



CHAIRMAN OF THE JOINT CHIEFS OF STAFF INSTRUCTION

DOM/SJS
DISTRIBUTION: A, C

CJCSI 5124.01
12 April 2013

CHARTER OF THE KNOWLEDGE MANAGEMENT CROSS-FUNCTIONAL TEAM

References:

- a. JSI 5111.01, 23 December 2011, "Procedures Related to the Conduct of Joint Staff Led or Co-Led Cross-Functional Teams"
- b. DJSM 0610-06, 12 June 2006, "Enterprise Content Management Working Group (ECMWG)"
- c. JSN 5110, 13 July 2012, "Information Technology Working Group"

1. Purpose. To establish the Knowledge Management Cross-Functional Team (KM CFT) as described in reference a, and define its missions and functions. The KM CFT is a governing entity responsible for improving knowledge management across the Joint Staff (JS), as well as mentoring and promulgating knowledge management best practices across the Services, combatant commands, and combat support agencies. In short, it ensures lessons learned and best practices filter up and across while strategic guidance from the JS guides priority of effort.

2. Cancellation. JS Notice 5124, 19 November 2010, Knowledge Management Board Charter, has been cancelled. Information regarding the Joint Staff Knowledge Management Board has been incorporated into this CJCS instruction.

3. Applicability. This instruction applies to the Joint Staff, the Services, combatant commands, and combat support agencies.

4. Policy. Enclosure A defines the Joint Staff KM CFT membership, scope of activities, organization, battle rhythm, policy and procedures, and organizational relationships internal and external to the Joint Staff.

5. Definitions

a. Knowledge Management (KM) is a business approach to integrating people, process and technology. It is a shared role across the Joint Staff to achieving an efficient, timely, knowledge enabled organization.

b. Working Groups and Tiger Teams. The KM CFT will have oversight of Joint-Directorate (J-Dir) working groups and tiger teams, each established to manage/review/change policies, processes or enabling technologies that impact across the Joint Staff and applicable collaborating organizations. Each will function under its own charter with specified scope of responsibility and metrics.

6. Responsibilities

a. The designated lead for the KM CFT is the Vice Director of the Joint Staff. The Chief of the Information Management Division, Secretary Joint Staff (SJS IMD) will coordinate the day-to-day activities, act as the Secretary and provide secretariat support for the KM CFT to include ensuring that minutes are taken and published from each meeting of the Knowledge Management Board, Knowledge Management Synchronization Cell, Content Management Working Group, Joint Knowledge Management Working Group, and other working groups when created.

b. Each J-Dir and Director of Management (DOM) component will provide representation to the KM CFT as described in Enclosure A. Enclosure A also contains operating instructions and guidelines for the KM CFT and its constituent working groups and tiger teams.

c. In accordance with reference a, only the Top 5, Joint Directors, and Joint Staff Actions Division can task the KM CFT. The KM CFT may task via the authority of the Vice Director of the Joint Staff.

7. Summary of Changes. None.

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:



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Enclosures:

- A - Knowledge Management Cross-Functional Team Policy and Procedure
- GL - Glossary

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ENCLOSURE A

KNOWLEDGE MANAGEMENT CFT PROCESSES POLICIES AND PROCEDURES

1. **Background.** Knowledge management improves efficiency, effectiveness, and innovation across the Joint Staff and throughout the Department of Defense. As a force, we plan, train, operate, and fight better when we properly apply the basic principles encapsulated in Knowledge Management (KM). Table 1 lists the KM principles.

Knowledge Management Principles		
People	1	Train and educate KM leaders, managers, and champions.
	2	Reward knowledge sharing and make knowledge management career rewarding.
	3	Establish a doctrine of collaboration.
	4	Use every interaction, whether face-to-face or virtual, as an opportunity to acquire and share knowledge.
	5	Prevent knowledge loss.
Process	6	Protect and secure information and knowledge assets.
	7	Embed knowledge assets (links, podcasts, videos, documents, simulations, wikis...) in standard business processes and provide access to those who need to know.
	8	Use legal and standard business rules and processes across the enterprise.
Technology	9	Use standardized collaborative tool sets.
	10	Use Open Architectures to permit access and searching across boundaries.
	11	Use a robust search capability to access contextual knowledge and store content for discovery.
	12	Use portals that permit single sign-on and authentication across the global enterprise including partners.

