America's Perpetual "Offset"

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Abstract

Warfare is the most complex of human endeavors. While technological and industrial advantages have long played significant roles in America's military successes over the years, it is the American soldier who is, always has been, and always will be the ultimate weapon in the United States Army's arsenal. The final arbiter of victory on any battlefield—past, present, or future—will be an American soldier manning a post, making critical decisions, and acting decisively. In light of this reality, it is essential that the United States Army optimizes the American soldiers' capability to survive and thrive in the chaotic environment of battle.

The Army has recently developed Army warfighting challenges and a Human Dimension Strategy to ensure that it is postured to do this. What is needed next is a holistic and comprehensive *Army Learning Concept* (*ALC*) and an associated *Army Learning Strategy* (*ALS*) to take advantage of recent developments in the learning sciences and technology that now allow for the creation of a "continuous, progressive, learner-centric, and outcomes-based pervasive Army learning environment … to optimize the learning outcomes of all learners."

This paper establishes the background, rationale, and need for an updated *ALC* and briefly describes the major components of the *ALS* which are necessary to operationalize the *ALC* and move it from concept to capability in order to "ensure American soldiers maintain their irreplaceable role in the national defense and security strategy as America's perpetual offset."

We, the leaders of this Army, do not want a fair fight. We want the odds—all the time—always in our favor. And, it's the obligation of our leaders to prepare our soldiers for combat, to ensure that our nation's sons and daughters have the necessary training and resources to win. And we must be ready today, and we must prepare for tomorrow … We want leaders that are tough,

resilient, that can think and out-fight and out-smart the enemy. We want them to be adaptive and agile and flexible. And we want them not only competent, but we want leaders of character.

–Gen. Mark A. Milley

Faced with the overwhelming conventional superiority of the Soviet army in the 1950s, America's leaders sought a strategic "offset"—a means of "asymmetrically compensating for a disadvantage."[1] The answer then was the "New Look" nuclear strategy whereby America used its advantage in nuclear weapons to deter the Soviets from launching their massive conventional army against us.[2]

Nuclear deterrence served the United States well until it didn't. By the 1970s, the Soviet Union had caught up and negated our advantage in nuclear arms. Confronted with the untenable and unwinnable proposition of mutually assured destruction and faced with a demoralized and crippled military in the aftermath of the Vietnam War, the United States had to seek another means of offsetting the continued Soviet conventional arms advantage. The resulting Second Offset turned to America's lead in technological developments to gain the desired offset.[3] Stealth technology, precision-guided munitions, computer networks, and globally positioned satellites were but a few of the technologies that allowed America to maintain its standoff with the Soviets through the height of the Cold War until the Soviet Union's final demise in the early 1990s.

Today, America is confronted with an elusive and ever-adapting enemy who in many ways has adopted its own offset tactics and strategy that, for the most part, have negated our technological and conventional-arms superiority. The ongoing proliferation of nuclear weapons and the growing pervasiveness of technology portend a future where these advantages are even further diminished. To respond to the challenges of a battlefield that once again threatened to tip away from us, then Secretary of Defense Chuck Hagel launched the search for a Third Offset in November 2014.[4] Like its predecessor, the Third Offset had a heavy technological bent to it with the secretary mentioning robotics, autonomous systems, miniaturization, big data, and advanced manufacturing as some of the solutions needed to once more offset the battlefield in America's favor.[5]

At the heart of all of these offsets, of course, are people. As former Chief of Staff of the Army Gen. Creighton Abrams once famously intoned, "Soldiers are not in the Army, soldiers are the Army."[6] Or, as expressed more recently by Gen. Raymond T. Odierno, "The strength of our Nation is our Army, the strength of our Army is

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our soldiers … This is what makes us 'Army Strong.'"[7] The Army's people—both its soldiers and civilians—are ultimately at the heart of discovering and implementing the technological advances or whatever offset strategy the nation pursues to ensure the U.S. Army is able to present to its enemies the overwhelmingly superior military forces it needs to continue to be successful in the years to come.

