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NATIONAL DEFENSE UNIVERSITY
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JOINT ADVANCED WARFIGHTING SCHOOL



**THE POST-9/11 G.I. BILL: A CATALYST TO CHANGE SERVICE
VOLUNTARY EDUCATION PROGRAMS**

By

Jonathan D. Picker

Captain, U.S. Navy

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EDUCATION PROGRAMS**

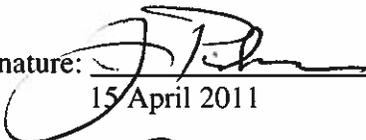
by

Jonathan D. Picker

Captain, U.S. Navy

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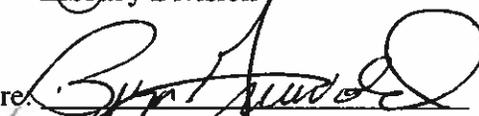
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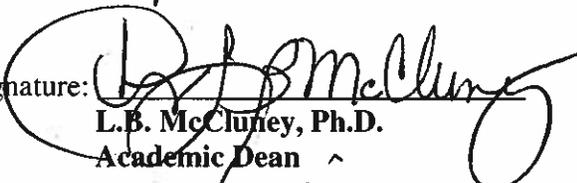
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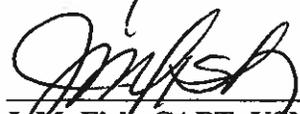
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Joint Advanced Warfighting School

Signature: 
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Academic Dean

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J.M. Fish, CAPT, USN, Director, Joint
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ABSTRACT

This research paper examines the merit of educational benefits provided to military servicemembers through DoD Tuition Assistance and through the Post-9/11 G.I. Bill from a whole-of-government perspective. Prior to the signing of the Post-9/11 G.I. Bill into law, education benefits provided through the Veterans Administration (VA) and DoD were separate and distinct in that these education benefits were not available to the entire force, but rather to targeted groups. G.I. Bill benefits were available to enlisted members plus certain categories of officers after meeting minimum qualification standards. Tuition Assistance is available to the entire active duty force. The resulting change to Title 38 of U.S. Code from the passage of the Post-9/11 G.I. Bill now entitles all servicemembers to educational benefits through the VA, once minimum qualifications are met. Therefore, the key question guiding this paper is whether the implementation of the Post-9/11 G.I. Bill has created a redundant funding mechanism for servicemembers despite the current and foreseeable fiscally constrained environment. Additionally, this paper examines the alignment of educational benefits to the current National Security Strategy.

This topic is explored through a historical survey of applicable programs followed by a discussion of program execution in order to establish a basis for possible avenues for program improvement or changes to law.

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I. INTRODUCTION

The signing of the Post-9/11 Veterans Educational Assistance Act into law on June 30, 2008 provides a unique opportunity to examine the merit of certain educational benefits provided to servicemembers and veterans from a whole-of-government perspective. The United States has a rich legacy of providing educational benefits to the servicemembers of its Armed Forces and has placed value on promoting educational growth for active duty servicemembers and the veterans who served this nation. Education enhances the effectiveness of the force and stimulates the economic potential of the individual and the country. From General George Washington's Continental Army to Admiral Mike Mullen's technologically advanced fighting force we see today, the fabric of U.S. culture is embedded with educational values and is a national interest of the United States. Whether the focus of the military's efforts should be aligned to training or education, both are necessary in the development of a Soldier, Sailor, Marine, Airman and citizen. In very broad terms, education cultivates critical thinking and training teaches skills. Therefore, to enhance combat readiness of the Armed Forces and to mold ideal citizens, we must embrace both.

Prior to 2008, there were two distinct educational benefit programs afforded to active duty servicemembers and veterans. For active duty personnel, tuition assistance was available to all personnel (officer and enlisted) through the Voluntary Education Program of the Department of Defense (DoD). Each military Service administers the Tuition Assistance Program through their respective Voluntary Education Program. Title 10 of U.S. Code provides authority for the Tuition Assistance Program. For veterans and

qualified servicemembers, G.I. Bill educational benefits were entitlements afforded to qualified active duty servicemembers and veterans through the Veterans Administration. Title 38 of U.S. Code provides authority for G.I. Bill entitlements. Both benefits were similar in that they provided funding options to further personal education goals and provided a powerful recruiting tool to the Services in acquiring recruits for an all volunteer force.

Following the 2008 enactment of the newest version of the G.I. Bill, the differentiation between these separate and distinct programs became clouded. The Tuition Assistance Program remains available to all servicemembers of the Armed Forces; however the new G.I. Bill now provides educational benefits to the full spectrum of qualified servicemembers and veterans (all officers regardless of commissioning source and all enlisted personnel). This change to Title 38 due to the enactment of the Post-9/11 Veterans Educational Assistance Act has created an environment where redundant educational benefit opportunities are afforded to current and former members of the Armed Forces from the federal government. Given the current and future fiscal environment, this paper contends that this situation should not be acceptable from the tax payers view point since the U.S. government is paying twice over for a recruiting incentive. Additionally, the author contends that although the current Tuition Assistance Program supports U.S. national interests, it can be improved upon to enhance educational outcomes.

In the introduction to the 2010 National Security Strategy, President Obama makes clear that the United States "...must pursue a strategy of national renewal and global leadership – a strategy that rebuilds the foundation of American strength and influence."

Further, that we “...educate our children to compete in an age where knowledge is capital, and the marketplace is global.”¹ As a strategy statement these goals are consistent with the goals set forth in the Preamble of the U.S. Constitution.

We the People of the United States, in Order to form a more perfect Union, establish Justice, insure domestic Tranquility, provide for the common defense, promote the general Welfare, and secure the Blessings of Liberty to ourselves and our Posterity, do ordain and establish this Constitution for the United States of America.²

The phrase “promote the General Welfare” refers to the culmination of tranquility, justice, and defense which enables every citizen to benefit from government provision that promotes economic growth. Further, to build a foundation for a prosperous economy each American deserves the opportunity to help build that foundation through access to complete and competitive education.³ Additional details from the National Security Strategy are provided in Appendix C.

Therefore, the author poses two key questions. Of the two programs, Tuition Assistance (TA) or the new G.I. Bill, which better supports the national interests of the United States? And secondly, are program modifications justified to ensure a more complimentary funding strategy? The author contends that these education programs support U.S. national interests and that the Department of Defense (DoD) should redefine the TA Program to better use budget authority for improved execution. The 2008 change in Title 38 of U.S. Code justifies such action. The author addresses the following questions to make this case:

¹ White House, *National Security Strategy*, Presidential Report (Washington DC: U.S. Government Printing Office, 2010), i.

² U.S. Constitution, Preamble.

³ White House, *National Security Strategy*, 28.

- What is the ultimate aim of the G.I. Bill and DoD's TA Program?
- What is the Return on Investment (ROI) for a federally funded education to veterans and active duty servicemembers?
- Is there a better way to execute existing programs in order to improve efficiency and save federal funding?

Limitations

The focus of this paper is on education programs administered by Services within DoD. The Coast Guard is not specifically addressed, because even though it receives Title 10 education policy from DoD, it is part of the Department of Homeland Security. Additionally, all discussions throughout are restricted to the active duty component of the Armed Forces and not the Reserves or National Guard.

Throughout the research phase of this paper, the author was prevented from full access to DoD educational data. OSD blocked efforts to gain access to data that was not already publically available due to concurrent congressional inquiries on the predatory practices of for-profit educational institutions. Due to research time constraints, the FOIA process was not utilized to retrieve this data and therefore, there is an artificial limitation on the range of viable options that are presented for consideration.

The author does not focus on the total Voluntary Education Program of each Service and therefore does not examine the merits of Service-specific education programs. Moreover, this paper does not consider, on a broader scale, the merits of an educated populace, but it does address the provision of education programs for military personnel. Specifically, the author places primary focus on the TA Program of each Service.

Methodology

Because there is no holistic body of knowledge on DoD VolEd Program benefits and VA educational entitlements, the author presents research findings in three major sections: (1) program surveys, (2) data analysis of program execution, and (3) actionable options for program improvements. The first major section deals with education information through a historical survey of applicable programs authorized by Title 38 of U.S. Code (G.I. Bill) and of Voluntary Education Programs authorized by Title 10 (TA). The second major section addresses execution details of both aspects of authorized education programs under U.S. Code. This part of the research exposes possible execution redundancies. Finally, the author presents options available to DoD to improve TA Program efficiency⁴ in support of National Security Strategy objectives. This section demonstrates that there are options available to DoD to enhance the return on this monetary investment while building intellectual capital.

⁴ The term **Efficiency** generally describes the most effective manner used for an intended task or purpose with the least waste of time thereby minimizing waste, expense, or unnecessary effort. Efficiency as it will generally apply throughout this paper is the ratio of current education output to a future educational output state ultimately leading to a reduction in federal expenditures.

II. HISTORICAL PERSPECTIVE OF THE G.I. BILL

Introduction

There have been two legislative acts in U.S. history that pertain to education that significantly influenced the course of the nation: the Morrill Act of 1862 and the Servicemen's Readjustment Act of 1944. Both acts changed the educational landscape of America by influencing the subject matter taught in institutions of higher learning and the general make-up of the greater "student body," thereby driving the nation's industry from agrarian, through the industrial and culminating in the technologically based economy we see today.

President Lincoln signed the Morrill Act into law on July 2, 1862. This legislative act was commonly known as the Land Grant Act and established a mechanism that allowed for the creation of institutions of higher learning that provided instruction primarily focused on agriculture and the mechanical arts. This act provided each Senator and Congressman, based on the 1860 census, 30,000 acres of public land that could be sold to establish an endowment to fund support of an industrial college in each state. Ultimately, the act was created "in order to promote the liberal and practical education of the industrial classes in the several pursuits and professions of life"¹ and served the national interests of the U.S. at that time.

The Servicemen's Readjustment Act (G.I. Bill) transformed a generation and helped set the U.S. on a course of incredible achievement. The first recipients of the G.I. Bill

¹ 7 U.S.C. §304

“became part of the greatest investment in higher education that any society ever made”² becoming a new kind of army that moved “onto the landscape of industry, science, art, public policy, all the fields of American life, bringing to them the same passions that served them so well during the war.”³ The G.I. Bill supported the national interests of the U.S. at that time and has into the future.

This chapter highlights the history of the G.I. Bill as background to analyze how the latest version of the G.I. Bill has made the Tuition Program redundant from a whole-of-government perspective.

G.I. Bill Legislation

The World War Adjusted Compensation Act (Bonus Bill)

Considered the precursor to the G.I. Bill, the World War Adjusted Compensation Act of 1924 (also known as the Bonus Bill) was created as a benefit plan for World War I veterans as compensation for service to the United States. The benefit provided servicemembers with an “adjusted service certificate” valued at \$1.00 per day for service within the continental U.S. and \$1.25 per day for overseas service up to a maximum limit of \$1,500. These certificates, otherwise known as “bonuses” since they supplemented the pay and benefits a servicemember received during the war, accrued interest and were payable after maturing 20 years (1945 being the first year a servicemember was eligible). This benefit was payable to the servicemember or immediate family member in case of death.

² Tom Brokaw, *The Greatest Generation* (Random House, 1998), XX.

³ Ibid.

Congress created the Bonus Bill to fill a void following the termination of Civil War pensions and a separate 1917 program that paid allotments to enlisted servicemembers through WWI. This allotment program terminated in 1921 much to the consternation of surviving veterans. This resulted in numerous groups seeking continued benefits for veterans in some form. In response, the 1920 Fordney Bill was proposed to Congress which incorporated a broad benefits program; however the Bill failed to gain needed support because of cost. Subsequently, the Fordney Bill was modified by reducing benefits and costs; approved by Congress in 1922; however, President Harding vetoed the measure for still being too costly to the federal government.

Conservatives argued that costs were too high and there was no need to burden government with another benefit in the face of a stagnant economy. Many, including the Secretary of the Treasury, thought that economic stimuli needed to come through lower taxes while reducing governmental spending. Despite this prevailing argument and thanks to continued pressure from the American Legion and business leaders such as William Randolph Hearst, the reworked and renamed Bonus Bill finally received Congressional approval in 1924 and overrode another presidential veto by President Coolidge.

In 1932 when the country was reeling from the effects of the Great Depression, 30,000 veterans marched on Washington DC seeking relief. Their complaint primarily concerned the inability to collect benefits for another 13 years when they needed immediate relief to survive the conditions of the time. Ultimately, veterans' demands went unfulfilled and many went home peacefully when asked to disperse. For those that remained, President Hoover declared martial law in the city, and General Douglas

MacArthur sent troops into Washington to disperse the demonstrators from what became known as “Hooverville.” This episode became an embarrassment to the nation for the harm it imposed upon civilians and veterans alike. As a result, general public sentiment turned on Congress because of the apparent callous treatment of WW I veterans.

Following the events at “Hooverville,” public debate continued throughout the decade and into WW II on veterans’ benefits. Although the World War Adjusted Compensation Act provided a moderate benefit to veterans, the Act proved to be foundational in the drafting of the first version of the G.I. Bill.

The Serviceman's Readjustment Act

Congress enacted the second most influential piece of legislation pertaining to higher education in 1944, the Serviceman’s Readjustment Act. Commonly known as the G.I. Bill of Rights, the Bill provided tuition assistance, subsistence, books, supplies, and counseling services to WW II veterans for the pursuit of higher education or skills training. An unlikely success story, the intention of the Bill was to mitigate the possible economic backlash caused by the demobilization of millions of military personnel at the end of the war. In all, 2,232,000 veterans used G.I Bill benefits to attend college.⁴

The G.I. Bill was truly an accident. As early as 1943, the Roosevelt Administration began addressing concerns over the end of the war. The administration focused on two issues: the conversion from a wartime to a peacetime economy and the prevention of civil strife caused by returning veterans seeking employment. As he shaped post WWII policy, Roosevelt clearly sought a path that would avoid throwing the country back into another

⁴ U.S. Department of Veterans Affairs, *The GI Bill's History*, www.gibill.va.gov/post-911/history-timeline/ (accessed November 27, 2010).

depression and the “black eye” that was suffered from the incident at “Hooverville.” Consequently, Congress and several agencies explored possible solutions to ensure the maintenance of order throughout the nation.

Based on reports from the National Resources Planning Board (NRPB) and the Armed Forces Committee, Roosevelt pressed the Congress to pass legislature that would provide veterans’ benefits such as unemployment insurance and educational assistance. The NRPB report predicted that there would be “8 or 9 million” unemployed workers during the “readjustment” period. Moreover, the NRPB recommended that educational benefits are granted according to the rate of demobilization and tied to the rate of employment, and that no benefits are granted to those whose employ would be in fields where there was minimal potential for useful employment.⁵

The first draft of the Serviceman’s Readjustment Act is credited to past American Legion Commander, Harry W. Colmery.⁶ Through his efforts, the Bill included language guaranteeing benefits for “a year of education for 90 days’ service, plus one month for each month of active duty, for a maximum of 48 months. Tuition, fees, books and supplies up to \$500 a year would be paid directly to the college or university (at a time when private universities charged about \$300 per year tuition and state universities considerably less). Single veterans were to receive a subsistence allowance of \$50 a

⁵ Keith W. Olson, “The G.I. Bill and Higher Education: Success and Surprise,” *American Quarterly*, Vol. 25, No. 5, 1973: 596-610. The rate of demobilization refers to the rate at which active duty servicemembers were released from service. The rate of employment refers to the rate at which the country could create jobs. The NRPB’s concern was that excessive demobilization would cause unusually high unemployment.

⁶ U.S. Department of Veterans Affairs, *The GI Bill's History*.

month, married veterans \$75 a month.”⁷ This version of the Bill provided substantial educational benefits in addition to benefits for employment, unemployment, mortgages, and various types of training. The Bill went to the House on Jan 10, 1944 and the Senate on Jan 11. Unfortunately for veterans, both approved differing versions and G.I. Bill approval was delayed.

The difference between the two versions of the G.I. Bill concerned unemployment benefits. All agreed on education and home loan benefits, but the difference on unemployment benefits caused a rift between the two branches of Congress. After political maneuvering, Representative John Gibson broke the impasse when he cast the tie breaking vote resulting in the Senate passing the bill on June 12th and the House on June 13th. On June 22, 1944, President Roosevelt signed the G.I. Bill into law. For all of the debate on unemployment benefits, less than 20% of the money set aside for that benefit was ever used.

What many thought to be reaction to abuses of the New Deal, became an accidental success for returning veterans and colleges.⁸ Veterans immediately took advantage of the educational benefits provided in the G.I. Bill. Experts initially believed that only 8 to 12 percent of returning veterans would use this benefit following discharge. “Most predictions, including that of Roosevelt, estimated that college enrollments would increase by only 150,000, with an eventual grand total of about 600,000 to 700,000 by the time the law expired in 1956.”⁹ In reality, 2,232,000 veterans seized this opportunity

⁷ John R. Thelin, *A History of American Higher Education* (Baltimore: The Johns Hopkins University Press, 2004), 263.

⁸ Michael Bennett, *When Dreams Came True* (Washington, DC: Brassey's Inc., 1996), 75.