Table 1. KM Principles

The Joint Staff knowledge management process has a bottom-up focus where lessons learned and best practices filter up from the directorates, the Services, combatant commands and combat support agencies while strategic guidance from Vice Director of the Joint Staff guides priority of effort. To achieve this end, the KM CFT will use the following groups:

- a. The Knowledge Management Board (KMB) to develop the JS KM strategic roadmap and provide guidance and direction to the Joint Staff via the Quarterly Strategic Guidance Memorandum, in support of the Chairman’s strategic direction. The KMB also provides the authority for staffing actions initiated by the Services, combatant commands and combat support agencies.

b. The Knowledge Management Synchronization Cell (KMSC) to act as a day-to-day guide for KM operations of the Joint Staff in support of the JS KM strategic roadmap. The KMSC will also act as a clearinghouse for prioritizing the implementation of best practices across the Joint Staff.

c. The Content Management Working Group to implement the strategic guidance to the Joint Staff, but also used to inform the KMB of current issues, best practices and lessons learned from across the directorates.

d. Tiger Teams to focus on KM challenges that require subject, technical, or process expertise to refine issues for either working group.

e. Additionally, the KM CFT will provide guidance and mentorship to the Services and combatant commands via the Joint Knowledge Management Working Group regarding information and knowledge management best practices.

2. Actions, Processes, and Procedures. The KM CFT will assist the Vice Director of the Joint Staff with oversight of KM processes and procedures across the Joint Staff. The following describes the organization, scope, objectives, roles and responsibilities of the KM CFT, and its constituent working groups and teams. At a minimum, the KM CFT will consist of the groups described below. Figure 1 provides a summary of each groups organization and purpose.

a. Knowledge Management Board (KMB):

(1) Scope of Activity. Develop and implement the JS KM strategic roadmap in support of the Chairman's strategic direction.

(2) Objective. Provide formal guidance and direction to the Joint Staff at least quarterly via the KM Quarterly Strategic Guidance Memorandum. Provide joint doctrine and policy recommendations to the Vice Director Joint Staff and other guidance via formal staffing processes as required.

(3) Organization, Roles, Responsibilities:

(a) The chair of the KMB will be the Vice Director of the Joint Staff. Voting membership will be one named GO/FO or SES representative from each J-Dir and O-6/GS-15 representative from the DOM, and a named alternate. The named alternate may be an O-6/GS-15 level representative, but should be the directorate's subject matter expert on KM principles. Voting responsibilities include concurrence on and implementation timeline(s) for revised JS processes.