People are America's (and its Army's) perpetual offset. While Army leaders have long known and frequently expressed this reality, they have in the past several years demonstrated an increasing sense of urgency in undertaking initiatives designed to maintain and advance the Army's historical advantage in the human domain. Although these efforts are focused on optimizing human abilities in all three of the major human learning domains—cognitive, psychomotor, and affective—it is the cognitive domain that has received a great deal of Army leaders' attention in recognition that it is the soldier's mind that holds the key to improved human performance overall.

Intelligent soldiers with optimized thinking capabilities, those who can make sound and timely decisions in extreme circumstances, will be adept at making the decisions necessary to enhance their physical and emotional abilities and develop the physical and mental toughness and resilience needed to operate under any conditions. As philosophers and motivational gurus from Western traditions have held in various forms over the years, it all starts with the mind.

One of the first major steps taken in recent years to enhance soldier cognitive development was the 2011 publication of the *Army Learning Concept 2015* (*ALC 2015*). *ALC 2015* described "an Army learning model that meets the all-volunteer Army's need to develop adaptive, thinking soldiers and leaders capable of meeting the challenges of operational adaptability in an era of persistent conflict."[8] *ALC 2015* was a foundational document that established the nuts and bolts of the methods needed within the Army's training and education system to maximize the development of the human cognitive capabilities required to successfully wage war in the twenty-first century.

ALC 2015 was followed in short order by the *Army Leader Development Strategy 2013* (*ALDS 2013*). Whereas *ALC 2015* had laid out the instructional methodology for "how" to optimize learning outcomes, *ALDS 2013* specified "what" learning outcomes the Army's leader development system should be focused on producing. *ALDS 2013* called for "an Army of competent and committed leaders of character with the skills and attributes necessary to meet the challenges of the twenty-first century."[9] It also emphasized the centrality of the Army's people as America's perpetual offset, stating, "Developing leaders is a competitive advantage the Army possesses that cannot be replaced by technology or substituted for with advanced weaponry and platforms."[10]

The publication of *The U.S. Army Operating Concept: Win in a Complex World, 2020-2040* (*AOC 2014*) in 2014 acknowledged *ALDS 2013's* concerns re-

garding the limitations of relying too much on technology and "advanced weaponry and platforms" in any new offset strategy, noting that "recent and ongoing conflicts reinforce the need to balance the technological focus of Army modernization with a recognition of the limits of technology and an emphasis on the human, cultural, and political continuities of armed conflict."[11] After reviewing anticipated threats, the perceived future operational environment, and the potential military applications of emerging technologies, the *AOC 2014* concluded by supporting the need to maintain the Army's determination to optimize the learning outcomes of its training and education programs, declaring, "What all Army operations will have in common is a need for innovative and adaptive leaders and cohesive teams that thrive in conditions of complexity and uncertainty."[12]

The importance of developing leaders with these characteristics was crystallized in *AOC 2014's* Army warfighting challenges (AWFCs). Several of the AWFCs highlighted leader development and human domain challenges, with AWFC #10 specifically calling on the Army to develop "agile, adaptive, and innovative leaders who thrive in conditions of uncertainty and chaos, and are capable of visualizing, describing, directing, leading, and assessing operations in complex environments and against adaptive enemies."[13]

The subsequent publication of the *Army Human Dimension Strategy 2015* (*AHDS 2015*) represented the Army's commitment to solving the human dimension challenges raised in the AWFCs. Recognizing the sometimes disjointed nature of the Army's current leader development and talent management systems in its attempts to produce the desired leader attributes, *AHDS 2015* outlined a comprehensive strategy for preparing leaders to "thrive in chaos and ambiguity" and to "optimize the performance of our diverse talent."[14] Echoing the alarm sounded by *AOC 2014, AHDS 2015* called on the Army to "actively seek innovative approaches to leverage its unique strength—its people" so that the Army would be assured that it could "maintain the decisive edge in the human dimension—the cognitive, physical, and social components of the Army's trusted professionals and teams."[15]

Prominent among *AHDS 2015's* "innovative approaches" to leader development was the establishment of Army University in June 2015. Intended to "transform our academic institutions, and grow professionals with the intellectual capacity to win in a complex world," Army University was charged with becoming "a premier learning institution for the Total Army developing both military and civilian professionals who can understand and operate successfully within a complex future security environment."[16]