⁹ Milton Greenberg, *The GI Bill: The Law that Changed America* (New York: Lickle Publishing Inc, 1997), 35.

with as many as 1,000,000 veterans flooding colleges throughout the country in 1947-48, accounting for 49 percent of enrollments. Moreover, a vast majority took their educational benefits to Ivy League institutions. In total by 1956, 7.8 million of 16 million WWII veterans had used G.I. Bill benefits toward an education or a training program.¹⁰

The explosion in enrollments transformed institutions of higher learning throughout America. Consequences of this explosion were more than just numbers, although many institutions saw their enrollments double between 1943 and 1946. One consequence concerned the method of evaluating applicants. In the face of a large application pool, application packages required rapid processing while dealing with a significant percentage of applicants who failed to have traditional transcripts or college preparatory records. Additionally, the means to evaluate students for advanced placement and waivers for course requirements needed improvement. As a result, administrators began accepting proxies for transcripts, and the training and experience for a veteran's military service. Moreover, standardized testing for both admissions and advanced placement received increased emphasis.¹¹ This idea is foundational to the American College of Education (ACE) and the Serviceman's Opportunity Colleges (SOC) system.

The need for space was another significant consequence to the enrollment explosion. In many instances classroom spaces, dormitories and laboratories had to be expanded to meet demand. Classrooms filled to capacity and dormitories were inadequate for this new population of students (including the addition of married couples who now became the

¹⁰ U.S. Department of Veterans Affairs, *The GI Bill's History*.

¹¹ Thelin, *A History of American Higher Education*, 265.

new reality for campus life). Although this period was a challenge, student requirements were met.

A noteworthy phenomenon of the G.I. Bill was the way veterans exceeded the expectations of educators, and the transformed mood on campus. Veterans brought a new maturity and academic appetite never seen before. Veterans possessed a different view of the world, a different sense of urgency, and a greater sense of purpose resulting in exceptional students joining the greater student body. “Veterans not only earned higher grades, but earned higher grades relative to the student body.”¹² Moreover, veterans shaped curriculums on campus. Seeking skills they could translate into employment, veterans gravitated toward degrees in business administration and engineering. To accommodate this new academic demand, schools added professors on campus to meet veterans’ educational needs. In sum, the academic and social transformation was astounding.

The most notable aspect of the Serviceman’s Readjustment Act was the section on education. First, it was an entitlement to veterans meaning that servicemembers earned this benefit by meeting minimum eligibility standards. Second, tuition and subsistence benefits were usable at any federally approved institution of higher learning throughout the country. At last, veterans had a worthwhile benefit that changed a generation and the course of the country. Franklyn B. Snyder, president of Northwestern University, called it “the greatest experiment in democratic education the world has ever seen.”¹³

¹² Olson, “The G.I. Bill and Higher Education: Success and Surprise,” 605.

¹³ Ibid., 606.

The Veterans' Readjustment Assistance Act

On July 16, 1952, President Truman signed the Veterans' Readjustment Assistance Act, commonly known as the Korean Conflict Bill, into law. This was the second iteration of the highly successful G.I. Bill and provided monthly educational assistance to veterans of the Korean Conflict. The basic eligibility requirements for this version of the G.I. Bill were that servicemembers needed to serve more than 90 days after January 27, 1950, must have entered the Armed Forces prior to February 1, 1955, and have received an "other than dishonorable" discharge from the service.¹⁴

The difference in this version of the G.I. Bill from its predecessor stemmed from the prevalence of rampant over-charging from educational and training institutions during the lifespan of the Serviceman's Readjustment Act. This Bill stipulated that benefits would be paid directly to veterans and not to the institutions they were attending. Veterans without dependents received up to \$100 a month for up to 36 months for tuition, books, supplies and living expenses; veterans with one dependent received \$135 per month in benefits and veterans with more than one dependent received \$160 a month in benefits. This noticeable reduction in benefits from the original version of the G.I. Bill was intended to induce veterans to spend wisely since they would be required to contribute for their own education or training. This allowance was paid out in one monthly lump sum payment.

Benefits paid under the Korean Conflict G.I. Bill ended on January 31, 1955. During the course of this program, 2,391,000 of 5,509,000 eligible veterans received training:

¹⁴ U.S. Department of Veterans Affairs, *GI Bill Turns 62 Today*, June 22, 2006, www.military.com/newscontent/ (accessed November 13, 2010).

1,213,000 at institutions of higher learning; 860,000 in below college level education programs; 223,000 in on-the-job training; and 95,000 involved in on-farm training.

Veterans who received their benefits had to initiate their education or training by August 20, 1954 or three years after discharge from active service, whichever was later. Total cost for this version of the G.I. Bill was \$4.5 billion.¹⁵

The Veterans' Readjustment Benefits Act

President Lyndon B. Johnson signed the Veterans' Readjustment Benefits Act into law on March 3, 1966. Commonly known as the Vietnam-Era G.I. Bill, the stated purpose of the third iteration of the G.I. Bill was to enhance the appeal of military service, to extend "the benefits of a higher education to qualified and deserving young persons who might not otherwise be able to afford such an education," and to provide for the restoration of lost employment opportunities to those whose careers were interrupted by the call to military service.¹⁶ This version of the G.I. Bill provided benefits to veterans who did not necessarily serve during a period of combat operations and therefore, was quite different from its predecessors. This meant that veterans who served between 1955 and 1966 were eligible for training and education benefits under the law. Veterans who served after January 31, 1955 were eligible for this benefit and initially were entitled to \$100 per month. This amount grew to \$311 per month by 1977.¹⁷

To be eligible, a veteran needed to serve a minimum of 181 days after January 31, 1955, and receive an "other than dishonorable" discharge from the Armed Forces. Education benefits were not available to veterans after 10 years from their last date of

¹⁵ Ibid.

¹⁶ 38 USC §1651

¹⁷ U.S. Department of Veterans Affairs, *GI Bill Turns 62 Today*.

discharge from active service after January 31, 1951. Benefits to qualified veterans were available for 36 months.

Although the Vietnam-Era G.I. Bill was available to both wartime and peacetime veterans, this version of the Bill had the least buying power of the three versions due to inflation. Benefits increased at various intervals in the 60's and 70's; however, benefits tended to lag behind the increased cost of education. Despite this negative aspect of the bill, the Vietnam-Era G.I. Bill was the first version of the G.I. Bill that allowed a veteran “to take cooperative farm, on-job, flight and correspondence training. Disadvantaged veterans, those who did not finish High School before entering service, were given full VA benefits while completing High School without losing any entitlement for college or other training.”¹⁸

By the time the Vietnam-Era G.I. Bill finished paying benefits to qualified veterans in 1986, “6 million Vietnam-Era veterans, 1.4 million Post-Korean veterans and 751,000 servicemembers trained under the program – a total of 8.2 million.”¹⁹ Of this total, 5.1 million attended colleges, 2.5 million went to other schools, 591,000 received on-the-job training, and 56,000 received on-farm training.²⁰ Again, even though the buying power of this version of the bill was the least of the three bills, the Vietnam-Era G.I. Bill was a tremendous success story; \$42 billion was invested on veterans. The G.I. Bill over the course of this period became the single largest federal program that provided post-secondary education assistance.

¹⁸ Ibid.

¹⁹ Ibid.

²⁰ Ibid.

The Veterans' Education and Employment Assistance Act

The United States began recruiting an all voluntary force in January 1973, a process that brought many challenges for the Services associated with force level requirements. Recruiting military personnel became a significant issue for DoD. One solution for the recruitment dilemma was to create recruiting enticements to induce men and women to join the Services. One of the enticements was the fourth version of the G.I. Bill, the Veterans' Educational Assistance Program (VEAP).

The Veterans' Education and Employment Act established VEAP under Title IV and became effective in December, 1976. This program required enlisted recruits or qualifying officers to make monthly contributions in order to receive benefits as a veteran. Under provisions of this version of the G.I. Bill, participants agreed to make monthly contributions for their future educational benefit in monthly military pay deductions ranging from \$25 to \$100. Withheld servicemember money was placed in an educational fund called the "Post-Vietnam-Era Veterans Education Account" administered by the U.S. Treasury.²¹ Participants could also make one lump sum payment into VEAP while on active duty for a maximum contribution of \$2,700. When a participating veteran wished to draw on his VEAP benefit, the Veterans Administration would match funds on a 2 to 1 basis.

Eligibility requirements for a veteran to receive VEAP benefits were similar to earlier versions of the G.I. Bill. Again, a veteran had to be discharged with an "other than dishonorable" discharge from the Armed Forces and the benefit had to be used within 10

²¹ 38 U.S.C. § 3222(a)

years from the date of discharge from active duty. Once a veteran began receiving education benefits, monthly payments for a maximum of 36 months would be paid out.

Overall, VEAP was considered a failure. Although 668,000 veterans received education and training benefits under VEAP, VEAP failed to entice new enlisted recruits as expected and it provided less power in contributing to the overall expense of an education. A 1980 RAND Study found that a comparative analysis between the G.I Bill and VEAP revealed that “VEAP benefits in 1977 were worth no more than 44 percent, and perhaps as little as 4 percent, as much as G.I. Bill benefits.”²² Inflation eroded the value of VEAP benefits due to the direct reduction in the purchasing power of the benefit, and it raised people’s expectations about future inflation rates.²³ Due to the underwhelming results of this Bill, veterans and lawmakers lobbied for changes in this program leading to a temporary new G.I. Bill in 1984.

The Montgomery G.I. Bill (MGIB)

The Veterans’ Educational Assistance Act (VEAA) was a temporary G.I. Bill measure enacted as a pilot program prior to the creation of the Montgomery G.I. Bill (MGIB). The VEAA became effective on July 1, 1985 and expired on June 30, 1988. The pertinent aspects of the VEAA under Title 38 of U.S.C. were “(1) to provide a new educational assistance program to assist in the readjustment of members of the Armed Forces to civilian life after their separation from military service;...” and “...(4) to promote and assist the All-Volunteer Force program and the Total Force Concept of the Armed Forces by establishing a new program of educational assistance based upon

²² Richard I. Fernandez, *Issues in the Use of Postservice Educational Benefits as Enlisted Incentives*, Research Report (Santa Monica: RAND Corporation, 1980), v.

²³ Ibid.

service on active duty or a combination of service on active duty and in the Selected Reserve (including the National Guard) to aid in the recruitment and retention of highly qualified personnel for both the active and reserve components of the Armed Forces;...”²⁴ The profound aspect of the VEAA was that it extended educational benefits to Selected Reservists of the Armed Forces. It is this VEAA key feature that became foundational for the MGIB since it significantly enhanced recruiting efforts.

Due to the success of the VEAA, this G.I. Bill version was extended and renamed the Montgomery G.I. Bill in honor of Gillespie V. “Sonny” Montgomery, the former Mississippi Congressman and Chairman of the House Veterans’ Affairs Committee. The MGIB became law in 1987 and continued providing VEAA benefits. Eligibility requirements for the MGIB and VEAA were similar to earlier provisions of the G.I. Bill. Essentially, servicemembers who joined the Armed Forces after June 30, 1985 were eligible for benefits as long as they served a minimum of three years on active duty and were honorably discharged.²⁵ The MGIB was also a program that required a contribution much like that required under VEAP. Servicemembers were given the choice at the time they entered service to either elect to participate, or if they desired, elect to not participate. Servicemembers who elected to participate in the MGIB were required to make contributions of \$100 per month for 12 months for a total of \$1,200. If the member was a Selected Reservist, the servicemember was required to make a \$1,200 payment by the end of the first year of enlistment under a two year contract.²⁶ Just like VEAP, the government would match funds on a 2 to 1 basis when a veteran wished to access his

²⁴ 38 U.S.C. §3001 (2010)

²⁵ 38 U.S.C. §3011 (2010)

²⁶ Ibid.

educational benefits. Under the current version of the MGIB, veterans can expect to receive benefits for up to \$1,321 per month for 36 months maximum.²⁷

On November 1, 2000, the Veterans Benefits and Health Care Improvement Act modified MGIB benefits and were codified in Chapter 30 of Title 38, U.S. Code. The primary change to MGIB was that any individual eligible for educational assistance under Title 38 may contribute increased amounts in order to receive an increased amount over the basic educational assistance benefit.²⁸ In other words, a servicemember can make contributions in excess of the \$100 pay allotment requirement. The total amount of this enhanced contribution cannot exceed \$600 and is made in multiples of \$20.²⁹ In order to be eligible to exercise this option, a servicemember has to serve five or more consecutive years of active duty in the Armed Forces without a break in such service.³⁰

MGIB is considered a successful program for the VA due to the number of veterans who have accessed their entitlement; there is no current literature that suggests the termination of this program. Recruiting and retention rely heavily on the promises of educational benefits; recurring surveys reinforce this supposition. As with the many predecessors to MGIB, inflation and the growing cost of an education are outpacing the value of education benefits. MGIB benefits roughly cover half of the out-of-pocket expenses that would be expected in a typical 4 year institution of higher learning. Due to this monetary gap, 2 year colleges provide more value to servicemembers seeking an

²⁷ 38 U.S.C. §3015 (2010)

²⁸ 38 U.S.C. §3011 (2010)

²⁹ Ibid.

³⁰ 38 U.S.C. §3021 (2010)

education.³¹ Unlike provisions of the original G.I. Bill of Rights where a servicemember could afford an Ivy League education plus a stipend, MGIB benefits are not comparable to the benefits originally provided in 1944. This widening gap between benefits provided by the VA and the cost of an education led to the need of a new G.I. Bill.

The Post-9/11 G.I. Bill

President George W. Bush signed The Post-9/11 Veterans Educational Assistance Act into law on June 30, 2008. The Post-9/11 Veterans Educational Assistance Act, also known as the Post-9/11 G.I. Bill, offers the most comprehensive package of educational benefits since the 1944 G.I. Bill of Rights. This new version of the G.I. Bill provides eligible veterans with educational benefits that cover the cost of tuition and mandatory fees at the highest in-state rate where a veteran resides plus a monthly stipend for living expenses. Additionally, the Post-9/11 G.I. Bill allocates funds for books and tutoring. In total, this is an extremely generous benefit when compared to past G.I. Bill educational benefits and the cost of attaining an education at an institution of higher learning.³²

The Post-9/11 G.I. Bill was born in a very similar fashion to that of the G.I. Bill of Rights. Created as a mechanism for WW II demobilizing, the G.I. Bill of Rights provided an avenue for servicemembers to continue on their educational journey and to assist in the readjustment process.³³ The Post-9/11 G.I. Bill was created as a consequence to the events of 9/11 and the ensuing war on terror so that veterans had a benefit that had value when they left the Armed Forces. Specifically,

³¹ Klemm Analysis Group, Inc., Final Report, *Program Evaluation of the Montgomery GI Bill* (38 U.S.C., Chapter 30). April 17, 2000.

³² Public Law 110-252, 122 Stat 2323

³³ Frederic A. Delano, *Demobilization and Readjustment*, Congressional (Washington, DC: National Resources Planning Board, 1943), 42-43.

(3) The United States has a proud history of offering educational assistance to millions of veterans, as demonstrated by the many G.I. Bills enacted since World War II. Educational assistance for veterans helps reduce costs of war, assists veterans in readjusting to civilian life after wartime service, and boosts the United States economy, and has a positive effect on recruitment for the Armed Forces. (4) The current educational assistance program for veterans is outmoded and designed for a peacetime service in the Armed Forces. (5) The people of the United States greatly value military service and recognize the difficult challenges involved in readjusting to civilian life after wartime service in the Armed Forces. (6) It is in the national interest for the United States to provide veterans who serve on active duty in the Armed Forces after September 11, 2001, with enhanced educational assistance benefits that are worthy of such service and are commensurate with the educational assistance benefits provided by a grateful Nation to veterans of World War II.³⁴

The Post-9/11 G.I. Bill was originally introduced by Senator James Webb as part of the Post-9/11 Veterans Educational Assistance Act of 2007. The version of the Bill that was enacted in 2008 was sponsored by Senators John McCain, Lindsey Graham, and Richard Burr and was part of the Enhancement of Recruitment, Retention and Readjustment through Education Act.³⁵ Although the Webb-sponsored bill provided significant improvement over the MGIB, many felt, and justified in vote, that the Graham-Burr-McCain Bill provided a more uniform distribution of benefits while also encouraging continued service since the benefit could be fully used while on active duty.

General provisions of the final version of the Post-9/11 G.I. Bill that can be accessed today by veterans with 36 months of active service after 9/11/01 are:

- Full tuition at a rate not to exceed the maximum amount charged in-state students for full-time pursuit of programs of education at a public institution of higher

³⁴ H.R. 2642, §5002

³⁵ Public Law 110-252, §3311

learning.³⁶ This amount will be capped at \$17,500 annually for public, private and foreign institutions effective August 1, 2011.³⁷

- A monthly stipend to students where over 50% of the course of study is not through Distance Learning at a rate equal to the amount of basic housing allowance for pay grade E-5 at the school’s primary ZIP Code.³⁸
- A stipend for books, supplies, and equipment equal to \$1,000 multiplied by the fraction of the academic year the term constitutes.³⁹

In order to satisfy Post-9/11 veterans who had less than 36 months of service following 9/11/01, graduated rates ranging from 40% for at least 90 days of service to 100% at 36 months are offered. Table II-1 provides the specific rate gradations for active duty personnel.