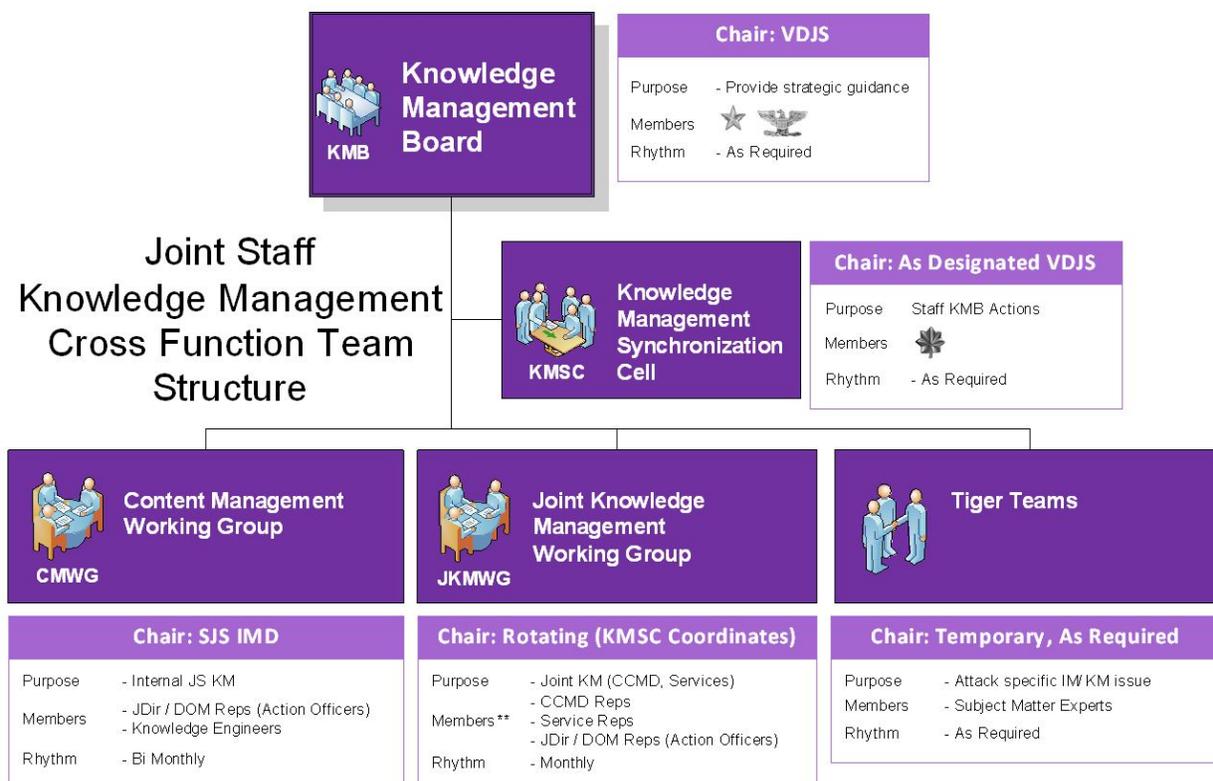


Figure 1. Joint Staff KM CFT Organization

(b) Knowledge Management Engineers (KMEs),¹ subject matter experts (SMEs), and other interested parties may attend or be invited to attend KMB meetings, but voting shall be limited to the chair and voting membership as described above.

(c) The Chief SJS IMD shall solicit from the KMSC the KMB agenda to be approved by the Vice Director of the Joint Staff. The Chief SJS IMD shall solicit a Draft Quarterly Strategic Guidance Memorandum from the KMSC 2-weeks prior to the meeting of the KMB for each of the voting members to review.

(d) The KMB is chartered by this instruction and needs no further charter.

(4) Meeting Schedule Battle Rhythm:

(a) The KMB shall meet as required to review inputs, lessons learned, recommendations and other feedback from the KM CFT working groups.

¹ Knowledge Management Engineers (KME) is synonymous on the Joint Staff with Knowledge Engineers (KE).

(b) The KMB shall promulgate guidance via the Quarterly Strategic Guidance Memorandum. The purpose of the memorandum is to guide priority of effort in implementing new policy, tools, processes, and procedures.

(c) Direction can be given outside the quarterly memorandum as directed by the chair. This can include direction to adopt a staff-wide process, standard, or tool, or to stand up a Tiger Team to address a specific issue or concern.

b. Knowledge Management Synchronization Cell (KMSC):

(1) Scope of Activity. Coordinating members of the KMB and KMEs representing J-Dirs who turn the strategic vision of the KMB into actionable items for the Joint Staff. They set goals and guide progress for the working groups moving toward seamless synchronization and standardization. They also staff KM actions and requests for the services, combatant commanders, and combat support agencies.

(2) Objectives. The KMSC is composed of KM subject matter experts from each directorate and component of the DOM who assist the KMB in the day-to-day operations of the KM CFT. Specifically the KMSC shall:

(a) Identify and optimize knowledge processes common to the Joint Staff by:

1. Unifying staff KM initiatives currently working in parallel.
2. Synthesizing common work into staff-wide Working Groups accountable to the KMB.