To accomplish the lofty aims of its charter, Army University leaders undertook several initiatives in its first eighteen months of existence. None, however, have been more important to the achievement of the objective of growing "professionals with the intellectual capacity to win in a complex world" than that of updating the *ALC 2015* and devising a holistic *Army Learning Strategy* (*ALS*) to operationalize

the revised learning concept.[17] These two documents together provide a robust framework for developing the "agile, adaptive, and innovative leaders" AWFC #10 demands. Integrating the latest advances in the learning sciences and technology, the new *Army Learning Concept for Training and Education: 2020-2040* (*ALC-TE*), lays out a concept that envisions a continuous, progressive, learner-centric, and outcomes-based pervasive Army learning environment that seeks to optimize the learning outcomes of all learners.[18]

The *ALS* in turn presents a single, focused, governing strategy for learning and establishes the ways and means for moving the ideas presented in the *ALC-TE* from concept to realized capability. While still in draft form, the *ALS* connects the disparate learning communities that already exist throughout the Army and enhances their ability to achieve the learning outcomes they are tasked with producing. To create the pervasive learning environment that is central to *ALC-TE*'s success, the *ALS* looks in part to the Army's distributed learning system and its ability to efficiently push learning to the learner at the point of need using mobile and distance-learning products. Making use of improvements in learning technology that are becoming more widely available, these distributed learning programs and tools also assist the Army in its efforts to make learning learner-centric, capable of adapting to each individual's learning needs and styles. Meanwhile, the application of gamification and other novel learning science methods now made possible by technology represents yet another means now at the Army's disposal of further optimizing learning outcomes. Integrating these many advances into the Army's training and education system will result in a significantly more efficient learning enterprise in which each learner is able to learn more, quicker, and at the higher level of the cognitive learning scale required to produce the leader competencies and attributes necessary to survive and thrive in the increasingly complex and chaotic operating environment.

The *ALS* also seeks to set in motion the establishment of personalized learning networks (PLNs) for each soldier. These PLNs will link learners to "learning leaders"—coaches, teachers, trainers, mentors, unit leaders, etc.—that each soldier can leverage to help them make sense of the learning they are attempting to master. Recognized subject-matter experts in the given field the learner is studying, these learning leaders will help ensure learners are correctly contextualizing and grasping the ideas, knowledge, and thoughts presented in the learning material. As part of the PLN, unit leaders can play the critical role of cementing the learning by providing learning environments within units that allow for the transfer and application of newly acquired knowledge and skills. Finally, in recognition of the importance of the social element of learning, the PLNs would also contain peers and other fellow learners who are working through the same learning problems in order to provide a social support network that can further assist in the learning process.

The key to the success of the approach outlined in the *ALS* is the requirement to create a system for better understanding each learner's individual learning competencies (knowledge, skills, and attributes) and their learning needs. Regarding the challenge raised by AWFC #10 (that the *ALC-TE* and *ALS* attempt to address), it is not that the Army is incapable of, or has not in the past been focused on or successful in, developing leaders of intellect with superior cognitive abilities who can think critically and creatively in complex and chaotic operating environments. The U.S. Army's history is, in fact, a long and distinguished one of producing just such men and women. Rather, the problem is that the Army really has only anecdotal evidence to support explanations of how its successful leaders got that way. The Army has little real baseline data revealing what cognitive abilities soldiers possessed when they entered the Army (or what they knew and were able to do before they attended PME courses or executed training events) by which it can measure the training, education, and operational experiences that have been most effective in contributing to the development of the distinguished leaders it has produced over the years.

In this day and age of "big data," the Army's lack of data on where, how, and what its soldiers are learning is a major limitation in its ability to optimize learning. The Army is awash in data about soldiers' physical, health, and emotional attributes—but it is operating in the blind when it comes to data concerning soldiers' cognitive development. Soldiers are poked, prodded, and tested annually with periodic health assessments to measure their health and fitness; the Global Assessment Tool to measure their resilience (and other measures of "affective" development); and semiannual physical fitness tests to measure their physical development. But the Army lacks pre- and post-cognitive training, education, and experience assessments of soldiers that would help it understand what soldiers are learning, where they are learning, and how they are learning what they learn throughout the course of their service. The Army's training and education system is in many ways stuck in the past, using an industrial age, draft-era, assembly-line approach to leader development that is ill suited for the wired, information age, volunteer-era world of today.