Table II-1. Post-9/11 G.I. Bill graduation rates.⁴⁰

Active Duty Completed after Sep 10, 2001	Percentage of Maximum Amount Payable
At least 36 months	100 %
At least 30 consecutive days on active duty and discharged due to service-connected injury	100 %
30 to 36 months	90 %
24 to 30 months	80 %
18 to 24 months	70 %
12 to 18 months	60 %
6 to 12 months	50 %
90 days to 6 months	40 %

³⁶ Public Law 110-252, §3313, (c), (A)

³⁷ U.S. Department of Veterans Affairs, *Upcoming Changes to the Post-9/11 GI-Bill*, http://gibill.va.gov/post-911/post-911-gi-bill-summary/post911_changes.html (accessed January 14, 2011).

³⁸ Public Law 110-252, §3313, (c), (B)

³⁹ Public Law 110-252, §3313, (c), (C)

⁴⁰ U.S. Department of Veterans Affairs, *The Post-9/11 GI-Bill*, www.gibill.va.gov/post-911/post911-gi-bill-summary/ (accessed November 27, 2010).

Again, Post-9/11 G.I. Bill educational benefits are authorized while on active duty or within 15 years of discharge even if discharge occurred prior to the enactment of this Bill.

One unique feature of the Post-9/11 G.I. Bill is the option to transfer benefits to a dependent. This provision is clearly a retention incentive to military servicemembers. By serving six years in the Armed Forces and committing to another four years, a servicemember is eligible to transfer benefits. The servicemember can elect to transfer educational benefits to a spouse after six years of service with a commitment for four additional years or to dependent children after 10 years of service. The servicemember can also transfer a combination of educational benefits to both the spouse and children. The only other stipulation to transfer benefits is that the servicemember must make the transfer while on active duty. The provisions of this feature apply to widows, but not to a former spouse through divorce proceedings, since this benefit is not considered as marital property in civil court.⁴¹

The discussion of the Post-9/11 G.I. Bill thus far would lead one to believe that the educational benefits provided under the Bill favor public institutions of higher learning when in fact they do not. Included in the Bill is a provision to close the gap between the cost of public and private education called the Yellow Ribbon G.I. Enhancement Program, commonly known as the Yellow Ribbon Program. The program establishes a relief process when the full cost of tuition and mandatory fees exceed the in-state tuition threshold. This program is a voluntary program in which colleges or universities can enter into a dollar matching agreement with the Veterans Administration (VA). Essentially, the institution of higher learning can enter into a contract with the VA to

⁴¹ Public Law 110-252, §3319

cover a portion of the charges up to 50% of the total remaining charges for tuition and mandatory fees, which the VA will match. Not all private institutions are covered under the Yellow Ribbon Program since the institution must seek out participation. Therefore, the law requires the VA to provide a list of all participating colleges or universities plus information on how a school can become a program member on its website.⁴²

In review, key elements of the Post-9/11 G.I. Bill that separate it from past forms of the G.I. Bill include:

1. The benefit is available to all officers regardless of commissioning source and to all enlisted personnel (active and reserve).
2. Educational benefits can be fully used while on active duty.
3. Funds are only payable to institutions of higher learning.
4. Educational benefits can be transferred to immediate family members.
5. The benefit rewards continued service in the Armed Forces.
6. Improvements to the Bill are ongoing and execution of educational services provided by the VA continues to improve.

Taken in total, the Post-9/11 G.I. Bill is the most powerful form of the G.I. Bill since the G.I. Bill of Rights and is in some ways an even more powerful benefit to active duty personnel or veterans.

Does the Post-9/11 G.I. Bill support the National Security Strategy of the U.S.? As reiterated in Title 38 of U.S. Code, "...It is in the national interest for the United States to provide veterans who serve on active duty in the Armed Forces after September 11, 2001,

⁴² Public Law 110-252, §3317

with enhanced educational assistance benefits that are worthy of such service and are commensurate with the educational assistance benefits provided by a grateful Nation to veterans of World War II.”⁴³

⁴³ H.R. 2642, §5002

III. HISTORICAL PERSPECTIVE OF SERVICE VOLUNTARY EDUCATION PROGRAMS

Introduction

Much like the history of educational benefits afforded to veterans, the history of in-service education provided to military servicemembers is equally rich. From a prevailing attitude in the 19th century where "...most officers were opposed to any elaborate scheme of education because it detracted from the enlisted man's regular duties and because they believed the "school of hard knocks" to be the best educational force"¹ to today's attitude where many in the Armed Forces embrace education, the military and the United States have come a long way on their educational journey.

The first appearance of formal in-service education is found in an 1838 statute that allowed each military post to hire a chaplain so that in addition to their normal pastoral duties they could also act as the Post schoolmaster. Although the preponderance of education provided to soldiers was based on religion with the bible as the first text book, it was the beginning of in-service education since soldiers were being taught to read and write.²

The United States began pursuing in-service voluntary education in earnest on June 3, 1916 when a provision to U.S. Code was added to Title 10 in Section 1176 authorizing "instruction of soldiers in addition to military training."

¹ Bruce White, "ABC's for the American Enlisted Man: The Army Post School System, 1866 – 1898," *History of Education Quarterly*, Vol. 8, No. 4, 1968: 479.

² Steve F. Kime, *Servicemembers Opportunity Colleges: 30 Years*, SOC FY 2003 Final Report (Washington, DC: Servicemember Opportunity Colleges, 2003), 1.

In addition to military training, soldiers while in active service shall hereafter be given the opportunity to study and receive instruction upon educational lines of such character as to increase their military efficiency and enable them to return to civil life better equipped for industrial commercial and general business occupations. Civilian teachers may be employed to aid the Army officers in giving such instruction, and part of this instruction may consist of vocational education either in agriculture or the mechanic arts.³

This section of Title 10 came to life in the ensuing years as Post libraries were built with funds raised by the American Library Association. Organized educational courses and classes could now be taught on military installations. To offer courses that were in demand at the time, the Army sought out the services of the Young Men's Christian Association (YMCA) educational department. The YMCA in turn facilitated the provision of university extension courses and when possible, education services at civilian colleges in the local community. The predominant need in education around World War I was instruction in the English language to soldiers who did not speak or were not fluent in English. "In one National Army cantonment alone, two thousand men were enrolled in classes to learn to read and write English. The war thus became by accident the means of doing something toward solving one of the pressing problems of Americanization."⁴

Today, the in-service voluntary education (VolEd) programs provided through DoD comprise one of the largest employer-provided education programs in the world. VolEd Program yearly involvement comprises approximately 25 percent of the military and its footprint spans the globe on every military installation, even in Afghanistan.⁵ Whether VolEd participation occurs in a classroom or through Distance Learning, education is a

³ U.S.C. 1946 edition, taken from Steve F. Kime, *Servicemembers Opportunity Colleges: 30 Years*, SOC FY 2003 Final Report (Washington, DC: Servicemember Opportunity Colleges, 2003).1.

⁴ John Dickinson, *The Building of an Army* (New York: The Centruy Co., 1922), 227.

⁵ Data derived from Appendix A and VolEd Fact Sheets.

funding priority for DoD, in particular off-duty and voluntary, and is evident in yearly National Defense Appropriation Acts.⁶

This chapter will provide an overview of the in-service voluntary education program and offerings facilitated through DoD. At the conclusion of this chapter, the reader will better understand Title 10 educational programs and services in order to facilitate a comparative analysis of Title 10 and Title 38 educational benefits later in this paper.

Department of Defense

Title 10 of U.S. Code provides authority to DOD to fund and execute voluntary education programs. Specifically, “the Secretary concerned may pay all or a portion of the charges of an educational institution for the tuition or expenses of a member of the Armed Forces enrolled in such education or training during the member’s off-duty periods.”⁷ DoD provides Title 10 voluntary education program policy guidance to each the military Service. These voluntary education programs enable servicemembers to enroll in post secondary schooling so that associate, bachelors, masters, and doctoral degrees may be pursued. Additionally, DoD provides basic skills education and testing to ensure success in the classroom.

Per DoD Directive 1322.08, it is DoD’s policy to:

- Establish and maintain programs that offer servicemembers educational opportunities so that they may participate voluntarily during off-duty hours.
- Provide voluntary education opportunities that are comparable to those found by citizens who are not part of the military. These opportunities must be available to all

⁶ www.voled.dod.mil/voled_web/voledprogramscope.htm (accessed Jan 2011)

⁷ 10 U.S.C. §2007(a)

active duty personnel regardless of duty location, available in a classroom setting or through distance learning. These programs must be accredited post secondary vocational programs or degrees.

- Provide Tuition Assistance through each military Service to support a servicemember's individual pursuit of academic goals.
- Provide educational counseling services through each military Service so that a servicemember makes the most efficient use of government funds.
- Provide basic educational and academic skills training in order to facilitate enhanced job performance through each of the military Services.⁸

This means that each military Service will provide in the most rudimentary form: educational counseling, tuition assistance, and basic/academic skills training. In order to facilitate the aforementioned, the Department oversees these core functions through the following:

- Provide an academic examination program. The American Council of Education (ACE) administers the program and is managed by the Defense Activity for Non-Traditional Education Support (DANTES) to provide testing services at no cost to servicemembers. The Scholastic Achievement Test (SAT), the General Education Development (GED) test, the Graduate Record Exam (GRE), and the College Level Examination Program (CLEP) are examples of provided testing services.
- Facilitate a credentialing examination program that provides testing services for certification and licensure exams at no cost to servicemembers. DANTES executes this program.

⁸ DOD Directive 1322.08E, Jan 3, 2005

- Higher education programs that include the Servicemembers Opportunity Colleges (SOC) program and the Military Installation Voluntary Education Review (MIVER) program. SOC is a consortium of colleges that is administered by the American Association of State Colleges and Universities (AASCU) and was established in 1972. Consortium colleges award credit for military training, agree to transfer credits amongst colleges within the consortium, and accept credit for learning demonstrated through nationally recognized testing programs. Additionally, SOC has established degree networks for each of the Services in order to recognize more specialized training. These degree networks include SOCNAV, SOCAD and SOCMAR. The MIVER program is administered by ACE and provides for a third-party review of the total voluntary education program provided on a military installation. These on-site reviews are conducted to ensure quality programs are being provided to all Servicemembers.

- Provide an Academic Skills Program. DANTES currently fulfills this requirement through a contract with Peterson's© for their Online Academic Skills Course (OASC). The program is provided at no cost to servicemembers and is designed to build reading comprehension, vocabulary, and math skills.⁹ Although intended as a strictly online application, the Army utilizes this software in a facilitated learning environment while the other Services do not. Despite this minor execution difference, OASC is the only example of a DoD education program that is funded/executed jointly.

The organizational hierarchy for voluntary education execution within DoD is:

1. DoD provides policy guidance to Services and exercises policy control over DANTES.

⁹ U.S. Department of Defense, *DANTES*, www.dantes.doded.mil (accessed November 10, 2010).

2. Department of the Navy. Designated as Executive Agent over DANTES and is responsible to provide resources that are adequate to execute its mission.

3. Military Services. Fund and execute individual voluntary education programs.¹⁰

Defense Activity for Non-Traditional Education Support (DANTES)

Established in 1974, the Defense Activity for Non-Traditional Education Support (DANTES) is an inter-service Defense agency that replaced the United States Armed Forces Institute. DANTES has remained unchanged since 1974 and the mission of this organization is to support the off-duty, voluntary education functions of the Office of the Secretary of Defense (OSD) and to conduct special projects and development activities in support of education related functions of DoD.¹¹ The Navy is the Executive Agent for DANTES and as such, administers and funds this agency.

The primary role of DANTES is to provide consolidated management of certain voluntary education programs to prevent duplication of effort amongst the Services. These services include: the management of examination and certification programs, contract management of education evaluation functions, contract management of SOC, manage an independent study support system, contract management of installation education review program (MIVER), and issue transcripts, upon request, to DoD Dependent Schools students and for the examination and certification programs. In its current capacity, DANTES is the lead proponent of non-traditional education within

¹⁰ U.S. Department of Defense, *Voluntary Education Programs for Military Personnel*, (Washington DC: DODD 1322.08E, January 3, 2005).

¹¹ U.S. Department of Defense, *Voluntary Education Programs*, (Washington DC: DODI 1322.25, May 3, 2010).

DoD.¹² Of all voluntary education agencies within DoD, DANTES demonstrates promise to take-on new roles with an expansion of duties in the proposed consolidation efforts that are explored later by the author.

Army Voluntary Education

The Army's Continuing Education System (ACES) provides Army voluntary education. ACES reports to the Deputy Chief of Staff of the Army and is a division of The Adjutant General Directorate, U.S. Army Human Resources Command. Governed by Army Regulation 621-5, ACES' mission is to "promote lifelong learning opportunities and sharpen the competitive edge of Army, 2010 and beyond."¹³ ACES accomplishes this mission with a wide array of programs and services that align with overall DoD guidance.

Due to the age and size of the Army, educational developments in voluntary education have tended toward evolutionary change over revolutionary change. Many events have led to the ACES organization seen in the Army today, but noteworthy amongst this rich history and particularly pertinent to the VolEd Program and continuing education are:

- December 24, 1941. The War Department authorizes the establishment of the Army Institute as a correspondence school for Army enlisted soldiers.
- August 1, 1944. The Army Education Plan becomes part of the official War Department plan for the readjustment of military personnel after the defeat of Germany.

¹² Ibid.

¹³ U.S. Army Department, *Army HRC, U.S. Army Resources Command*, www.hrc.army.mil (accessed January 11, 2011).

- May 7, 1947. War Department Memorandum No. 85-40-1 establishes Army policy for tuition assistance for soldiers enrolled in civilian colleges and universities during off-duty time.
- February 20, 1957. Army Regulation 621-5, General Educational Development, is first published.
- February 13, 1973. Report on the Army Education Program in the Voluntary Environment is published by the Department of the Army. This report sets new parameters for the Army's General Educational Development Program.
- November 5, 1973. Army announces first Service-wide Education Services Plan identifying educational needs of a soldier and the Army while suggesting the means needed to attain this objective.¹⁴

Each of these events in its own way has helped shape the continuing education system of the Army and has influenced the other Services to some degree.

The Army's Director of Education heads ACES and is responsible for managing the continuing education system within the Army. The Director is primarily responsible for providing strategic policy guidance, the submission of the budget as part of the Program Objective Memorandum (POM) process, and execution of the TA process. The majority of execution responsibilities are dispersed to Post Commanders and their assigned Education Services Officers (ESO). ESOs manage Post Education Centers and libraries, and are the contact points for soldiers. Two unique features of the Army VolEd Program that synchronize execution of education programs are GoArmyEd and eArmyU.

¹⁴ Clinton L. Anderson, "Remembering Those Who Have Made a Difference in United States Military Education," in *Department of Defense Worldwide Education Symposium* (Orlando: Compact Disk Productions, 2006), 16-21.

The eArmyU program became available to Soldiers throughout the Army on October 1, 2004. The program began in 2001 on selected installations and offered enlisted Soldiers an opportunity to work on college courses or certificate programs online. Today, the program is administered by ACES and is a leader in e-learning and provides over 100 online degree plans at regionally accredited colleges and universities that lead to an associate degree, bachelor's degree or master's degree. The program is designed to offer flexibility in the educational journey of a Soldier due to the deployment requirements of the Service. Classes are interchangeable amongst participating schools and offer a high degree of convenience to the servicemember.¹⁵

The second unique aspect of Army education is its virtual portal called GoArmyEd. Developed and managed by IBM, the portal provides a "one stop shop" for a Soldier in the management of his educational needs. Essentially, the portal allows: (1) Soldiers to pursue their educational goals from any location around the world, (2) Education Counselors the ability to provide virtual education counseling to a Soldier, and (3) schools with the ability to virtually deliver courses and report Soldier progress to Education Counselors.¹⁶ Although GoArmyEd provides robust education services to the Soldier and management capabilities to Army leadership, the system is extremely costly to operate and maintain. IBM was awarded the current contract in 2007. The contract is a \$200M IDIQ (Indefinite Delivery Indefinite Quantity) type contract with the Army Resources Command.¹⁷ This is a substantial operating expense when compared to the

¹⁵ U.S. Army Department, *GoArmyED: eArmyU*, www.goarmyed.com (accessed January 11, 2011).

¹⁶ *Ibid.*

¹⁷ Solicitation # W74V8H06R0007

other Services; this topic will be further developed in the next chapter. Table III-1 lists non-education related costs associated with the Army’s VolEd program.