(b) Represent their directorates and serve as strategic communicators by carrying information regarding the KM CFT and working groups back to their Joint Directorate to advocate compliance and CFT-brokered KM processes. (Note: The KMSC shall use JSAP-M to staff formal JS policy.)

(c) Align JS KM with Federal and DoD KM/IM/RM initiatives and processes setting the KM standard for the joint community.

(d) Draft the Quarterly Strategic Guidance Memorandum for review by the KMB and signature by the Vice Director of the Joint Staff. The memorandum should take into account best practices, lessons learned, and other feedback from the KM CFT working groups. The memorandum content should prioritize staff effort to develop effective KM in support of the CJCS's strategic goals.

(e) Compile, analyze, and recommend courses of action (COA) as briefed by individual working groups. The KMSC will prepare information and/or decision briefings for the KMB as required; and facilitate prompt execution of the chosen COA.

(f) Hold working groups accountable to their objectives, deliverables, and suspenses. Ensure each process developed has a sponsor and an identified goal or endpoint. Ensure sponsor develops appropriate metrics to track progress.

(g) Provide a venue to J-Dir and DOM components for bringing KM initiatives forward for cross-JS awareness and/or participation as part of a KM working group. Serve as the staffing secretariat for Joint KM issues, concerns, and actions. (Note: The KMSC shall use JSAP-M to staff formal Joint and DoD policy.)

(3) Organization, Roles, Responsibilities:

(a) The chair of the KMSC will be designated in writing by the Chief SJS IMD, with the approval of the Vice Director of the Joint Staff, and will be responsible for coordinating KMSC activities. Voting membership will typically be the named alternate representative from the KMB.

(b) KMEs, SMEs, and other interested parties may participate in KMSC activities, but voting shall be limited to the chair and voting membership as described above.

(c) The KMSC Chair shall determine the KMSC agenda and activities with the assistance of whomever he or she directs.

(d) Representatives shall:

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

2. Help facilitate KMSC meetings.

3. Communicate important information from the KMSC to their respective organizations.

4. Represent their directorates and components and serve as strategic communicators in carrying information regarding the work of the CFT, KM working groups, and JS initiatives back to their organizations, and advocating compliance and buy-in with CFT-brokered KM processes.

(e) The KMSC will facilitate the creation of the KMB agenda, logistics, and administrative support.

(f) The KMSC will maintain a KM CFT collaboration site.

(g) This instruction serves as the charter for the KMSC.

(4) Meeting Schedule Battle Rhythm:

(a) The KMSC shall meet at least monthly to review inputs, lessons learned, recommendations and other feedback from the KM CFT working groups. Meetings may be face-to-face or virtual via the whole range of collaboration tools available to the joint community.

(b) Each quarter, the KMSC shall meet with the J-6 DDITS portfolio management team or be briefed by the Information Technology Working Group to review the status of JS IT projects.

c. Content Management Working Group (CMWG):

(1) Scope of Activity. Activity focus is on organizational communication, streamlining processes, and standardizing technologies and tools across the Joint Staff. It addresses current issues, identifies best practices and provides a forum for J-Dirs to discuss technical issues and enforce efficiencies across the Joint Staff.

(2) Objectives. The CMWG seeks to:

(a) Standardize technologies and tools across the Joint Staff ensuring effective individual and group training is provided in a timely manner.

(b) Address current issues and provide a forum for J-Dirs to suggest solutions that encompass policy, operations, and technical aspects of CM and KM.

(c) Focus on organizational communication and streamlining processes across the Joint Staff.

(d) Identify best practices and reuse of processes.

(e) Enforce transparency, implementation, and efficiencies across the Joint Staff.

(f) Provide a unified, centrally managed approach to collaboration tool governance.

(g) Provide recommendations to the KMB for CM process, tool, or policy changes.

(3) Organization, Roles, Responsibilities:

(a) Per the CMWG charter.² The chair of the CMWG will be the designated representative from SJS IMD. In the absence of the SJS IMD, the role will fall to the representative from J-6 DDITT. Each J-Dir and DOM component should have a representative that is knowledgeable regarding information and knowledge management practices. Directorates may have more than one representative attend, but each directorate and component shall have only one vote.

