections of like DOD capabilities functionally grouped to support capability analysis, strategy development, investment decision making, capability portfolio management, and capabilities-based force development and operational planning.

**Joint Capabilities Board (JCB)** - The JCB functions to assist the Joint Requirements Oversight Council (JROC) in carrying out its duties and responsibilities. The JCB reviews and, if appropriate, endorses all Joint Capabilities Integration and Development System (JCIDS) and joint DOTMLPF change recommendation documents prior to their submission to the JROC. The JCB is chaired by the Joint Staff Director of Force Structure, Resources, and Assessment (J-8). It is comprised of general and flag officer representatives of the Services.

**Joint Capability Technology Demonstration (JCTD)** - A demonstration of the military utility of a significant new technology and an assessment to establish clearly operational utility and system integrity.
joint doctrine, organization, training, materiel, leadership and education, personnel and facilities change recommendation – A recommendation for changes to existing joint resources when such changes are not associated with a new defense acquisition program.

a. joint doctrine – Fundamental principles that guide the employment of US military forces in coordinated action toward a common objective. Though neither policy nor strategy, joint doctrine serves to make US policy and strategy effective in the application of US military power. Joint doctrine is based on extant capabilities. Joint doctrine is authoritative guidance and will be followed except when, in the judgment of the commander, exceptional circumstances dictate otherwise.

b. joint organization - A joint unit or element with varied functions enabled by a structure through which individuals cooperate systematically to accomplish a common mission and directly provide or support joint warfighting capabilities. Subordinate units and elements coordinate with other units and elements and, as a whole, enable the higher-level joint unit or element to accomplish its mission. This includes the joint staffing (military, civilian and contractor support) required to operate, sustain and reconstitute joint warfighting capabilities.

c. joint training – Training, including mission rehearsals, of individuals, units, and staffs using joint doctrine or joint tactics, techniques, and procedures to prepare joint forces or joint staffs to respond to strategic, operational, or tactical requirements considered necessary by the combatant commanders to execute their assigned or anticipated missions.

d. joint materiel – All items (including ships, tanks, self-propelled weapons, aircraft, etc., and related spares, repair parts, and support equipment, but excluding real property, installations, and utilities) necessary to equip, operate, maintain, and support joint military activities without distinction as to its application for administrative or combat purposes.

e. joint leadership and education – Professional development of the joint commander is the product of a learning continuum that comprises training, experience, education, and self-improvement. The role of professional military education and joint professional military education is to provide the education needed to complement training, experience, and self-improvement to produce the most professionally competent individual possible.

f. joint personnel – The personnel component primarily ensures that qualified personnel exist to support joint capabilities. This is accomplished through synchronized efforts of joint force commanders and Service components to optimize personnel support to the joint force to ensure success of ongoing peacetime, contingency, and wartime operations.
g. joint facilities – Real property consisting of one or more of the following: a building, a structure, a utility system, pavement, and underlying land. Key facilities are selected command installations and industrial facilities of primary importance to the support of military operations or military production programs. A key facilities list is prepared under the policy direction of the Joint Chiefs of Staff.

joint experimentation - An iterative process for developing and assessing concept-based hypotheses to identify and recommend the best value-added solutions for changes in doctrine, organization, training, materiel, leadership and education, personnel and facilities and policy required to achieve significant advances in future joint operational capabilities.

joint force - A general term applied to a force composed of significant elements, assigned or attached, of two or more Military Departments operating under a single joint force commander.

Joint Military Requirement – a capability necessary to fulfill a gap in a core mission area of the Department of Defense.