Table III-1. Army non-education cost data in millions of dollars.¹⁸

	FY05	FY06	FY07	FY08	FY09	FY10
Government Salaries	\$33.8	\$27.8	\$25.6	\$25.6	\$28.76	\$24.96
Contract Costs	\$1	\$1.2	\$1.4	\$2.5	\$3.29	\$2.53
Non-instructional Contract Costs	\$43.3	\$28.2	\$19.1	\$16.8	\$0	\$0

Overall, the Army’s VolEd Program provides ample continuing education opportunities to Soldiers that are valued by the Service. Noteworthy of these expectations is the requirement for an enlisted Soldier to earn an associate degree or complete an education goal between the fifth and fifteenth year of service and to establish a lifelong learning professional and personal plan by the seventh year of service and/or complete a bachelor’s degree by the twentieth year of service. Clearly, in the Army’s quest to recruit and retain America’s finest, education is an important component to this endeavor.¹⁹

Navy Voluntary Education

The Secretary of the Navy provides policy guidance for both the Navy and Marine Corps Voluntary Education (VolEd) Programs in SECNAVINST 1560.4A. This instruction directs both Services to assist Sailors and Marines in continuing their education in order to “enhance the career potential and personal growth of members, support recruitment, retention and readiness of quality personnel, strengthen job

¹⁸ Data taken from VolEd Fact Sheets.

¹⁹ U.S. Army Department, *Army Continuing Education System*, Instruction (Washington DC: AR 621-5, 2009).

performance, and promote a culture of continuous learning.”²⁰ Both Services are directed to facilitate the pursuit of individual education goals through counseling services, tuition assistance and basic skills training regardless of location or job assignment.

The Chief of Naval Personnel provides overall guidance for the Navy’s VolEd Program in OPNAVINST 1560.9A with more specific guidance provided by the Commander of Naval Education and Training in CNET Notice 1560. Both instructions articulate the overall framework for Navy VolEd Program execution and the purpose for Navy off-duty education. “This program supports long range Navy goals for developing a highly adaptable force; enabling career-long learning; and enhancing personal and professional development, recruitment, and retention.”²¹

The Navy did very little in terms of off-duty voluntary education prior to WWII. The conduct of most off-duty education leading up to WWII was haphazard across some naval stations by individual commanding officers who encouraged Sailors to take advantage of education opportunities outside the Service in their free time. In February 1941, President Roosevelt directed the Navy to join the Army in creating the Joint Army and Navy Committee on Welfare and Recreation which led to the Navy’s first VolEd Program in May 1942 and administered by the Bureau of Naval Personnel. The initial program lacked substance until March 15, 1974, when the Navy formally established their voluntary education program with resources that enabled mission execution. The initial cadre of VolEd employees consisted of 57 professional counselors and 30 clerical

²⁰ U.S. Navy Department, *Department of the Navy Voluntary Education (VOLED) Program*, Instruction (Washington DC: SECNAVINST 1560.4A, December 1, 2005), 1.

²¹ U.S. Navy Department, *Voluntary Education (VOLED) for Navy Sailors*, Instruction (Washington DC: OPNAVINST 1560.9A, March 4, 2008).

support personnel who were all on board by June 1974.²² From this small start, the Navy's VolEd program has grown to an organization that spans the globe with 36 Navy College Offices throughout the world employing 187 education professionals.

The Navy VolEd Program currently receives policy guidance from the Director of Total Force Training and Education Division (N15) from within the Office of the Chief of Naval Personnel (OPNAV). The Center for Personal and Professional Development (CPPD) centrally manages VolEd execution while receiving technical support from the Naval Education and Training Professional Development and Technology Center (NETPDTC). CPPD manages Navy College Offices on major naval installations around the world providing counseling services in support of tuition assistance administration and testing services. Ultimately, each Navy College Office provides Sailors with opportunities to earn college degrees through a variety of options. The program's mission is to "provide continual academic support to Sailors while they pursue a technical or college degree, regardless of their location or duty station."²³ CPPD ensures the consistent provision of educational services through the use of the Navy College Management Information System (NCMIS). NCMIS is an on-line relational data base that facilitates centralized TA processing while supporting counseling services worldwide. NCMIS provides the backbone for the Navy College Website and enables a new feature called MyEducation. Much like GoArmyEd but at a fraction of the cost, MyEducation directly links individual Sailors with Navy College Counseling while allowing for digital administration of tuition assistance from any computer with internet

²² Clinton L. Anderson, "Remembering Those Who Have Made a Difference in United States Military Education."

²³ (Center for Personal and Professional Development 2011)

access. Fully introduced in June, 2010 along with the introduction of a Virtual Education Center, this new offering appears to be a resounding success for Sailors while lowering overall administrative costs for the Navy. Table III-2 lists non-education related costs associated with the Navy’s VolEd program.

Table III-2. Navy non-education cost data in millions of dollars.²⁴

	FY05	FY06	FY07	FY08	FY09	FY10
Government Salaries	-	-	-	\$11.1	\$11.82	\$12.91
Contract Costs	-	-	-	\$3.4	\$3.54	\$3.13
Non-instructional Contract Costs	-	-	-	\$7.1	\$0	\$0

The one program that is unique to the Navy is the Navy College Program for Afloat College Education (NCPACE). Created before the prevalence of internet connectivity aboard ship, the program “provides participating Sailors high quality learning opportunities and experiences from post secondary institutions accredited by an accrediting body recognized by the Department of Education.”²⁵ The primary object of the program is to deliver college courses to sea duty Sailors that are comparable to those available to shore duty Sailors. This program is free to Sailors and the only cost incurred by a Sailor is the textbook; making it a cost-free tuition assistance program from a Sailor’s perspective. Moreover, NCPACE controls and minimizes course costs when compared to courses paid through the Tuition Assistance Program since the program is contracted. The NCPACE program is currently contracted through Central Texas College who are required to deliver accredited college courses either in a classroom setting or in a Distance Learning environment. NCPACE delivers Distance Learning

²⁴ Data taken from VolEd Fact Sheets.

²⁵ U.S. Navy Department, *Center for Personal and Professional Development Navy College Program*, February 1, 2011, www.navycollege.navy.mil (accessed February 1, 2011).

courses through a number of mediums to include CD-ROM, streaming video or through a PDA. NCPACE delivered courses are all from institutions with SOCNAV affiliation so that Sailors can readily transfer credits to complete degrees. Although NCPACE is an impressive program available to Sailors, the prevalence of Distance Learning options available through TA funding make it a redundant funding vehicle for the pursuit of a degree.

Marine Corps Voluntary Education

The Marine Corps Voluntary Education Program falls within the Marine Corps Life Long Learning Program. As mentioned in the previous section, the Secretary of the Navy provides overarching VolEd program guidance. Marine Corps Order 1560.25 sets policy and execution guidance for the Marine Corps. The Lifelong Learning Program comprises all VolEd components required by DoD plus the integration of the Corps' library program reflecting Service heritage. The overall program is funded through non-appropriated funding unlike the other Services. This philosophy led to the recent funding transformation of VolEd staff positions in FY11 from Government Service (GS) (appropriated funding) to Morale, Welfare, and Recreation (non-appropriated).

The beginnings of Marine Corps voluntary education trace back to 1839 in the Marine Barracks of Washington DC. Seeing the need to provide formalized education to Marines, the Barracks Commandant established a school for general education for band apprentices; the most famous graduate was John Philip Sousa. This school was a start, but not the catalyst for the growth of voluntary education within the Corps. The true sponsor for voluntary education growth in the Marine Corps is attributed to Major General John A. Lejeune. On November 21, 1919, General Lejeune issued an order to Marines at

Quantico Marine Base to participate in educational, athletic or entertainment opportunities in order to build and restore morale of Marines who were returning from Europe following WWI. “The LEATHERNECK headline was: PLAY OR GO TO SCHOOL EVERY AFTERNOON IS NEW PROGRAM HERE.”²⁶ Ultimately, his hope was to enhance the standards of a Marine thereby providing a better soldier/citizen for the country.

The influence of education continued to expand through the years and incorporated the library program in the early 1920’s. Today, Marines are provided access to off-duty and voluntary educational services on Marine bases that embody the original intent of General Lejeune’s program.

The mission of the Lifelong Learning program is to provide personal and professional development learning opportunities to the Marine Corps community. The LL program positively impacts the recruitment, retention, and readiness of active duty Marines and provides Commanders a valuable tool to prevent obstacles that may detract from unit readiness. LL program opportunities shall be available to Marines regardless of duty station.²⁷

Base Commanders are required to provide these Lifelong Learning opportunities in on-base education centers typically headed by a civilian Education Services Officer. The Base Commander provides Program funding with the exception of TA and library services. For TA, the Deputy Commander for Manpower and Reserve Affairs provides funding authority control through NETPDTC and managed via NCMIS. Due to this arrangement overall program costs are significantly reduced by sharing services with the Navy. Other services that are shared with the Navy include the Sailor/Marine American

²⁶ Anderson, “Remembering Those Who Have Made a Difference in United States Military Education,” 39.

²⁷ U.S. Navy Department, *Marine Corps Lifelong Learning Program*, Instruction (Washington DC: MCO 1560.25, September 1, 2010), 2.

Council on Registry Transcript (SMART), and the United Services Apprenticeship Program. Table III-3 lists non-education related costs associated with the Marine Corps' VolEd program.

Table III-3. USMC non-education cost data in millions of dollars.²⁸

	FY05	FY06	FY07	FY08	FY09	FY10
Government Salaries	\$2.3	\$2.5	\$2.7	\$3.0	\$3.08	\$2.62
Contract Costs	\$.4	\$.4	\$.4	\$.4	\$.4	\$0
Non-instructional Contract Costs	\$2.6	\$2.7	\$3.6	\$7.2	\$0	\$0

General Lejeune would be proud to see the way in which his original initiative has grown throughout the Marine Corps. The Marine Corps Lifelong Learning program fulfills DoD policies while placing emphasis on the educational needs of today's Marine.

Air Force Voluntary Education

The Air Force Voluntary Education Program (VolEd) executes DoD VolEd policy guidance under provisions stipulated in DoD instructions and under Title 10 of the U.S. Code. The Air Force VolEd Program fundamentally provides education counseling services, Tuition Assistance management, testing services and the delivery of basic skills training for those airmen in need. “The Voluntary Education Program supports Air Force Development by maintaining a highly educated work force” while supporting recruiting and retention efforts as an in-service benefit.²⁹ As stated in the Air Force VolEd mission statement, the Service values off-duty education. “The mission of the Air Force Voluntary Education Program is to provide and fund educational opportunities and

²⁸ Data taken from VolEd Fact Sheets.

²⁹ U.S. Air Force Department, *Voluntary Education Program*, Instruction (Washington DC: AFI 36-2306, August 13, 2010), 5.

services that enhance professional and personal development during an Airman's career. The Air Force uses this program for recruitment and retention as well as readiness."³⁰

The Air Force became a separate Service on July 26, 1947 and operated much like the Army for the next several years. Over time, Air Force education programs evolved into separate and distinct programs from those of the other Services into what is seen today. The technical needs of the Air Force are articulated through Service competencies which are supported through off-duty education. The VolEd Program is currently managed in a somewhat centralized fashion where many execution responsibilities are dispersed. The Chief of Air Force VolEd operates from within Headquarters Air Force and is responsible for policy oversight. Execution management is distributed amongst Air Force Major Commands with day to day operations delegated to the base Education and Training Section Chief thereby allowing each base to be responsive to the needs of the resident Airman population. To link policy, execution, and the servicemember together, the Air Force operates its program through the Air Force Automated Education Management System (AFEMS) available through the Air Force Education Portal. AFEMS allows for consistent execution of tuition assistance and counseling services throughout the Air Force while allowing Airmen access to their individual education program from any location throughout the world. Services provided through AFEMS are contracted through BAM Technologies. Table III-4 lists non-education related costs associated with the VolEd program for the Air Force.

³⁰ Ibid.

Table III-4. Air Force non-education cost data in millions of dollars.³¹

	FY05	FY06	FY07	FY08	FY09	FY10
Government Salaries	\$24.2	\$23.2	\$22.6	\$23.8	\$24.88	\$22.47
Contract Salaries	\$.1	\$0	\$0	\$0	\$0	\$0
Non-instructional Contract Costs	\$6.6	\$6.8	\$5.2	\$9.1	\$9.26	\$6.7

One unique aspect of the Air Force VolEd Program is the Community College of the Air Force (CCAF). CCAF is one of 14 federally chartered degree-granting institutions that service the enlisted force. The college is a two year institution that is authorized to grant associate degrees in applied sciences upon completion of a program designed for enlisted specialties within the Air Force. CCAF is the only program of its kind within DoD and is the largest multi-campus community college in the world. The program began in the early 1970s and granted its first degree in April 1977. The program is a tremendous success considering the number of degrees that have been granted over the years. As of April 2009, 335,440 associate degrees have been granted since its inception; the CCAF has significantly contributed in making the Air Force the most educated force relative to its mission.³²

Fiscal Year	Enlisted Forces	AA Degrees Granted	Percentage of Force
FY05	276,118	20,858	7.55%
FY06	273,990	20,352	7.43%
FY07	263,372	20,851	7.92%
FY08	258,095	20,452	7.92%
FY09	263,351	22,740	8.63%

Figure III-1. Air Force Associate Degree data.³³

³¹ Data taken from VolEd Fact Sheets.

³² U.S. Air Force Department, *Air University*, www.au.af.mil/au/ (accessed November 27, 2010).

³³ Data derived from DoD Education Fact Sheets and Appendix A.

Summary

This chapter provided background information for in-service voluntary education programs offered by the military services within DoD under the auspices of Title 10. DoD sets VolEd program policy for the Services, and the Services provide access to educational counseling services, tuition assistance and Basic Skills training while facilitating testing services under the purview of DANTES. Additionally, each Service has unique aspects for VolEd execution that reflect the needs of a particular Service. Noteworthy of these Service unique aspects is the use of web-enabled education services and the variance in cost as compared to services rendered. And finally, each Service states that it values the educational development of their workforce. In summation, key points from this chapter that will be revisited in this paper are:

- Title 10 provides funding authority to DoD for off-duty voluntary tuition assistance as a benefit to the servicemember (discretionary funding).
- All Services consider education as a recruiting and retention tool.
- DANTES reduces redundancy in some educational services thereby lowering overall cost to DoD.

Although the Goldwater-Nichols Reorganization Act of 1986 did not specifically address the Voluntary Education Program, the Act impacted VolEd as a second order effect. The author is aware that a DoD Voluntary Education Joint Initiative established a Joint Service VolEd Committee in September, 2005 under the direction of OSD.³⁴ The committee's charter was to review multi-Service education programs and services, to

³⁴ The author was the Commanding Officer of the Navy's Center for Personal and Professional Development from October, 2007 to July, 2010.

identify cost savings and efficiencies, and to recommend joint and multi-Service education services and centers of excellence for future implementation. OSD directed the committee to focus on resource optimization to include consolidation of memorandums of understanding, contracts, facilities, and human capital due to the fiscal environment and future posture of the military. Despite the many recommendations the committee proposed, very few were ever implemented to curb education costs and improve “jointness” amongst the Services due to a lack of granted authorities. The only initiative that moved forward from the committee’s many recommendations, that is applicable to this paper, was the creation of the Online Academic Skills Courses (OASC). It is disappointing to note that despite the lack of authorities granted to the committee in order to implement their findings, the Services have not consolidated base education centers and IT portal services of their own accord.

IV. DATA PRESENTATION AND ANALYSIS OF TUITION ASSISTANCE PROGRAMS

Introduction

This paper has examined the underpinnings of educational entitlements and benefits provided to servicemembers through the various forms of the G.I. Bill and the VolEd Program. Each has evolved separately in providing a benefit to servicemembers so that they can contribute to the U.S. as either citizen or soldier. It is apparent that both programs serve in furthering the objectives of the U.S. National Security Strategy to varying degrees, but are there more effective methods to execute these programs in a fiscally constrained environment?

This chapter provides information to the reader that contributes to the understanding of the scope and magnitude of the G.I. Bill and DoD voluntary education programs. The data presented in this chapter is limited to publically available sources. Therefore, the author is artificially limited on the number of viable options that are presented for consideration. Focus is placed on developing an understanding of the influences of education on recruiting and retention, the scope of the Tuition Assistance Program, and applicable portions of the G.I. Bill.

Recruiting and Retention

The transition to an all voluntary military force brought many challenges in recruiting candidates for military service and retaining servicemembers for continued service that remain today. Title 10 of U.S. Code provides authority to DoD to carry out an enlistment incentive program for the purposes of enlisting individuals into the

military. There are a myriad of methods and enticements that each Service employs to recruit future military members, and the promise of a free education is a key feature of the overall recruiting package. In addition, DoD expends millions of dollars each year in developing technical skills that enable each Service to contribute to the maintenance of security for the U.S. as demanded by the Constitution and the National Security Strategy. It only makes sense that retaining individuals for longer periods of time reduces individual skill training costs while enabling Services to be more effective since a more seasoned force can fulfill greater roles of responsibility over a career. In a sense, an apprentice culture exists within the military and increased education and training allow the organization to be more effective. So, is education, and more specifically tuition assistance, an effective tool to recruit and retain members of the Armed Forces? This section reviews studies that examine, among other things, the effectiveness of tuition assistance to retain individuals in the military.

“Effectiveness of the Voluntary Education Program,” Center for Naval Analyses (Garcia et al., 1998)

The Center for Naval Analyses (CNA) conducted a study of the Navy’s overall VolEd Program to determine the impact on promotion, retention, and the effectiveness of the program, and was the first major study of this kind. Through statistical analysis, CNA examined four basic education programs for active duty Sailors from August 1992 through March 1997: tuition assistance, the Program for Afloat College Education (PACE), Academic Skills, and the education centers themselves. This study incorporated a review of 510,000 records of individual students and courses.