(b) KMEs, SMEs, and other interested parties should participate consistently in CMWG activities and discussions, but voting shall be limited to the chair and voting membership as described above.

(c) The SJS IMD representative shall determine the CMWG agenda based on the priorities of the KMB's strategic guidance memorandums.

(d) Representatives shall:

1. Consider issues presented to the CMWG and execute specified actions to execute, as appropriate.

2. Attend CMWG meetings.

3. Represent their directorates and components with regard to KM actions. Provide feedback regarding plans and policies implemented throughout the Joint Staff.

4. The CMWG will maintain a collaboration site with links from the KM CFT collaboration site.

5. The CMWG will be an active participant in the KM CFT chat room.

6. IT Working Group (ITWG) Relationship. The ITWG is responsible for maintaining the health of the Joint Staff IT Portfolio. Each J-Dir and DOM CMWG representative shall know their organization's representative to the ITWG and shall stay abreast of IT Portfolio issues and changes.

7. The KMB shall modify the CMWG charter as required.

² DJSM 0610-06, on SIPR at <http://sdseecm.dse.jss.js.smil.mil/rma/drl/objectId/090176c9805a3cb4/format/pdf>

(4) Meeting Schedule Battle Rhythm:

(a) Per the CMWG charter.

(b) In the absence of guidance, the CMWG will continue to execute KM plans and improvements until guidance becomes available.

d. Joint Knowledge Management Working Group (JKMWG):

(1) Scope of Activity. The JKMWG has Joint Directorate, Service, and combatant command representatives who focus on sharing information and knowledge management best practices and lessons learned across the Department of Defense.

(2) Objectives:

(a) Increase KM information sharing across the combatant commands, Services and the larger DoD KM community.

(b) Standardize KM and collaborative best practices and procedures, including technologies, and tools across the Department of Defense.

(c) Address current issues and provide a forum for the Services, combatant commands, and combat support agencies to discuss KM issues.

(d) Focus on organizational communication and streamlining processes across the Department of Defense.

(e) Identify best practices and reuse of processes.

(f) Encourage transparency, implementation, and efficiencies across the Department of Defense.

(g) Promote alignment of Joint KM with other Federal and industry KM/IM/RM initiatives and processes.

(h) Advertise training and sharing opportunities to provide a “market place” to share KM ideas and help standardize practices and content where appropriate.

(3) Organization, Roles, Responsibilities:

(a) The chair of the JKMWG will rotate annually amongst the different Service, combatant command, combat support agency, and Joint Staff representatives. The KMSC shall coordinate who holds the chairmanship, shall

maintain a publicly viewed list, and ensure upcoming organizations know at least three months in advance when they are to be the chairman.

(b) Decisions, when appropriate, will be made generally by consensus with each combatant command, Service, DoD Component and the Joint Staff receiving a vote. Official staff actions, changes to doctrine, policies, or instructions must be done via the JSAP process.

(c) KMEs, SMEs, and other interested parties should actively participate in JKMWG activities, but voting shall be limited to the voting membership as described above.

(d) The rotating chair shall determine the JKMWG agenda and activities for the year they hold the chairmanship. Agendas and activities should be based on the KM Quarterly Strategic Guidance Memorandum, supplemented with standardization of KM best practices and procedures across the Department of Defense.

(e) Representatives shall:

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

2. Serve as strategic communicators by carrying information regarding the JKMWG back to their organization to advocate compliance and JKMWG brokered processes. Note: The JKMWG shall use JSAP to staff formal joint policy.

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

(g) This instruction serves as the charter for the JKMWG.

(h) The SJS IMD shall provide secretariat services to support the JKMWG rotating chairs in order to achieve continuity of operations and consistency of record keeping.

(4) Meeting Schedule Battle Rhythm:

(a) Monthly

(b) Provide KM issues, requirements, and inputs 7-days prior to meeting.

e. Tiger Teams

(1) Scope of Activity. J-Dir and DOM representatives who focus on a specific problem or challenge facing the Joint Staff, such as transition to a new operating system, consolidating several networks, addressing a new security threat or vulnerability, etc. Tiger Teams provide a coordinated response and quick resolution.