Joint Operations Concepts (JOpsC) – JOpsC is a family of joint future concepts consisting of a Capstone Concept for Joint Operations, Joint Operating Concepts (JOCs), Joint Functional Concepts (JFCs), and Joint Integrating Concepts (JICs). They are a visualization of future operations and describe how a commander, using military art and science, might employ capabilities necessary to meet successfully challenges 8 to 20 years in the future. Ideally, they will produce military capabilities that render previous ways of warfighting obsolete and may significantly change the measures of success in military operations overall. JOpsC presents a detailed description of “how” future operations may be conducted and provides the conceptual basis for joint experimentation and capabilities-based assessments (CBAs). The outcomes of experimentation and CBA will underpin investment decisions leading to the development of new military capabilities beyond the Future Years Defense Program.

joint potential designator (JPD) - A designation assigned by the Gatekeeper to determine the Joint Capabilities Integration and Development System validation and approval process and the potential requirement for certifications and/or endorsements.

   a. “JROC Interest” designation will apply to all potential or designated ACAT I/IA programs and capabilities that have a potentially significant impact on interoperability in allied and coalition operations. All joint doctrine, organization, training, materiel, leadership and education, personnel, and facilities change recommendation documents (DCRs) will be designated JROC Interest. These documents will receive all applicable certifications, including a
weapon safety endorsement when appropriate, and be staffed through the JROC for validation and approval. An exception may be made for ACAT IAM programs without significant impact on joint warfighting (i.e., defense business systems). These programs may be designated Joint Integration, Joint Information, or Independent.

b. “JCB Interest” designation will apply to all ACAT II and below programs where the capabilities and/or systems associated with the document affect the joint force and an expanded joint review is required. These documents will receive all applicable certifications, including a weapon safety endorsement when appropriate, and be staffed through the JCB for validation and approval.

c. “Joint Integration” designation will apply to ACAT II and below programs where the capabilities and/or systems associated with the document do not significantly affect the joint force and an expanded joint review is not required. Staffing is required for applicable certifications (information technology and National Security Systems (NSS) interoperability and supportability and/or intelligence), and for a weapon safety endorsement, when appropriate. Once the required certification(s)/weapon safety endorsement are completed, the document may be reviewed by the FCB. Joint Integration documents are validated and approved by the sponsoring component.

d. “Joint Information” designation applies to ACAT II and below programs that have interest or potential impact across Services or agencies but do not have significant impact on the joint force and do not reach the threshold for JROC Interest. No certifications or endorsements are required. Once designated Joint Information, staffing is required for informational purposes only and the FCB may review the document. Joint Information documents are validated and approved by the sponsoring component.

e. “Independent” designation will apply to ACAT II and below programs where the capabilities and/or systems associated with the document do not significantly affect the joint force, an expanded review is not required, and no certifications or endorsements are required. Once designated Independent, the FCB may review the document. Independent documents are validated and approved by the sponsoring component.

Joint Requirements Oversight Council memorandum (JROCM) - Official JROC correspondence generally directed to audiences external to the JROC. JROCMs are usually decisional in nature.

Joint urgent operational need (JUON) - An urgent operational need identified by a combatant commander involved in an ongoing named operation. A JUON’s main purpose is to identify and subsequently gain Joint Staff validation and resourcing solution, usually within days or weeks, to meet a specific high-priority combatant commander need. The scope of a combatant commander
JUON will be limited to addressing urgent operational needs that: (1) fall outside of the established Service processes; and (2) most importantly, if not addressed immediately, will seriously endanger personnel or pose a major threat to ongoing operations. They should not involve the development of a new technology or capability; however, the acceleration of a JCTD or minor modification of an existing system to adapt to a new or similar mission is within the scope of the JUON validation and resourcing process.

**key performance parameters (KPP)** - Those attributes of a system that are considered critical or essential to the development of an effective military capability. KPPs must be measurable and testable to enable feedback from test and evaluation efforts to the requirements process. KPPs are validated by the Joint Requirements Oversight Council (JROC) for JROC Interest documents, by the Joint Capabilities Board for JCB Interest documents, and by the DOD component for Joint Integration, Joint Information, or Independent documents. Capability development and capability production document KPPs are included verbatim in the acquisition program baseline.