The study found that in the area of promotion that VolEd improves promotion prospects. The probability of Sailors with no college education advancing to E5 within 5 years is 31%; with 15 college credits the probability increases to 43%; and with 60 college credits the probability increases to 66%. Figure IV-1 depicts the effect of VolEd participation on promotion.

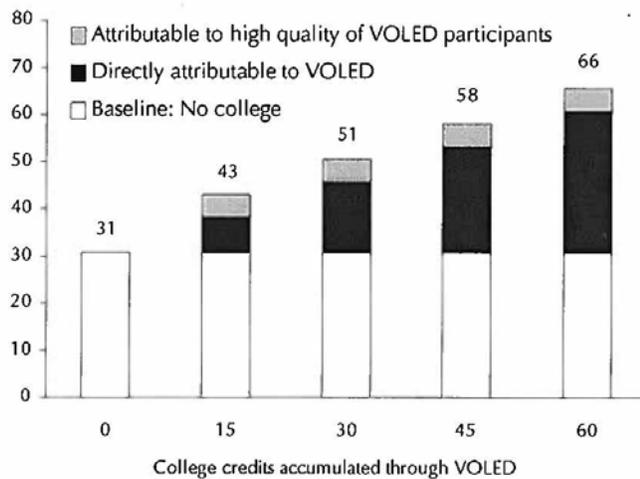


Figure IV-1. VolEd participation effect on promotion.¹

This study also found that during the period of the analysis that a college education administered through Navy VolEd positively impacted retention. Enlisted first term Sailors reenlisted at the following rates: 31% with no college education; 37% with 15 college credits; 55% with 60 college credits. Figure IV-2 depicts the impact of education on retention.

¹ Ernest H. Joy with David L. Reese Federico E. Garcia, *Effectiveness of the Voluntary Education Program*, Research Study (Alexandria: Center for Naval Analyses, 1998), 27.

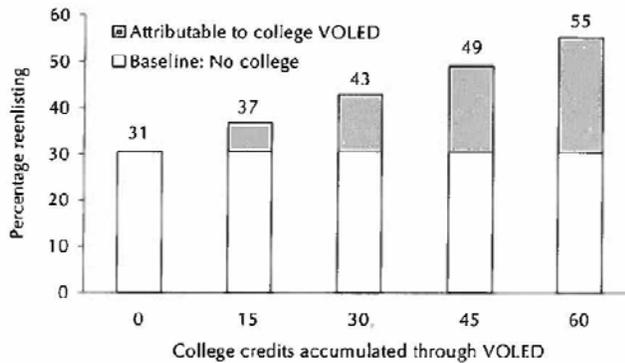


Figure IV-2. VolEd impact on Navy retention.²

In their final analysis, the study reported that the Navy receives \$2 of improved retention for every dollar invested in tuition assistance plus the cost avoidance from eliminating the training costs associated with new Sailor development.

“Tuition Assistance Usage and First-term Military Retention,” RAND (Buddin and Kapur, 2002)

RAND’s National Defense Research Group was contracted by OSD to research TA’s impact on first-term retention in the Navy and Marine Corps. This report immediately found fault with the 1998 CNA study for a number of reasons: (1) the study failed to separate the individual impact of TA, PACE, and Academic Learning on retention, (2) their approach was problematic since servicemembers had unequal access to TA, and (3) that counseling sessions influenced TA usage. RAND’s report attempted to focus on factors contributing to TA participation and the effect of TA on first-term retention.

The findings of this RAND report were contrary to the findings found in the aforementioned CNA report. The first major finding concerned demographic and service

² Richard Buddin and Kanika Kapur, *Tuition Assistance Usage and First-Term Military Retention*, Study, National Defense Research Institute (Santa Monica: RAND, 2002), 32.

factors. RAND claimed that “TA usage was higher for women and minorities than other members” and that “age and education level had little effect on TA usage.”³

Additionally, “TA usage was higher for skilled technical and support and administrative jobs than other occupations.”⁴ Moreover, servicemembers who were stationed overseas were more likely to take advantage of TA benefits.

The most significant difference in the RAND report was that TA usage had an inverse impact on retention. In the Department of the Navy, RAND found that TA users remained in the Navy 8.9 percentage points lower than non-users and 4.4 percentage points lower than non-users for Marines. Figure IV-3 depicts the overall retention differences. In their final analysis, the study’s authors reported that Marines and Sailors use TA programs to prepare for post-service jobs and that education is an enlistment incentive.

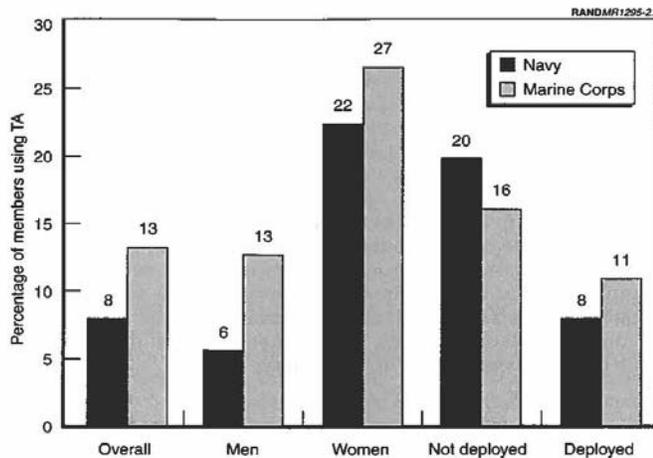


Figure IV-3. TA usage patterns by gender and deployment status.⁵

³ Ibid.

⁴ Ibid.

⁵ Ibid., 25.

“Impact of the Army Continuing Education System (ACES) on Soldier Retention and Performance: Data Analyses,” U.S. Army Research Institute for Behavioral and Social Sciences (2003)

The Army Continuing Education System (ACES) study is the first and most thorough study conducted to evaluate TA and FAST participation effects on reenlistment, attrition and promotion of Soldiers within the Army. In ACES’ mission to promote lifelong learning, this analysis includes the evaluation of performance ratings provided by supervisors and the overall effect of education on promotion. Overall, all findings in the ACES study favorably reported on the effectiveness of the program.

This study uniformly found that the effects of TA participation on reenlistment were positive and that participation in ACES programs had a positive effect on performance and promotion. Specifically:

- The likelihood of a Soldier to reenlist was 7 percentage points greater during the first term of enlistment.
- Participation in the TA program decreases the attrition rates of Soldiers during their first term of enlistment.
- TA participation of Non Commissioned Officers (NCOs) had a positive correlation to increased promotion points.
- Performance ratings were higher for NCOs who had completed more semester hours.

- TA had an associated effect on earlier promotion to E6.⁶

Ultimately, this study supports both the mission of ACES and, that participation in voluntary education is a significant factor of unit readiness. In other words, one conclusion that can be drawn from this study is that voluntary education supports the NSS in more than just the promotion of education (see Appendix C).

Naval Postgraduate Studies

Students at the Naval Postgraduate School (NPS) have conducted recent statistical studies that pertain to a number of effects that TA has on the Navy. Specifically, the preponderance of each study examined: (1) the impact of VolEd on a Sailor's career, i.e. retention and promotion, (2) the return on the Navy's investment (ROI) in TA, and (3) job performance. Over the last several years the Navy has experienced a growing tension between operational needs and force development needs due to budget pressures, and these studies attempt to capture the value of continued investments in voluntary education programs and tuition assistance. The three studies reviewed for this paper are Hart (2007), Barnard and Zardeskas (2007), and McLaughlin (2010). Each paper found similar results although each left several unanswered questions.

Hart's study was predominantly a literature review of past studies and examined the differences in research design and methodology to obtain results. The studies he reviewed were the CNA, RAND and ACES reports previously mentioned in this chapter. Hart points out that because of the differences in research design that the CNA and RAND

⁶ Timothy A. Dall, Kristina Handy, Javier Espinosa, and Mark C. Young Paul J. Sticha, *Impact of the Army Continuing Education System (ACES) on Soldier Retention and Performance: Data Analyses*, Study (Alexandria: United States Army Research Institute for the Behavioral and Social Sciences, 2003). viii.

reports found opposite findings concerning the effects of TA on retention while the ACES report only found a slight positive influence from the use of TA on the retention of Soldiers. The one point that was consistent in all three studies was that women and minorities used VolEd programs and TA at higher rates within each study group. One noteworthy piece of Hart's study is his attempt at explaining the generational impact. He concludes that understanding the demographic consistencies between the three reviewed studies and the generational shift that the Navy has experienced this past decade can explain retention and promotion trends, and help focus the Service for future education strategies. Ultimately, Hart found that his research was inconclusive in all focus areas: (1) the impact on retention is debatable since servicemembers who participate in VolEd programs are self selecting and therefore motivated to excel; (2) that ROI to the Navy is not clear and that the program may not pay for itself; and (3) that VolEd is a fringe benefit sought after by Sailors.⁷

The Barnard and Zardeskas study also included a thorough literature review; however, the authors provided their own quantitative analysis on the effects of voluntary education on Sailor first-term retention and promotion. Additionally, this study attempted to assess the value of voluntary education through results from the Education Quick Poll conducted by Navy, Personnel Research, Studies, and Technology (NPRST) which was sponsored by the Center for Personal and Professional Development. The incorporation of the Education Quick Poll is an important new twist to understanding TA effects because it provides insight into the beliefs of a Sailor on the importance of educational development in the Service. In other words, what do Sailors value? Barnard and

⁷ Brian M. Hart, *An Analysis of the Navy's Voluntary Education*, Master's Thesis (Monterey: Naval Postgraduate School, 2007), 95-99.

Zardeskas' analysis confirmed the positive relationship of retention and educational opportunities provided through the VolEd program. Their analyses found that "Sailors who use TA for college reenlist at higher rates than those who do not" and that "the mean reenlistment rate for the sample is 39.1 percent, but among those who use TA it is 54.6 percent."⁸ Additionally, Barnard and Zardeskas were unable to reproduce the results of the RAND study from their statistical pool. And finally, they were unable to provide conclusive evidence that the TA program is cost effective.

The McLaughlin study builds on the earlier research conducted at the Naval Postgraduate School through new quantitative analysis of more current data while studying the impact of education delivery methods. McLaughlin's findings that are pertinent to this paper are: (1) TA has a large impact on Sailors promoting from E3 to E4 and that the effect tapers off with seniority, and (2) TA has a positive effect on reenlistment. McLaughlin found that Sailors enrolled in a TA program in their first term reenlisted at a 27.8 percent higher rate than those not enrolled in a TA program. And, those Sailors receiving a passing grade in at least one class promoted 13.9 percent points higher in the overall TA participation pool.⁹ This could suggest that personnel who fail to pass a course are similar to those who never participate in the TA program, meaning that future studies should focus on success rates and not participation rates.

⁸ Douglas L. Barnard and Elizabeth F. Zardeskas, *Voluntary Education of Enlisted Servicemembers: An Analysis of Program Effects on Retention and other Outcome Measures*, Master's Thesis (Monterey: Naval Postgraduate School, 2007), 89.

⁹ Jeremy P. McLaughlin, *A Statistical Analysis of the Effect of the Navy's Tuition Assistance Program: Do Distance Learning Classes Make a Difference?*, Master's Thesis (Monterey: Naval Postgraduate School, 2010), 47.

“The Impact of the Navy’s Tuition Assistance Program on the Retention and Promotion of First-term Sailors,” Mehay and Pema (2008)

Unlike the aforementioned Naval Postgraduate School studies which represented a body of student research, NPS sponsored this research paper to continue analyses of the effect of TA on retention and promotion within the Navy. The continued large monetary investment in this force development program keeps TA and the VolEd program under close scrutiny in light of the need to balance operational requirements within a shrinking budget. Of note, Mehay and Pema acknowledge that there is tremendous difficulty in establishing reliable causal effects on Sailors behavior which is demonstrated in the divergence of results from previous studies.¹⁰

The analysis conducted in this study incorporated a larger study group than past studies and includes multiple cohorts. As a result, this study represents a more current evaluation of education programs in real terms. Through their analysis they have attempted to eliminate the problems that were found in earlier studies.

Like the ACES study, Mehay and Pema uniformly found positive effects from TA participation on reenlistment, and performance and promotion. They concluded that:

- The reenlistment rates of Sailors who use TA were approximately 20 percent points greater than non users.
- Women participate in the TA program 18 percentage points greater than their male counterparts.

¹⁰ Stephen Mehay & Elda Pema, *The Impact of the Navy's Tuition Assistance Program on the Retention and Promotion of First-term Sailors*, Sponsored report (Monterey: Naval Postgraduate School, 2008), vii.

- Women TA users are less likely to reenlist than men, but will reenlist at a greater rate than women who are non TA users.
- African Americans who use TA are more likely to reenlist than white TA users by 13.6 percentage points.
- Cost effectiveness of the TA program is debatable. Depending on the bounds of the problem, the Navy saves between \$66M and \$157M annually meaning that when compared to the current year expenditure of \$86.6M this program may or may not be cost effective. However, attitudes of Sailors taken from Education Quick Polls allude to the fact that there is a commensurate effect of reenlistment rates and the potential for education benefits.¹¹

In summation, this study confirms a positive correlation between voluntary education participation and the posed study questions. TA positively influences recruitment and retention, promotes increased advancement opportunities and may be cost effective when comparing it to other recruitment and reenlistment programs.

Surveys

In order to obtain a more complete understanding of factors that influence recruiting and retention that pertain to education, it is necessary to gather and interpret attitude and opinion data. Data of this type is typically collected through scientifically designed surveys. Within DoD, the Navy is the only Service that has routinely collected data on its workforce in order to understand the effectiveness of policy. In the context of this paper there are two surveys that provide pertinent information: (1) the ARGUS Survey,

¹¹ Ibid., 41.

sponsored by Navy Personnel Command, and (2) the Education Quick Poll, sponsored by the Center for Personal and Professional Development.

ARGUS is a retention analysis tool that is designed for Sailors to express their opinions when reaching career milestone events such as reenlistment, advancement, transfers or re-designations. Data is gathered by retention zones and fall into one of three categories: Zone A, 0 – 6 years of service; Zone B, 6 – 10 years of service; and Zone C, 10 -14 years of service. The survey is a voluntary web-based questionnaire that gathers Sailors' perceptions on quality-of-life issues such as the Navy's services, leadership, and job satisfaction. Sailors indicate how each area influences their decisions on whether to stay in or leave the Navy. Feedback is confidential and senior Navy leadership are provided the results to assess the impact of policies and focus available resources to areas about which Sailors are the most concerned. The last ARGUS survey conducted (2009) found that education benefits ranked number three or four depending on retention zone and remained consistent with past ARGUS surveys suggesting the value of educational benefits to a Sailor.¹² It is also reasonable to suggest that education benefits are likewise important to the members of the other Services due to the size of the pool of respondents, although additional research is required to validate this assumption.

The second survey tool that provides valuable information on attitudes and opinions is the Education Quick Poll, conducted by Navy Personnel, Research, Studies, and Technology (NPRST) and sponsored by the Center for Personal and Professional Development. NPRST's mission for the Navy is to provide tools, data, methods, and

¹² Data taken from 2009 ARGUS Survey

forecasts that are necessary to anticipate and manage change, to provide a means to understand what servicemembers think and feel, how policies and practices affect them, while predicting changes in satisfaction and continuation behavior. The Navy Quick Poll is the Navy's scientifically valid, Fleet-wide "quick pulse" of the Navy on personnel-related issues and in this case, education. The Education Quick Poll measures current educational levels within the Fleet, Sailors' views on education and education related issues, and to understand issues and barriers in obtaining a college degree while in the Service.

The following series of charts represent salient portions of the 2009 Education Quick Poll and assist in understanding current prevailing attitudes within the Navy. Figure IV-4 provides the dispersion of college attendees. Figure IV-5 provides an insight into how Sailors view the support they receive from their respective commands. Figure IV-6 provides the value of education to a Sailor. Figure IV-7 provides a view of retention attitudes. Figure IV-8 is a snapshot of career intentions at the time the survey was taken. Figure IV-9 provides 9/11 GI Bill usage intentions. And Figure IV-10 provides the factor of the 9/11 G.I. Bill in retaining Sailors.