(2) Objectives. The KMB shall temporarily form Tiger Teams via the KMSC, CMWG, or JKMWG as needed to address IM/KM issues, implement IM/KM policies, processes or procedures, or deploy IM/KM-enabling technologies to the staff.

(3) Organization, Roles, Responsibilities:

(a) The Tiger Team list, located on the KM CFT website, provides information on the purpose, initiative leader, and location of each tiger team's collaboration site.

(b) The KMB shall charter and register each Tiger Team.

(c) The KMB will determine a functional proponent to serve as POC and key member of the Tiger Team. Additionally, the KMB will vote on and approve Tiger Team charters and lifecycles.

(d) KMB Representatives will ensure that the Tiger Teams have appropriate representation from J-Directorates and Components that have equities at stake.

(4) Meeting Schedule Battle Rhythm. As Directed by Tiger Team Charter.

2. Management

a. The KM CFT will manage all KM-centric working groups that influence personnel and processes across the Joint Staff. The KM CFT Secretariat will record and post the minutes of all KMB, KMSC, CMWG, and JKMWG meetings (and other working groups when formed) in order to promote transparency, maintain the momentum of change, and ensure continuity of effort.

(1) KM working groups will perform against an approved charter and work against established timelines and milestones.

(2) KM working groups will report to the KMSC with monthly milestone updates.

b. The KMSC will maintain information on its main collaboration and communication forums and outputs and actions from meetings on its collaboration site.

c. The KMSC Group will manage administrative support, scheduling, and room acquisition. It will determine the means of reaching consensus on issues brought before the KM CFT.

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GLOSSARY

Term	Definition	Source
Board	An organized group within a headquarters, appointed by the commander or other authority that meets with the purpose of gaining guidance or decision. Its responsibilities and authority are governed by the authority which established the board.	JP 1-02
Best Practices	A non-doctrinal tactic, technique, or procedure that is in current field use and has been critically considered in light of the local situation and capabilities prior to implementation, and appears to be worthy of replication.	CJCSI 3150.25
Cell	A subordinate organization formed around a specific process, capability, or activity within a designated larger organization of a joint force commander's headquarters.	JP 1-02
Content Management	The process of managing content, both digital and non-digital media, in such a way as to provide context for the information consumer. It differs from similar information management activities in that it concerns knowledge products vice pure data or information. Effective content management provides users with immediate and secure access to trusted, relevant knowledge products.	FM 6-01.1
Information Management	The science of using procedures and information systems to collect, process, store, display, disseminate, and protect data, information, and knowledge products. While KM is an art—concerned more about the why of knowledge transfer, information management is a science—focused on the how. It employs both staff management and processes to make information available to the right person at the right time. Information management provides a structure so commanders and staffs can process and communicate relevant information and make decisions.	FM 6-01.1
Knowledge Management	The process of enabling knowledge flow to enhance shared understanding, learning, and decision-making. Knowledge flow refers to the ease of movement of knowledge within and	FM 6-01.1

	among organizations.	
Lessons Learned	An evaluated insight that improves military operations or activities at the strategic, operational, or tactical level and results in an internalized change to an individual or organization.	CJCSI 3150.25
Planning Team	A functional element within a headquarters established to solve problems related to a specific task or requirement, and which dissolves upon completion of the assigned task.	JP 1-02
Records Management	The planning, controlling, directing, organizing, training, promoting, and other managerial activities involving the lifecycle of information including creation, maintenance (use, storage, retrieval), and disposal, regardless of media. Record management procedures are used to achieve adequate and proper documentation of Federal policies and transactions and effective and economical management of Agency and organizational operations as stated in Section of Title 44 of USC.	JSI 5761.01
Working Group	An enduring or ad hoc organization within a joint force commander's headquarters consisting of a core functional group and other staff component representatives whose purpose is to provide analysis on the specific function to users.	JP 1-02