Moving forward, the Army must make better use of the ongoing advances in the learning sciences and technologies that allow for the adoption of individual, accelerated, and adaptive learning strategies that optimize learning. The Army's extensive training and education programs require an updated, deliberate, and purposeful approach to learning that would ensure the Army is maximizing the return on the considerable investment it commits to training and professional military education every year. The learning system conceptualized in *ALC-TE* that the *ALS* operationalizes would provide the Army with the critical capabilities needed to develop the agile, adaptive, and innovative leaders essential to conduct the unified land operations and multidomain battle concepts by which it will achieve success in the contemporary operating environment.

Conclusion

While industry and academia work with the Army to develop, test, and implement the envisioned components of the Third Offset to ensure that we are never faced with a "fair fight," Army leaders have kept their eyes squarely on optimizing its perpetual offset—its people. American soldiers have long been the Army's true historical advantage but, as almost every financial prospectus states clearly, past performance is no guarantee of future results. The United States Army cannot be content to rest on its laurels and hope it will continue to produce the leaders needed to successfully wage war using the same methods it has long relied on to do so. As Army leaders have long noted, hope is, indeed, not a method.

A year after delivering his clarion call to arms demanding that Army leaders ensure American soldiers were never confronted with a fair fight, Gen. Mark Milley reemphasized the importance of people to the Army's success and the need to improve the Army's leader development programs. Concluding his address to the 2016 Association of the United States Army luncheon, Milley noted,

> [People are] our most valuable asset, and arguably our most significant asymmetric advantage inherent in the American military and the United States Army, for we come from a society of improvisers, a society of tinkerers, innovators, problem solvers, techno-savvy at an early age. An independence of action comes natural to all Americans. Self-starting initiative, disdain of boundaries and rules, nonlinear critical thinking, and an aggressive will to win, coupled with an eternal optimism to overcome all obstacles to achieve the objective. All that is hard-wired in the national DNA of an American soldier.
>
> Our leader development programs, officer and NCO schooling and training, and individual soldier training is going to have to amp up in order to leverage the already present inherent qualities in all of our soldiers from private to general.[19]

The *ALC-TE* and *ALS* provide the wattage needed to "amp up" the Army's training and education programs and produce the optimized soldier capabilities necessary to win on the modern battlefield. The realization of the continuous, progressive, learner-centric, outcomes-based, pervasive learning environment concept outlined in *ALC-TE* will ensure American soldiers maintain their irreplaceable role in the national defense and security strategy as America's perpetual offset.

Notes

Epigraph. Mark A. Milley, "CSA's National Guard Association of the United States Speech," Army.mil website, 11 September 2015, accessed 3 April 2017, https://www.army.mil/article/155581.

1. *Wikipedia*, s.v. "offset strategy," last modified 21 January 2017, accessed 2 April 2017, https://en.wikipedia.org/wiki/Offset_strategy. An entry in Wikipedia describes an offset strategy: "Rather than match an opponent in an unfavorable competition, changing the competition to more favorable footing enables the application of strengths to a problem that is otherwise either unwinnable or winnable only at unacceptable cost."

2. "Dwight D. Eisenhower: Foreign Affairs," Miller Center website, accessed 3 April 2017, https://millercenter.org/president/eisenhower/foreign-affairs; Peter Grier, "The First Offset," *Air Force Magazine* 99, no. 6 (June 2016): 56–60, accessed 3 April 2017, http://www.airforcemag.com/MagazineArchive/Magazine%20Documents/2016/June%202016/0616offset.pdf.

3. Zachary Keck, "A Tale of Two Offset Strategies," The Diplomat website, 18 November 2014, accessed 3 April 2017, http://thediplomat.com/2014/11/a-tale-of-two-offset-strategies/.