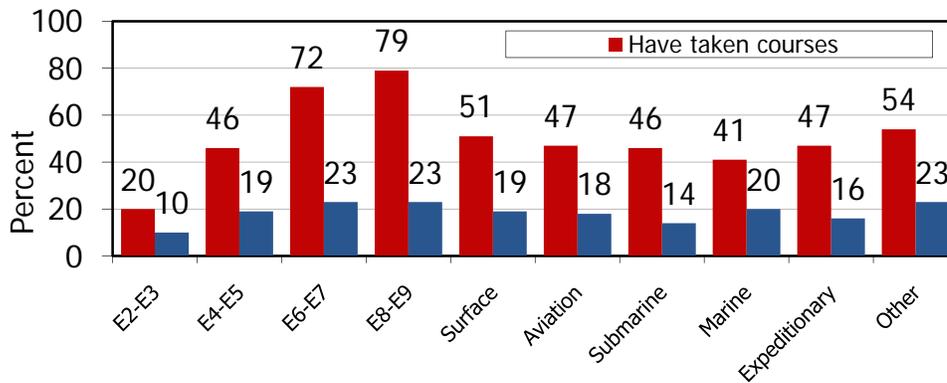


Figure IV-4. College attendance while in the Navy (enlisted).¹³

	Percent "To a very great extent"/"To a great extent"*		
	Encouraged by CoC to obtain degree	CoC supports me in achieving educational goals	Supervisor supports me in achieving educational goals
E2-E3	51	49	53
E4-E5	50	48	53
E6-E7	61	64	67
E8-E9	62	75	77
Surface	54	53	58
Aviation	54	54	57
Submarine	55	48	57
Marine	66	57	59
Expeditionary	54	56	60
Other	52	57	59

Figure IV-5. Chain of command support.

	Percent "To a very great extent"/"To a great extent"*	
	College benefits me personally	College benefits me professionally
E2-E-3	88	89
E4-E-5	85	84
E6-E-7	84	78
E8-E-9	86	76
Surface	85	83
Aviation	85	83
Submarine	85	78
Marine	87	79
Expeditionary	80	79
Other	85	87

Figure IV-6. College benefits.

¹³ Geoffrey Patrissi, Zannette Uriell, Carol Newell, Kimberly Whittam, Donna Conway. 2008 *Enlisted Quick Poll*. Survey, Millington: Navy Personnel Research, Studies, and Technology, 2008. Applies to Figures 5 – 11.

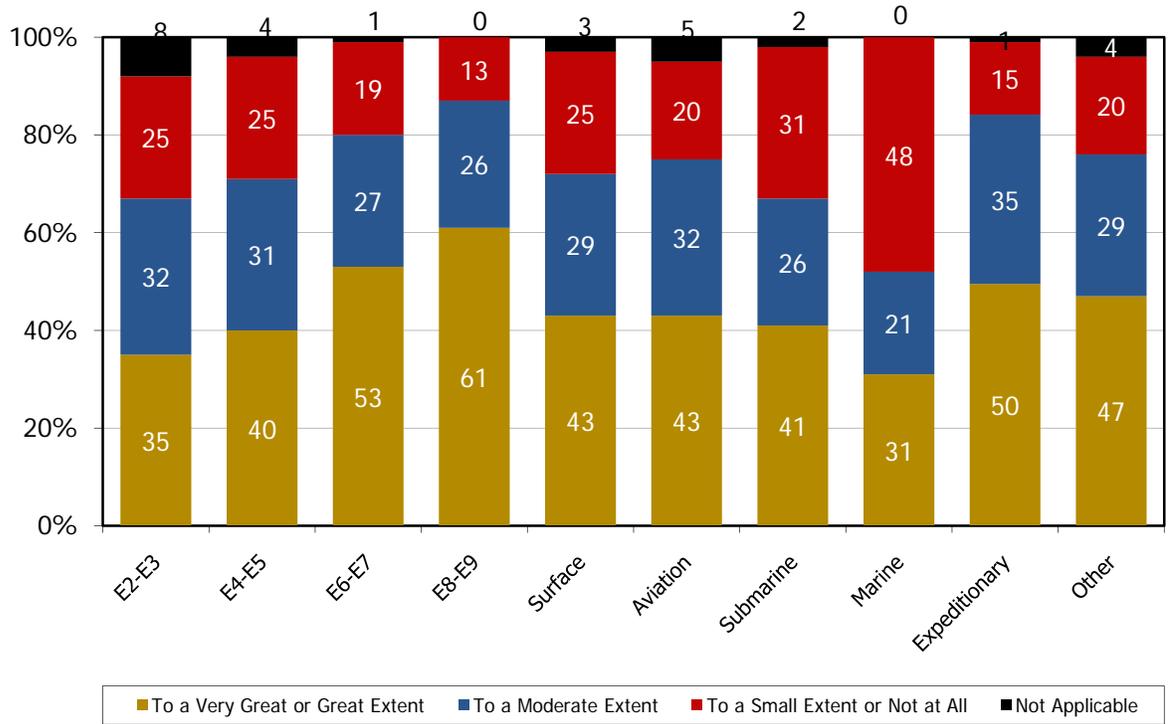


Figure IV-7. Navy's educational policies and programs encourage Sailors to "Stay Navy."

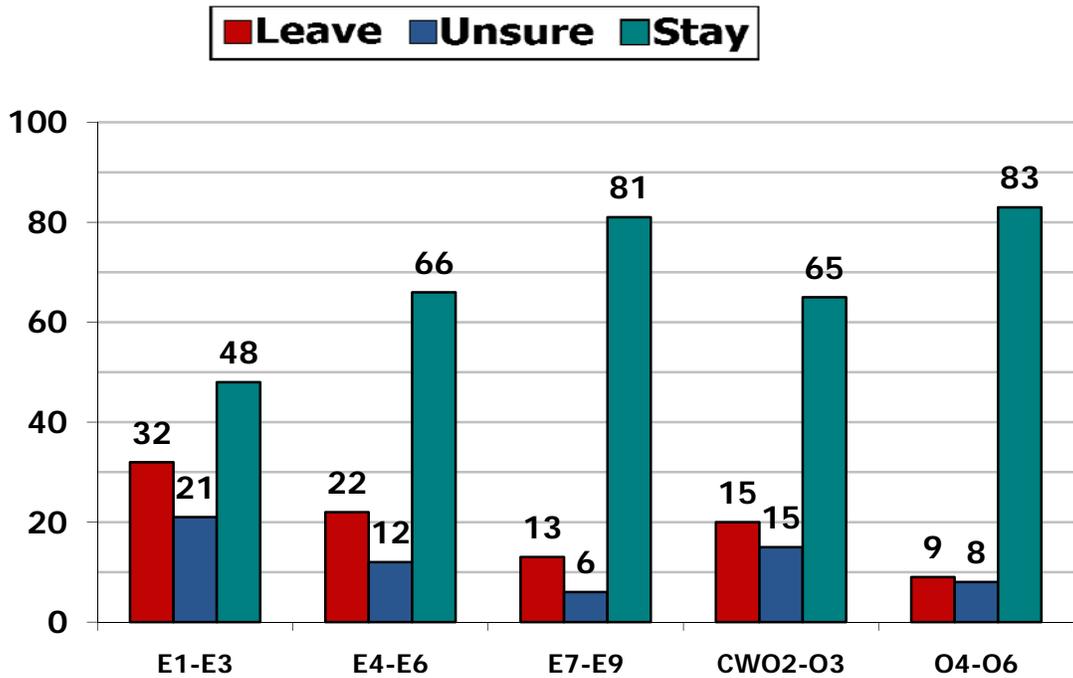


Figure IV-8. Career intentions.

**Suppose you were eligible to use this benefit.
When would you use this benefit?**

		At my earliest opportunity	When I retire or separate	Not sure	N/A
Enlisted	Stay	8%	69%	21%	3%
	Unsure	26%	50%	23%	2%
	Leave	51%	39%	8%	2%
Officers	Stay	2%	60%	23%	16%
	Unsure	7%	57%	23%	13%
	Leave	19%	51%	17%	13%

Figure IV-9. Post-9/11 G.I. Bill: plans to use by retention intention.

**How likely would you be to sign up for 4 additional years to pass
this benefit on to your family member?**

		Likely	Neither	Unlikely	N/A
Enlisted	Stay	68%	16%	10%	6%
	Unsure	33%	38%	24%	5%
	Leave	19%	11%	59%	11%
Officers	Stay	52%	16%	11%	20%
	Unsure	37%	20%	27%	16%
	Leave	15%	17%	45%	24%

Figure IV-10. Post-9/11 G.I. Bill: transferring benefit by retention intention.

One interpretation from this series of figures is that: (1) Sailors value education; (2) approximately 20 percent of the force is involved in off-duty education; (3) career intentions are consistent with Service retention goals; (4) the number of Sailors that intend to use the 9/11 G.I. Bill are consistent with Service attrition goals, and (5) a large percentage of Sailors will “Stay Navy” in order to pass 9/11 G.I. Bill benefits (an entitlement) onto family members. Moreover, educational benefits are perceived by servicemembers as an entitlement regardless of funding source. Coupling this

information with the statistical information presented earlier in this section, it is reasonably safe to positively link educational benefits with recruitment and retention.

Tuition Assistance

Thus far we have examined influencers of the Tuition Assistance Program and how the program influences servicemembers. In one sense, TA is influenced by the force while also influencing the force. The TA Program is central in DoD's ability to provide financial aid to servicemembers to off-set the cost of education while enhancing unit readiness. The focus of this section is on current TA programmatic data to shape further discussion on available options to DoD so that the program is better aligned with NSS objectives (Appendix C) while also streamlining costs.

The Tuition Assistance Program is the single largest voluntary education program available to active duty servicemembers. Title 10 of U.S. Code, Section 2007, provides TA Program authority to DoD. DoD Instruction 1322.25 implements guidance for VolEd Programs and establishes policy for the TA Program. OSD Memorandum of November 26, 2001 establishes uniform funding policy across the Services.¹⁴ This policy allows each Service to pay up to 100 percent of education costs for servicemembers with a cap of \$250 per semester hour up to a ceiling of \$4,500 per fiscal year. Courses and degree programs that qualify for TA funding may be academic or technical and can be taken from two- or four-year institutions on an installation, in the civilian community, or by correspondence. TA funding is also authorized to help servicemembers complete a high school diploma, if needed, or for certificate programs. Additionally, TA funding for

¹⁴ U.S. Department of Defense. *Uniform Tuition Assistance Policy*. Washington DC: OSD Memorandum, November 26, 2001.

foreign language study is authorized per OSD Memorandum of December 12, 2006.¹⁵ TA is not authorized however, for courses that lead to a lateral or lower level degree than that already in the possession of the servicemember. Moreover, TA is not authorized for books. Finally, students are required to reimburse the government for TA course expenditures if a “C” average is not maintained.

Funding level policies are consistent across the Services with the exception of the Navy. The Navy currently funds TA to DoD caps, but does not fund TA to the FY ceiling of \$4,500; Navy places its FY funding cap at 16 semester hours equating to \$4,000. TA expenditures have consistently grown this decade as seen in Figure IV-11 reaching a total DoD expenditure of approximately \$541.7 million.¹⁶ The implementation of new Service policies to manage uncontrolled escalating expenditures explains FY TA dips in expenditures. One example is seen in the decrease for Navy expenditures in 2008. In this case, Navy enacted specific TA guidance in NAVADMIN 042/08 of 12 February 08 that required Sailors to have a formal education plan in place by the time they completed 5 courses. This policy essentially removed education dabblers from the pool of TA users who continued to take courses without ever attaining a degree. Overall, TA has grown exponentially over the past decade and is causing great consternation for the Services in lieu of pressurized budgets. Can this upward trend be sustained?

¹⁵ U.S. Department of Defense. *Uniform Tuition Assistance Policy: Foreign Language Proficiency*. Washington DC: OSD Memorandum, December 12, 2006.

¹⁶ Data taken from DOD FY10 Education Fact Sheet.

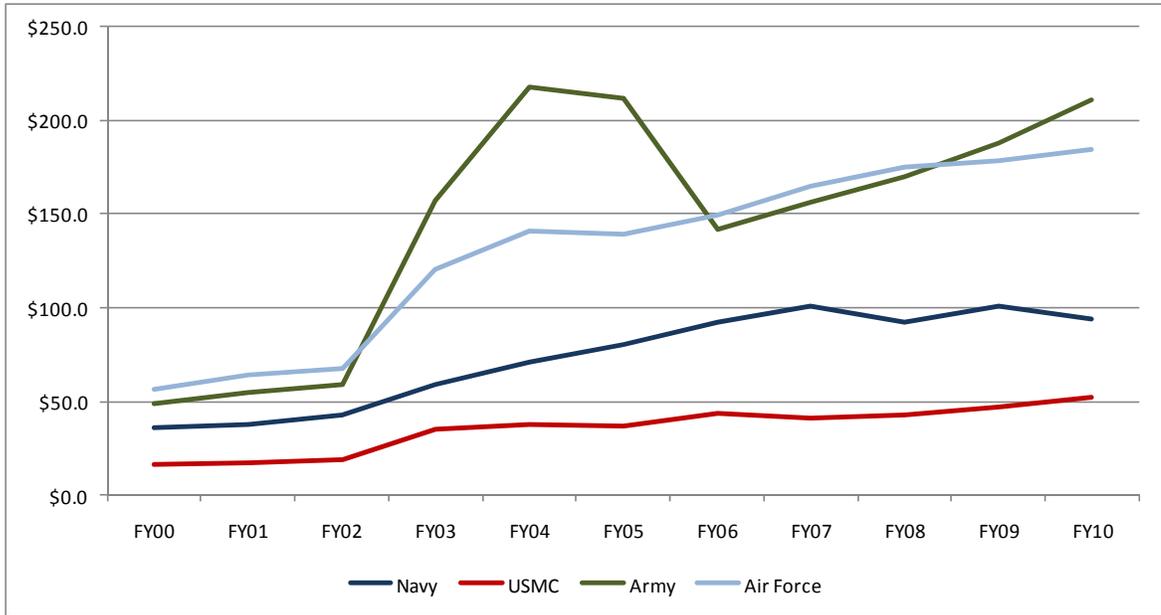


Figure IV-11. TA expenditures in millions of dollars.¹⁷

Despite minor differences in Service funding policies, TA execution per servicemember is relatively consistent as depicted in Table IV-1 and Table IV-2. Courses per servicemember are approximately 2.5 courses per fiscal year; and servicemember average spending is under \$2,000 per fiscal year, well below the DoD ceiling of \$4,500. Future TA policy modifications must consider this critical element of overall TA execution if funding strategies are going to be sustainable in a constrained fiscal environment.

¹⁷ Data taken from DoD Education Fact Sheets.

Table IV-1. Servicemember average courses per year.¹⁸

	Navy	USMC	Army	Air Force
<i>FY05</i>	2.49	2.83	2.35	3.53
<i>FY06</i>	2.69	2.79	1.42	3.50
<i>FY07</i>	2.75	2.84	2.13	3.46
<i>FY08</i>	2.80	2.79	2.14	3.23
<i>FY09</i>	2.84	2.74	2.36	3.36
<i>FY10</i>	2.80	2.77	2.44	3.21

Table IV-2. Average TA expenditure per servicemember.¹⁹

	Navy	USMC	Army	Air Force
<i>FY05</i>	\$1,339	\$1,527	\$1,948	\$1,756
<i>FY06</i>	\$1,498	\$1,701	\$848	\$1,950
<i>FY07</i>	\$1,668	\$1,680	\$1,343	\$2,063
<i>FY08</i>	\$1,737	\$1,742	\$1,325	\$2,083
<i>FY09</i>	\$1,789	\$1,763	\$1,487	\$2,138
<i>FY10</i>	\$1,811	\$1,861	\$1,410	\$2,170

Return on investment (ROI) is a recurring topic of discussion for each military Service during yearly budget cycles. Table IV-3 through Table IV-7 provide one aspect on ROI as it pertains to degrees or certificates completed per fiscal year using TA as the funding mechanism. It is readily apparent from this data that there is a disparity in the ability of servicemembers to complete a degree between the Services. The ability of Air Force personnel to complete a degree as compared to the other Services is striking. Of note, Airmen earn Associate degrees at almost 10 times the rate over the Navy and 40 times the rate over the Marine Corps. This can be taken as a clear indication that: (1) CCAF is a highly effective vehicle for the Air Force to educate their entire enlisted force; (2) CCAF is more effective than SOCAD, SOCNAV, or SOCMAR; and (3) the ability of

¹⁸ Data derived from DoD Education Fact Sheets

¹⁹ Ibid.

the Air Force to ensure degree completion is superior to that of the other Services which can be attributed to execution tools, i.e. education portals.

Table IV-3. Associate Degrees earned through VolEd (reported).²⁰

	Navy	USMC	Army	Air Force
<i>FY08</i>	4,729	470	1,296	20,452
<i>FY09</i>	4,466	601	1,469	22,740
<i>FY10</i>	3,853	503	1,592	23,501

Table IV-4. Bachelor Degrees earned through VolEd (reported).²¹

	Navy	USMC	Army	Air Force
<i>FY08</i>	4,262	470	1,360	5,113
<i>FY09</i>	3,357	1,196	1,591	5,035
<i>FY10</i>	3,311	1,038	1,880	4,112

Table IV-5. Masters Degrees earned through VolEd (reported).²²

	Navy	USMC	Army	Air Force
<i>FY08</i>	834	167	700	1,458
<i>FY09</i>	849	154	962	1,520
<i>FY10</i>	821	311	1,100	1,476

Table IV-6. PHDs earned through VolEd (reported).²³

	Navy	USMC	Army	Air Force
<i>FY08</i>	36	18	0	0
<i>FY09</i>	18	2	0	0
<i>FY10</i>	12	0	0	0

²⁰ Data taken from DoD Education Fact Sheets.