**key system attribute (KSA)** – An attribute or characteristic considered crucial to achieving a balanced solution/approach to a system, but not critical enough to be designated a KPP. KSAs provide decision makers with an additional level of capability performance characteristics below the KPP level and require a sponsor 4-star, Defense agency commander, or Principal Staff Assistant to change.

**lead DOD component** - The Service or agency that has been formally designated as lead for a joint program by the Milestone Decision Authority. The lead component is responsible for common documentation, periodic reporting, and funding actions.

**materiel availability** - a measure of the percentage of the total inventory of a system operationally capable (ready for tasking) of performing an assigned mission at a given time, based on materiel condition.

**materiel solution** – Correction of a deficiency, satisfaction of a capability gap, or incorporation of new technology that results in the development, acquisition, procurement, or fielding of a new item (including ships, tanks, self-propelled weapons, aircraft, etc., and related software, spares, repair parts, and support equipment, but excluding real property, installations, and utilities) necessary to equip, operate, maintain, and support military activities without disruption as to its application for administrative or combat purposes. In the case of family of systems and system of systems approaches, an individual materiel solution may not fully satisfy a necessary capability gap on its own.

**milestones** - Major decision points that separate the phases of an acquisition program.
Milestone Decision Authority (MDA) - The individual designated, in accordance with criteria established by the Under Secretary of Defense for Acquisition, Technology and Logistics, the Assistant Secretary of Defense (Networks and Information Integration), for Automated Information System acquisition programs, or by the Under Secretary of the Air Force, as the DOD Space MDA, to approve entry of an acquisition program into the next phase.

net-centric - Relating to or representing the attributes of a net-centric environment. A net-centric environment is a robust, globally interconnected network environment (including infrastructure, systems, processes, and people) in which data is shared timely and seamlessly among users, applications, and platforms. A net-centric environment enables substantially improved military situational awareness and significantly shortened decision-making cycles.

non-materiel solution - Changes in doctrine, organization, training, materiel, leadership and education, personnel, facilities, or policy (including all human systems integration domains) to satisfy identified functional capabilities. The materiel portion is restricted to commercial or nondevelopmental items that may be purchased commercially or by purchasing more systems from an existing materiel program. The acquisition of the materiel portion must comply with all acquisition policies (reference b).

operational effectiveness - Measure of the overall ability to accomplish a mission when used by representative personnel in the environment planned or expected for operational employment of the system considering organization, doctrine, supportability, survivability, vulnerability, and threat.

requirements manager – A military manager or DOD civilian manager charged with assessing, developing, validating, and prioritizing requirements and associated requirements products through the Joint Capabilities Integration and Development System process. Requirements managers are identified by the sponsor and are certified by Defense Acquisition University upon completion of the appropriate courses.

Senior Warfighters’ Forum (SWarF) - The SWarF is a mechanism by which a combatant commander can engage with his senior warfighting counterparts to identify the issues and capabilities associated with a particular mission or function of one or more combatant commands. The scope of a SWarF is defined by the combatant commander leading the effort.

sponsor - The DOD component, principal staff assistant, or domain owner responsible for all common documentation, periodic reporting, and funding actions required to support the joint DCR implementation or the capabilities development and acquisition process for a specific capability proposal.
system of systems (SoS) - A system of systems is “a set or arrangement of systems that results when independent and useful systems are integrated into a larger system that delivers unique capabilities.

validation - The review of documentation by an operational authority other than the user to confirm the operational capability. Validation is a precursor to approval.

validation authority - The individual within the DOD components charged with overall capability definition and validation. In his role as Chairman of the Joint Requirements Oversight Council (JROC), the Vice Chairman of the Joint Chiefs of Staff is the validation authority for all potential major defense acquisition programs. The validation authority for Joint Capabilities Integration and Development System documents is dependent upon the joint potential designator of the program or initiative as specified below:

   a. JROC Interest - JROC
   b. JCB Interest - JCB
   c. Joint Integration - Sponsor
   d. Joint Information - Sponsor
   e. Independent – Sponsor