4. Ibid.

5. Sydney J. Freedberg Jr., "Hagel Lists Key Technologies for U.S. Military; Launches 'Offset Strategy,'" Breaking Defense website, 16 November 2014, accessed 2 April 2017, http://breakingdefense.com/2014/11/hagel-launches-offset-strategy-lists-key-technologies/.

6. Creighton Abrams, quoted in Lewis Sorley, *A Better War: The Unexamined Victories and Final Tragedy of America's Last Years in Vietnam* (San Diego: Harcourt, 1999), 370.

7. Ray Odierno, quoted in Ash McCall, "Initial Thoughts from General Ray Odierno—38th Chief of Staff of the Army," Army Live blog, 8 September 2011, accessed 2 April 2017, http://armylive.dodlive.mil/index.php/2011/09/initial-thoughts-from-general-ray-odierno-38th-chief-of-staff-of-the-army/.

8. U.S. Army Training and Doctrine Command (TRADOC) Pamphlet (TP) 525-8-2, *The U.S. Army Learning Concept for 2015* (Fort Eustis, VA: TRADOC, 20 September 2011), 5, accessed 2 April 2017, http://www.tradoc.army.mil/tpubs/pams/tp525-8-2.pdf.

9. *Army Leader Development Strategy (ALDS) 2013* (Washington, DC: U.S. Government Publishing Office [GPO], 5 June 2013), 6, accessed 2 April 2017, http://usacac.army.mil/sites/default/files/documents/cal/ALDS5June%202013Record.pdf. The specific attributes (what a soldier is) and competencies (what a soldier does) are further outlined in the Army leader requirements model in Army Doctrine Reference Publication 6-22, *Army Leadership* (Washington, DC: U.S. GPO, August 2012), 1-5.

10. *ALDS 2013*, 3.

11. TP 525-3-1, *The U.S. Army Operating Concept: Win in a Complex World, 2020-2040* (Fort Eustis, VA: TRADOC, 31 October 2014), 8.

12. Ibid., 16.

13. Ibid., 31 and 50; "Army Warfighting Challenges," Army Capabilities Integration Center website, as of 31 January 2017, accessed 3 April 2017, http://www.arcic.army.mil/App_Documents/AWFC-Current.pdf. The Army warfighting challenges (AWFCs) were conceived as "an analytical framework," which would serve to focus and "integrate efforts across warfighting functions" to find solutions to the outlined challenges. The derived solutions to these challenges would then become the means by which the Army would work to improve the "combat effectiveness of current and future forces." AWFC #9 (Improve Soldier, Leader, and Team Performance) added "resilience" and a "commitment to the Army professional ethic" as additional characteristics required of Army leaders to be able to

accomplish missions in "environments of uncertainty and persistent danger." AWFCs #1 "Develop Situational Understanding," #2 "Shape the Security Environment," and #19 "Exercise Mission Command" also contain important human dimension components intended to ensure the development of leaders with the cognitive skills necessary to deal with the complexity of modern battle.

14. *The Army Human Dimension Strategy 2015* (Washington, DC: U.S. GPO, 24 May 2014), Foreword, accessed 3 April 2017, http://usacac.army.mil/sites/default/files/publications/20150524_Human_Dimension_Strategy_vr_Signature_WM_1.pdf.

15. Ibid., Introduction.

16. "Army University Proclamation," Army University website, 20 November 2016, accessed 4 April 2017, http://armyu.army.mil/sites/default/files/documents/ArmyU%20Proclamation.pdf.

17. TRADOC, *Army Learning Strategy*, (Fort Eustis, VA: TRADOC, forthcoming).

18. TP 525-8-2, *The U.S. Army Learning Concept for Training and Education: 2020-2040*, (Fort Eustis, VA: TRADOC, April 2017).

19. Mark A. Milley (speech, Dwight David Eisenhower Luncheon, Association of the United States Army Luncheon Convention, Washington, DC, 4 October 2016), Defense Video Imagery Distribution System video, 1:16:03, accessed 4 April 2017, https://www.dvidshub.net/video/485996/ausa-2016-dwight-david-eisenhower-luncheon.