²¹ Ibid.

²² Ibid.

²³ Data taken from DoD Education Fact Sheets.

Table IV-7. Certificates awarded through VolEd (reported).²⁴

	Navy	USMC	Army	Air Force
<i>FY08</i>	540	0	57	3,458
<i>FY09</i>	413	0	71	1,533
<i>FY10</i>	387	0	59	1,337

However, using degree completions as the only ROI metric for VolEd effectiveness is rash since it does not take into consideration the multitude of variables that impact completions, i.e. motivation, time, maturity, etc. Degree completions only provide a production snapshot for a given fiscal year. Degrees completed on a voluntary basis (in addition to normal Service demands) normally take longer than on a full time basis due to work/deployment conflicts. In order to better understand effectiveness, course participation must be considered. Table IV-8 through Table IV-11 provide information on the total number of courses that servicemembers have completed in a given fiscal year, and the rate of participation for the overall Service during the same time periods. This data indicates that a significant portion of the military workforce is participating in off-duty and voluntary education.

Table IV-8. Total undergraduate courses completed through VolEd (reported).²⁵

	Navy	USMC	Army	Air Force
<i>FY08</i>	134,479	64,621	276,007	224,981
<i>FY09</i>	146,581	67,533	297,639	224,407
<i>FY10</i>	130,362	72,107	332,946	219,904

²⁴ Ibid.

²⁵ Data taken from DoD Education Fact Sheets.

Table IV-9. Total graduate courses completed through VolEd (reported).²⁶

	Navy	USMC	Army	Air Force
<i>FY08</i>	15,087	4,511	30,008	46,833
<i>FY09</i>	15,390	4,878	23,855	54,309
<i>FY10</i>	14,324	4,720	32,757	50,666

Table IV-10. Total Language & Culture courses completed through VolEd (reported).²⁷

	Navy	USMC	Army	Air Force
<i>FY08</i>	0	40	0	65
<i>FY09</i>	0	11	0	2,647
<i>FY10</i>	0	0	0	2,585

Table IV-11. VolEd participation rate.²⁸

	FY 05	FY 06	FY 07	FY 08	FY 09	FY10
Army	22.3%	33.3%	22.4%	23.8%	23.0%	26.6%
Navy	16.7%	17.8%	18.2%	16.2%	17.4%	15.6%
USMC	13.5%	14.2%	13.1%	12.5%	13.1%	13.8%
Air Force	22.1%	22.2%	24.3%	26.1%	25.4%	25.8%

In summation, the Tuition Assistance Program is a \$600,000,000 benefit program used to assist in the recruitment and retention of the military workforce. There is an overall “goodness” to the program since it promotes self development and creates a better educated servicemember which is consistent with themes found in the NSS (Appendix C). It is debatable however, whether the program is as effective as it could be given the data available for this study. This clearly is an area for future study.

²⁶ Ibid.

²⁷ Ibid.

²⁸ Data derived from Appendices 1 and 2.

G.I. Bill Benefits

G.I. Bill benefits available to servicemembers have dramatically changed since the inception of this educational entitlement. From war to war, the G.I. Bill has provided a vehicle for the U.S. to show its gratitude for service to country. Initially conceived as a means to reintroduce servicemembers into society following WW II, it is now a powerful recruiting incentive for the all volunteer force. Today, educational benefits provided to active duty servicemembers (in-service or post-service) from the VA is over \$7 billion. Table IV-12 presents currently available data from the VA on educational benefit expenditures for three programs covered earlier in this paper. Unlike TA, G.I. Bill benefits incorporate tuition costs plus various stipends that include subsistence payments, etc. It is also designed to provide the greatest benefit to a student who attends an institution of high learning on a full time basis. This data shows that benefits

Table IV-12. G.I. Bill payments per fiscal year.²⁹

Program	Beneficiaries			Total Payments		
	FY08	FY09	FY10	FY08	FY09	FY10
MGIB-AD	354,284	341,969	247,105	\$2,176,424,800	\$2,564,808,160	\$1,876,059,774
Post-9/11	0	34,393	365,640	\$0	\$63,543,141	\$5,102,066,395
VEAP	560	488	286	\$801,243	\$556,166	\$350,015
Total	354,844	376,850	613,031	\$2,177,226,043	\$2,628,907,467	\$6,978,476,184

provided through the Post-9/11 G.I. Bill are growing exponentially and have become the single largest education program for the VA. This trend leads to the conclusion that the Post-9/11 G.I. Bill benefits program will be the only remaining benefits program provided by the VA in a year or two. Moreover, the amount paid in benefits will continue to grow as more servicemembers become qualified to receive Post-9/11 G.I. Bill benefits.

The information presented in Table IV-13 and Table IV-14 show how G.I Bill beneficiaries are putting their benefits to use. The trend again shows that the majority of personnel qualified for benefits provided by the G.I. Bill are flocking to the Post-9/11

²⁹ U.S. Department of Veterans Affairs, *Annual Benefits Report*, Report (Washington DC: Veterans Benefits Administration, Fiscal Year 2010). MGIB-AD (Montgomery G.I. Bill – Active Duty); Post-9/11 (Post-9/11 G.I. Bill); and VEAP (Veterans’ Education and Employment Assistance Act).

G.I. Bill at an astounding rate. In the two years since the implementation of this program, 82.4 percent of educational benefits provided by the VA are devoted to this new program.

Table IV-13. FY09 G.I. Bill education beneficiaries.³⁰

FY09 Program	College, Non-Degree	Graduate	Under-Graduate	Vocational/Technical	Program Totals	Percent of All Programs
MGIB-AD	2,521	2,520	45,129	3,896	54,066	42.8%
Post-9/11	0	0	0	0	34,393	27.2%
VEAP	5	8	32	2	47	0%
Total	2,526	2,528	45,161	3,898	88,506	70%

Table IV-14. FY 10 G.I. Bill education beneficiaries.³¹

FY10 Program	College, Non-Degree	Graduate	Under-Graduate	Vocational/Technical	Program Totals	Percent of All Programs
MGIB-AD	165	205	2,819	860	3,849	1.4%
Post-9/11	81,437	24,853	110,506	5,104	221,900	82.4%
VEAP	0	0	3	0	3	0%
Total	81,602	25,058	113,328	5,964	225,752	83.8%

Summary

This chapter provided information regarding aspects of Service voluntary education programs and the Post-9/11 G.I. Bill. The first part of this chapter provided a review of statistical reports that studied the impact of TA on Service VolEd programs and how TA has influenced recruitment and retention. Based on statistical data alone, it is apparent that there is extreme difficulty in pinpointing quantifiable causal effects on the behavior of servicemembers. Each study captured some factors that influence the behavior of Sailors however, it is impossible to capture all factors. Therefore, the results from any of these studies should not be taken as “the answer” to the study question. Key areas that are brought forward as we try to understand options for program improvement are: (1) tuition

³⁰ U.S. Department of Veterans Affairs, *Annual Benefits Report*, Report (Washington DC: Veterans Benefits Administration, Fiscal Year 2009). Data depicted is not all inclusive and therefore percentages do not add up to 100 percent.

³¹ U.S. Department of Veterans Affairs, *Annual Benefits Report*, Report (Washington DC: Veterans Benefits Administration, Fiscal Year 2010). Data depicted is not all inclusive and therefore percentages do not add up to 100 percent.

assistance (or education benefits) positively influences recruitment and retention; and (2) that the cost effectiveness of the TA program is questionable.

The second part of this chapter attempted to provide insight into education related behavior through surveys. Unfortunately, survey data was only available for Navy personnel. Due to scope and survey recurrence, however, we will assume that these survey results are consistent amongst the other Services. Key themes from these surveys were: (1) servicemembers value educational benefits; (2) servicemembers do not intend to leave the service solely because of the prospect of using Post-9/11 G.I. Bill benefits; (3) there is a certain ambiguity about the funding source of educational benefits, i.e. servicemembers join a Service for educational benefits and not a specific education program such as TA or the G.I. Bill; and (3) a large percentage of servicemembers intend to pass their Post-9/11 G.I. Bill benefits to family members.³²

The last portion of this chapter presented a basic understanding of the breadth and depth of the benefits provided through the Tuition Assistance Program and from the Post-9/11 G.I. Bill. It is clear that the U.S. government places significant value on these benefits programs just by the sheer size of the provided fiscal support. One program is an entitlement, which requires mandatory funding from the government, and the other program is a benefit paid with discretionary funds from the Services. If the Services continue to delay consolidating education programs and services as suggested by the 2005 Joint Service VolEd Committee, then the lingering question in the current fiscal

³² The theme derived from survey information should give pause to the purpose of the entire program since many Post-9/11 G.I. Bill beneficiaries will not be servicemembers. Is this entitlement primarily intended for the servicemember use or family member use? The connection is that TA usage can influence the decision on family member participation and therefore is an area worthy of further study.

environment is whether both of these programs are sustainable given the fact that they provide redundant benefits.

V. CONCLUSIONS

Discussion

The Post-9/11 G.I. Veterans Educational Assistance Act has changed the balance between VA and DoD voluntary educational benefits that are available to servicemembers of the Armed Forces. Both programs have autonomously grown although they are inextricably linked in the minds of veterans, servicemembers, DoD, the VA, and the general public. Governed by separate Titles in U.S. Code, they each serve to further some goals in the National Security Strategy, but can be viewed as redundant when examined from a whole-of-government perspective. Before deliberating viable options, there are several aspects of these educational programs that we must take into consideration.

Governing aspects fall into one of two categories: similarities and differences. These aspects frame the development of acceptable, sustainable and realistic options.

Similarities

- Provide benefits that are available to qualified servicemembers while on active duty; this includes both officers and enlisted personnel.
- Benefits cover the cost of tuition to program limits.
- Funded by federal government annually.
- Authority to fund provided in U.S. Code.
- Used as recruiting and retention incentives.
- Supports U.S. national interests.

Differences

- Post-9/11 G.I. Bill benefits are intended for full time student use and provide the greatest benefit when a student has a full class load. Benefits, however, may be used by part-time students.
- Post-9/11 G.I. Bill beneficiaries must meet minimum eligibility requirements.
- Post-9/11 G.I. Bill benefits include stipends as well as the cost of tuition.
- Post-9/11 G.I. Bill benefits may be transferred to eligible dependents.
- Tuition Assistance is intended for off-duty, part-time education.
- Tuition Assistance may be utilized at anytime.
- Title 10 is written in such a way that DoD has the option to change the level of TA caps or eliminate funding in its entirety.

The following section provides options for consideration by the federal government based on available information during this research.

Options

Option 1 – Eliminate TA as a Voluntary Education Program

The most drastic option available to policy makers is the complete elimination of DoD's Tuition Assistance Program. This program blossomed as a recruiting and retention tool when the Services transitioned into an all-volunteer force. At the time of inception and the decades that followed, the promise of educational benefits was an attractive enticement. However, the recruiting and retention environment has changed. Potential recruits gravitate to the Services for a wide assortment of reasons and the promise of educational benefits is just one factor in the

overall recruiting incentive package. Most importantly, the new Post-9/11 G.I. Bill is available to *ALL* servicemembers and not just a segment of the force as it was in the past.

Although the TA program is more cost effective than benefits afforded through the Post-9/11 G.I. Bill, the TA Program is a benefit program and not an entitlement. Without modifying U.S. Code, which can be extremely problematic, DoD has the latitude to discontinue or modify the TA program. Guidance provided in Section 2007 of Title 10 U.S. Code stipulates that "...the Secretary concerned *may* pay all or a portion of the charges of an educational institution for the tuition or expenses of a member of the Armed Forces enrolled in such educational institution for education or training during the member's off-duty periods..." with the operative word being "may."¹ Therefore, it is within the purview of DoD to modify program policy and reallocate funds where it will see a larger return on its investment.

From a whole-of-government education program perspective, DOD would gain more from its investment by articulating a strategy that leverages voluntary education under the G.I. Bill and Service-directed education under DoD. Servicemembers could still voluntarily pursue any course of study of their choosing utilizing the G.I. Bill while the Services could build skills that are directly applicable to the needs of the Service through Service-directed education. Following this model, a computer specialist would pursue a certification or degree in a like field from a Service funding source while that same computer specialist could alternatively pursue any degree using his entitled G.I. Bill benefits. This meets the intent of the recruiting promise to provide a tremendous education benefit while allowing the Services to increase the education level of the force through directed educational development, thereby increasing combat effectiveness

¹ 10 U.S.C. §2007 (2010)

(enhance skills). This can only be achieved by realigning money into accounts that enable the Services to manage directed education much like the Government Education Voucher (GEV).²

In order to accomplish this option where there is TA funding realignment, each Service would need to formulate rating/MOS roadmaps that specify education requirements for specific specialties and then fund the program to the requisite level (this is a distinct advantage from a programming perspective since Services could predict resource requirements against end strength and force structure). Each roadmap would provide servicemembers a process through which programmed professional development and advanced education met Service needs. Moreover, this option would provide a new level of standardization not seen in the Services today. Ultimately, the goal would be to create a servicemember who is functional and competent in his area of expertise. Examples of this concept exist today in the Services in the form of eArmyU, CCAF, and the Navy's Learning and Development Roadmap (LaDR) for its enlisted force; however, they fail to achieve this goal due to a lack of Service education and funding strategies. In theory, eArmyU courses are tied to a MOS, but are not requirements for career progression. CCAF is also tied to MOS and building core technical skills within the Air Force, but fails to provide the breadth of offerings to completely suit Service needs. Finally, the Navy's LaDR does map out training and education requirements by rating specialty, but lacks the resources to enable committed execution. The Navy's LaDR concept is, however, a blueprint that all Services could emulate. It currently meets the Navy's total force strategic vision "to anticipate Navy warfighting needs; identify associated personnel capabilities; and recruit, develop, manage

² Another example is seen in the Navy's Enlisted-Legalman Paralegal Education Program. This program is designed to prepare Legalmen for success in their current and emerging mission; it is a structured paralegal education program that is required to supplement existing training and provides a career continuum of training, education, and experience. NAVADMIN 061/11 provides a detailed description.

and deploy Sailors in an agile and cost-effective manner.”³ The LaDR in its current form, however, is nothing more than a guide unless properly funded. Given proper resourcing from the realignment of TA funds into an account that allows for Service directed education, the LaDR could transform into a viable and executable program that provides the Services a more qualified warfighter. Additionally, it would reduce voluntary education outlays and put balance into the total voluntary education program from a whole-of-government perspective.

Option 2 – Modify DOD Funding Guidance

The easiest option for DoD to enact is to modify current TA funding guidance that is provided in OSD Memorandum of November 26, 2001.⁴ Current guidance allows the Services to cap voluntary education TA to \$4,500 per fiscal year and no greater than \$250 per semester hour of study, which is not realistic considering data presented in Chapter 4. If the average expenditure per servicemember is less than \$2,000 per fiscal year and the average course load is approximately 2.5 courses per fiscal year per servicemember, it’s questionable to have a policy in place that encourages excess spending on the part of the servicemember when there is not a need. Given these facts it is completely reasonable to set a FY ceiling of \$2,500 per fiscal year thereby influencing the spending behavior of servicemembers.

The varying tuition costs of institutions of higher learning make up a large component of the voluntary education environment. Since servicemembers choose the institution of higher learning they wish to attend, they must be compelled to seek courses of instruction from cost effective schools, not high-end four year institutions. A reduced ceiling cap encourages careful institution selection. It is commonly known that the cost to attend a community college is significantly

³ U.S. Department of the Navy, *Learning and Development Roadmap of Enlisted Sailors*, (Washington DC: OPNAVINST 1500.77, December 14, 2009).

⁴ U.S. Department of Defense, *Uniform Tuition Assistance Policy*. (Washington DC: OSD Memorandum, November 26, 2001).

lower than a four year institution. Although outside the bounds of this research paper, compelling servicemembers to seek two year degrees from community colleges and then matriculate to four year institutions leveraging SOC (Servicemembers Opportunity Colleges) agreements will significantly reduce the overall cost in attaining a degree. Ultimately, however, the goal of participating in the TA program should be to complete a degree. Data provided in Chapter 4 suggests the need for further research on why degree completions are so low given the number of participants in the TA program. The Air Force is clearly the most effective Service facilitating the completion of Associate Degrees through CCAF. So why are the other Services doing so poorly through SOCAD, SOCNAV and SOCMAR? This facet of the TA program demands scrutiny.

A related modification to DoD funding policy suggested for implementation either in conjunction with the aforementioned or separately is placing a limit on the number of degrees pursued or attained utilizing TA. The current system allows a servicemember to pursue a high school diploma, a bachelor's degree, a master's degree, and if in the Navy, a PhD, in the course of a career. This policy is completely unrealistic and not sustainable. It is unrealistic because there is no requirement for an enlisted member to be educated beyond the bachelor degree level of education. Moreover, it is unrealistic because there are very few Service requirements for officers to possess a degree in excess of a master's degree. Using data presented in the previous chapter, the potential overages are clearly apparent and equate to millions of dollars that are unnecessarily expended. Efforts to standardize TA management controls have proven difficult given the many variables that drive education costs and servicemember behavior. Even the 2005 Joint Service VolEd Committee recommendations were unsuccessfully implemented until OASC was launched and funding constraints dictated TA execution levels in FY11. Without change, the

current TA Program policy is unsustainable because there are no real bounds to the program. Additionally, DoD and the Services can never predict realistic funding levels and should never expect a decrease in the number of TA users without change. A degree that exceeds Service requirements should be completed through use of G.I. Bill benefits.

By implementing all or portions of this option, TA expenditures will decrease. Through the placement of realistic bounds on a program that demands little from its servicemembers, and by setting realistic expectations that are achievable across the force, DoD can expect increased productivity from its workforce thereby enhancing its ROI. The merits of this option do require, however, closer examination in the form of a business case analysis that assesses benefits against total program costs in order to better understand the variables that are in play before any program modifications are enacted.

Option 3 – Seek Efficiencies in the TA Program

The last option offered that does not require a change to U.S. Code is to seek efficiencies within DoD that streamline TA program execution. As with any bureaucratic organization, inefficiencies are inherent and endemic. Each Service today provides TA funding according to Service needs while facilitating program execution with dissimilar infrastructure thereby increasing the cost of operations. By eliminating redundancies in the overall TA program, costs associated with “running the business” could be significantly reduced. Two facets of daily operations are suggested for further research.

The first facet involves the use of education portals and enhanced leveraging of shared services between the Services. As presented in Chapter 3, each Service provides access to TA funding through education portals that are highly dissimilar in the cost to manage and maintain.

Army has contracted IBM for its GoArmyEd; Air Force has contracted BAM Technologies for the AFEMS portal; and Navy provides education portal services in-house with government employees. Each system has its merits, but there is a great variance in cost considering the services provided. From top to bottom relative to cost is Army, Air Force and Navy. Given the similarities of services provided, it makes sense to examine the feasibility of transitioning to one system for all Services. By transitioning to one system, DoD gains consistent functionality and consistent execution of policy across all Services while also streamlining functions that are required to manage a program of this magnitude. Key areas that would benefit are: (1) budget management; (2) billing and collections; (3) grade processing; and (4) reduced manpower requirements. A transition to a one system solution would require a panel composed of all Services to examine feasibility and to ensure Service requirements are met. Again, the 2005 Joint Services VolEd Committee attempted to enact items in the spirit of this theme, but was completely ineffectual due to bureaucratic barriers and regimented thinking (OASC is the one exception).

The transition to a one system IT solution could drive the second efficiency aspect of this option. Transitioning to one system execution paves the way for one agency to run the entire TA system for DoD. One path is to select a Service to act as Executive Agent for TA and provide authority to a specific Service to carry out duties as program manager. Another path is to redefine the mission of DANTES and realign TA execution responsibilities to this DoD agency. Although DANTES is not organized to carry out this mission, it could be accomplished through the realignment of responsibilities and personnel within the Services and DoD. This does not, however, consider resistance amongst the Services due to different funding authorizations.

These two avenues of seeking efficiencies are two examples available to DoD to streamline operations and reduce overall program costs. Manpower costs associated with the TA program are excessive as we have seen in Chapters 3 and 4, and surely demand further attention from DoD and the Services in order to create an efficient and effective education system.

Conclusion

This research paper has examined the Post-9/11 G.I. Bill and DoD's Tuition Assistance Program to evaluate possible redundancies in educational benefits resulting from the creation of this new Bill program under Title 38 of U.S. Code. Additionally, the researcher introduced data to better understand government funded education ROI to servicemembers, with a goal of discovering if the federal government can gain efficiencies given the recent change to the educational environment. Throughout this paper, merit for these two educational benefits has been demonstrated and that they do contribute to U.S. National Interests. Since the U.S. depends upon its economic and intellectual strength for status as a superpower, and the entrepreneurial spirit of its citizens is critical for this sustained strength, it only makes sense that education feeds that spirit. It also makes sense that education enables combat readiness of the Armed Forces through various means. Like many programs with a rich legacy, there are reasons for the birth, growth and transformation of a program when the necessity arises. Given the context of the current fiscal environment, the Post-9/11 G.I. Bill is the catalyst for transformation and has created an opportunity for the federal government to achieve greater results with overall reduced cost. There is value in both programs, but from a whole-of-government perspective, they cannot coexist for any length of time in their current form if they are going to be financially sustainable.

The purpose of Title 10 tuition assistance is to further the educational growth of active duty servicemembers on a part time, off-duty, voluntary basis. Title 38 Post-9/11 G.I. Bill benefits are

optimized when utilized as a full time education benefit for active duty servicemembers and veterans alike as preparation for the civilian life transition. Both are powerful funding vehicles that enable recruitment and retention efforts, while allowing for individuals to attain personal education goals. Although separate vehicles to fund an education, they both fill a required niche in providing a meaningful benefit for services rendered to a thankful nation. However, these exorbitant costs are not acceptable given the duplicative benefits they provide to servicemembers unless a higher level of uniqueness is attained from one or both programs. While the elimination of the Title 10 tuition assistance benefit will save DoD funds, reliance on G.I. Bill benefits could cause a corresponding increase in the VA's budget.

Overall, however, the most likely scenario would be a positive effect on the federal budget with decreased funding levels from a whole-of-government perspective. Regardless, effective and efficient administration of the VolEd program will never occur unless DoD articulates a clearly defined objective that subsequently enables the creation of an executable strategy, such as presented in Option 1. It is important to keep in mind that legislature inherently strives to create good for the people as directed by the Constitution, but the intent becomes lost in bureaucratic stovepipes since bureaucracies tend to impede coordination and temper the rate of progress.

In conclusion: do these education programs support the national interests of the United States? Should they be a spending priority for the federal government? The definitive answer for the Post-9/11 G.I Bill is yes since it specifically states this fact in U.S. Code. The answer for the TA Program is less clear, as demonstrated in Chapter 4 of this paper: U.S. Code does not specifically state that the TA Program is a national interest of the United States nor does the National Security Strategy speak directly to DoD funded education. At best, the TA Program is

administered within the spirit of National Security Strategy goals and therefore, could be considered a national interest.

Should DoD redefine the TA Program to better utilize available funding due to the 2008 change in Title 38 of U.S. Code? Through the evaluation of available data for this research, there is precedence to modify the program. There is intrinsic value to the TA Program even with the shortcomings that have been identified. Is it a good program for the Services and the country? Absolutely. Can it be improved upon? There is no doubt, especially if there is better alignment between active-duty education and training as previously suggested. Further study to examine legal, financial, and programmatic merits of the options to eliminate TA, modify DoD funding guidance, or simply seek TA program efficiencies is required. After all, providing educational opportunities to servicemembers has become an expected benefit, one that needs serious review before modification or elimination.

Appendix A

Military End Strength By Service, Officer/Enlisted Status, and Fiscal Year

As of: End of Fiscal Years 2005-2010

Source: Active Duty Personnel Master Files

SERVICE	RANK	2005	2006	2007	2008	2009	2010
ARMY	ENLISTED	405,275	420,165	433,101	452,065	458,220	467,537
	OFFICER	81,208	82,625	84,682	87,610	90,795	94,442
	TOTAL	486,483	502,790	517,783	539,675	549,015	561,979
NAVY	ENLISTED	304,976	293,103	280,838	275,296	272,208	270,460
	OFFICER	52,883	51,995	51,431	51,388	52,031	52,679
	TOTAL	357,859	345,098	332,269	326,684	324,239	323,139
MARINE CORPS	ENLISTED	161,047	161,277	166,741	178,213	182,366	181,221
	OFFICER	18,793	18,975	19,684	20,202	20,709	21,391
	TOTAL	179,840	180,252	186,425	198,415	203,075	202,612
AIR FORCE	ENLISTED	276,118	273,990	263,372	258,095	263,351	263,439
	OFFICER	73,251	70,539	65,722	64,805	65,496	66,201
	TOTAL	349,369	344,529	329,094	322,900	328,847	329,640
TOTAL	ENLISTED	1,147,416	1,148,535	1,144,052	1,163,669	1,176,145	1,182,657
	OFFICER	226,135	224,134	221,519	224,005	229,031	234,713
	TOTAL	1,373,551	1,372,669	1,365,571	1,387,674	1,405,176	1,417,370

Produced by The Defense Manpower Data Center on October 28, 2010 at the request of the author.

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Appendix B

Total Tuition Assistance Participants per Military Service

*Provided by Service VolEd Directors

	FY 05	FY 06	FY 07	FY 08	FY 09	FY10
Army	108,729	167,621	116,233	128,581	126,036	149,682
Navy	59,803	61,402	60,549	53,081	56,452	50,528
USMC	24,366	25,506	24,339	24,736	26,584	27,969
Air Force	79,363	76,610	79,930	84,120	83,655	85,086
Total	272,261	331,139	281,051	290,518	292,727	313,265

Data taken from DoD Voluntary Education Program Report Submissions

Appendix C

National Security Strategy (May 2010): applicable portions.

Renewing American Leadership—Building at Home, Shaping Abroad

Our approach begins with a commitment to build a stronger foundation for American leadership, because what takes place within our borders will determine our strength and influence beyond them. This truth is only heightened in a world of greater interconnection—a world in which our prosperity is inextricably linked to global prosperity, our security can be directly challenged by developments across an ocean, and our actions are scrutinized as never before.

At the center of our efforts is a commitment to renew our economy, which serves as the wellspring of American power. The American people are now emerging from the most devastating recession that we have faced since the Great Depression. As we continue to act to ensure that our recovery is broad and sustained, we are also laying the foundation for the long term growth of our economy and competitiveness of our citizens. The investments that we have made in recovery are a part of a broader effort that will contribute to our strength: by providing a quality education for our children; enhancing science and innovation; transforming our energy economy to power new jobs and industries; lowering the cost of health care for our people and businesses; and reducing the Federal deficit.

Each of these steps will sustain America's ability to lead in a world where economic power and individual opportunity are more diffuse. These efforts are also tied to our commitment to secure a more resilient nation. Our recovery includes rebuilding an infrastructure that will be more secure and reliable in the face of terrorist threats and natural disasters. Our focus on education and science can ensure that the breakthroughs of tomorrow take place in the United States. Our development of new sources of energy will reduce our dependence on foreign oil. Our commitment to deficit reduction will discipline us to make hard choices, and to avoid overreach. These steps complement our efforts to integrate homeland security with national security; including seamless coordination among Federal, state, and local governments to prevent, protect against, and respond to threats and natural disasters.

Building Our Foundation

Our national security begins at home. What takes place within our borders has always been the source of our strength, and this is even truer in an age of interconnection.

First and foremost, we must renew the foundation of America's strength. In the long run, the welfare of the American people will determine America's strength in the world, particularly at a time when our own economy is inextricably linked to the global economy. Our prosperity serves as a wellspring for our power. It pays for our military, underwrites our diplomacy and development efforts, and serves as a leading source of our influence in the world. Moreover, our trade and investment supports millions of American jobs, forges links among countries, spurs global development, and contributes to a stable and peaceful political and economic environment.

Yet even as we have maintained our military advantage, our competitiveness has been set back in recent years. We are recovering from underinvestment in the areas that are central to America's

strength. We have not adequately advanced priorities like education, energy, science and technology, and health care—all of which are essential to U.S. competitiveness, long-term prosperity, and strength. Years of rising fiscal and trade deficits will also necessitate hard choices in the years ahead.

Strengthening National Capacity—A Whole of Government Approach

To succeed, we must update, balance, and integrate all of the tools of American power and work with our allies and partners to do the same. Our military must maintain its conventional superiority and, as long as nuclear weapons exist, our nuclear deterrent capability, while continuing to enhance its capacity to defeat asymmetric threats, preserve access to the global commons, and strengthen partners. We must invest in diplomacy and development capabilities and institutions in a way that complements and reinforces our global partners. Our intelligence capabilities must continuously evolve to identify and characterize conventional and asymmetric threats and provide timely insight. And we must integrate our approach to homeland security with our broader national security approach.

We are improving the integration of skills and capabilities within our military and civilian institutions, so they complement each other and operate seamlessly. We are also improving coordinated planning and policymaking and must build our capacity in key areas where we fall short. This requires close cooperation with Congress and a deliberate and inclusive interagency process, so that we achieve integration of our efforts to implement and monitor operations, policies, and strategies. To initiate this effort, the White House merged the staffs of the National Security Council and Homeland Security Council.

However, work remains to foster coordination across departments and agencies. Key steps include more effectively ensuring alignment of resources with our national security strategy, adapting the education and training of national security professionals to equip them to meet modern challenges, reviewing authorities and mechanisms to implement and coordinate assistance programs, and other policies and programs that strengthen coordination.

Prosperity

“The answers to our problems don’t lie beyond our reach. They exist in our laboratories and universities; in our fields and our factories; in the imaginations of our entrepreneurs and the pride of the hardest-working people on Earth. Those qualities that have made America the greatest force of progress and prosperity in human history we still possess in ample measure. What is required now is for this country to pull together, confront boldly the challenges we face, and take responsibility for our future once more.”

—President Barack Obama, Address to Joint Session of Congress, February 24, 2009

The foundation of American leadership must be a prosperous American economy. And a growing and open global economy serves as a source of opportunity for the American people and a source of strength for the United States. The free flow of information, people, goods, and services has also advanced peace among nations, as those places that have emerged more prosperous are often more stable. Yet we have also seen how shocks to the global economy can precipitate disaster—including the loss of jobs, a decline in standards of living in parts of our country, and instability and a loss of U.S. influence abroad. Meanwhile, growing prosperity

around the world has made economic power more diffuse, creating a more competitive environment for America's people and businesses.

To allow each American to pursue the opportunity upon which our prosperity depends, we must build a stronger foundation for economic growth. That foundation must include access to a complete and competitive education for every American; a transformation of the way that we produce and use energy, so that we reduce our dependence on fossil fuels and lead the world in creating new jobs and industry; access to quality, affordable health care so our people, businesses, and government are not constrained by rising costs; and the responsible management of our Federal budget so that we balance our priorities and are not burdened by debt. To succeed, we must also ensure that America stays on the cutting edge of the science and innovation that supports our prosperity, defense, and international technological leadership.

This new foundation must underpin and sustain an international economic system that is critical to both our prosperity and to the peace and security of the world. We must reinvigorate and fortify it for the 21st century: by preventing cycles of boom and bust with new rules of the road at home and abroad; by saving more and spending less; by resisting protectionism and promoting trade that is free and fair; by coordinating our actions with other countries, and reforming international institutions to give emerging economies a greater voice and greater responsibility; and by supporting development that promotes good governance, unleashes the potential of different populations, and creates new markets overseas. Taken together, these actions can ensure inclusive growth that is balanced and sustained.

Strengthen Education and Human Capital

In a global economy of vastly increased mobility and interdependence, our own prosperity and leadership depends increasingly on our ability to provide our citizens with the education that they need to succeed, while attracting the premier human capital for our workforce. We must ensure that the most innovative ideas take root in America, while providing our people with the skills that they need to compete. That means we must:

Improve Education at All Levels: The United States has lost ground in education, even as our competitiveness depends on educating our children to succeed in a global economy based on knowledge and innovation. We are working to provide a complete and competitive education for all Americans, to include supporting high standards for early learning, reforming public schools, increasing access to higher education and job training, and promoting high-demand skills and education for emerging industries. We will also restore U.S. leadership in higher education by seeking the goal of leading the world in the proportion of college graduates by 2020.

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VITA

Captain Jonathan Picker, USN, is currently a student at the Joint Advanced Warfighting School in Norfolk, Virginia. He is a 1983 graduate from the University of Washington and was commissioned the same year. He completed JPME Phase I through the Naval War College Seminar Program, Phase II education through the Armed Forces Staff College and is a designated Joint Specialty Officer. A career aviator, Captain Picker has served in various operational, command, staff and instructor assignments.

Aviation assignments have included: HC-5 at NAS Agana, Guam; HC-3 at NAS North Island, California; and HC-8 at NAS Norfolk, Virginia. He commanded HC-6 at NAS Norfolk where he led the squadron through its transition from the CH-46D to the MH-60S, the first east coast squadron to accomplish this task. During his tenure, the squadron was awarded two consecutive Battle "E" Awards. Primary aircraft during his career have been the CH-46D, the MH-60S, and the UH-1N.

Shore duty assignments consisted of serving as the first Flag Secretary for Commander, Naval Doctrine Command and at Regional Headquarters Allied Forces Southern Europe where he was assigned to the Communications and Information Systems Division as an Exercise Planning Officer coordinating communication requirements for NATO and PfP exercises.

Sea going assignments have included the USS TARAWA (LHA 1) as the Helicopter Direction Center Officer and the USS BATAAN (LHD 5) as the Air Boss. His last sea going assignment was as Commander of Amphibious Squadron ONE in San Diego, California. He embarked aboard the USS TARAWA for an Arabian Gulf deployment with 13th MEU (SOC) and the USS BONHOMME RICHARD (LHD 6) with 13th MAGTF for RIMPAC 06.

Captain Picker's last assignment prior to attending the Joint Advanced Warfighting School was as the Commanding Officer for the Center for Personal and Professional Development. The Center's primary mission is to provide officer and enlisted Leadership Training, and to execute the Voluntary Education Program for the Navy.