

JOINT MATERIEL STANDARDS ROADMAP

1. Introduction. An inter-Department and Agency working group prepared this roadmap in response to a June 6, 2001, memorandum from the Under Secretary of Defense (Acquisition, Technology, and Logistics). The roadmap defines the Department of Defense (DoD) course of action to ensure that materiel standards¹ used by the DoD, both commercial and government, continue to support the warfighters' operational requirements and are consistent with the new National Defense Strategy. It also serves as a means for prioritizing the Department's efforts in support of the development and maintenance of non-government and government standards.

2. Background. The DoD has made significant progress in Military Specifications and Standards reform. To date we have canceled or migrated more than 9,600 military specifications and standards to international or non-government standards. Another 8,100 military documents have been inactivated and retained only to support legacy systems and equipment. Today, the DoD relies on more than 30,000 different types of standards, including performance specifications, international standardization agreements, non-government standards, commercial item descriptions, as well as military specifications and standards. The objective of the roadmap is to reduce the number of endorsed standards to those required to support interoperability and logistics operations, bring discipline to the international standardization agreement process, and develop an automated tool to assist Program Managers. As the DoD looks to the future, we must ensure that our standards efforts support the operational requirements for joint Service and coalition interoperability and a dramatically reduced logistics footprint articulated in the Quadrennial Defense Review (QDR) and the Future Logistics Enterprise (FLE).

3. Purpose of the Joint Materiel Standards Roadmap (JMSR). The purpose of the JMSR is to establish a filtering process to ensure that we develop and maintain standards needed to support the goals of the QDR and FLE. The operative word in the JMSR is "roadmap" because it provides a coherent migration of DoD's standardization program consistent with the new National Defense Strategy. Those standards that make it through the filtering process will be included in a centralized database called the Program Manager Tool (PMT). The PMT will provide program offices, and the many organizations that support them, with a technical route for the selection of other than information technology standards to reach destinations involving interoperability, logistics readiness, safety, and other operational needs. It will categorize standards by importance and by product category using the Work Breakdown Structure. While the PMT will include a small number of standards mandated by law or regulation, for the most part, the PMT will contain preferred standards that Program Managers should consider using. The PMT is not intended to be a mandatory architecture, such as the Joint Technical Architecture (JTA), nor will it include the standards from the JTA, except perhaps, in rare cases when a standard may also address other than information technology requirements (e.g., human factors or safety).

¹ The term standard is used generically to represent any type of standardization document developed, approved, or adopted under the auspices of the Defense Standardization Program. Such documents would include international standardization agreements, non-government standards, and defense and federal specifications and standards. For a complete description of these types of standardization documents, refer to DoD 4120.24-M, "Defense Standardization Program (DSP) Policies and Procedures," which is available online at www.dsp.dla.mil.

4. Purpose of this Document. The purpose of this document is to:

- a. Provide the criteria for identifying those standards that meet the future desired state for standards in the DoD.
- b. Describe the JMSR filtering process.
- c. Describe how documents that make it through the JMSR filtering process will be included and accessed in the PMT.
- d. Propose metrics that could be used to measure the effectiveness of the JMSR process and application.

5. Criteria for JMSR Candidate Standards. The JMSR vision for the future desired state is to have a smaller and more focused body of standards that have been endorsed by OSD, the Military Departments, and Defense Agencies as required for meeting interoperability and logistics operations. A standard can be considered for inclusion in the JMSR if it is an active or new DSP document that meets at least one of the following criteria:

- a. The standard is necessary to support DoD operational requirements needed to achieve a capability to accomplish approved military objectives, missions, or tasks.
- b. The standard is needed to ensure interoperability for a “family of systems,” between systems, subsystems, or materiel within a Service, among Services, or with military treaty organization allies (excludes information interoperability as defined in the JTA).
- c. The standard is needed to meet the goals of the FLE for enhanced readiness, a reduced logistics footprint, complete supply chain visibility, improved transportation, or reduced and improved maintenance.
- d. The standard is needed to ensure safety.

6. JMSR Filtering Process. All types of standards used by the DoD will be reviewed to determine whether they support one of the following interoperability and logistics operational goals. Those standards that do not support one of these goals will be considered for cancellation.

- a. Interoperability. Each Military Department will establish a process to identify and review all documents associated with establishing other than information technology interoperability requirements that are needed to meet the warfighters’ operational needs. The level of interoperability may be among systems and equipment within a Military Department, among the Military Departments, or with treaty and coalition partners.

b. Future Logistics Enterprise. The Office of the Deputy Under Secretary of Defense (Logistics and Materiel Readiness), the Military Departments, and the Defense Logistics Agency (DLA) will analyze the Future Logistics Enterprise process flows and identify standards integral to this process. Through the analysis process, the requirements for new standardization efforts will be identified. As logistics processes are more completely defined, the Military Departments and DLA will determine what standards will be needed to support the future state of logistics. These actions will make the roadmap an instrument for charting future directions and identifying needed resources.

c. Safety. Each Military Department will establish a process for identifying and reviewing all documents associated with safety critical items.

d. Coalition Warfare. The Military Departments and DLA will review all ratified International Standardization Agreements (ISAs) and their implementing standards to ensure that each requirement is still valid and supports U.S. participation with our allies in coalition warfare. Each Military Department and DLA will establish a process for identifying all ratified materiel ISAs and associated documents that implement the ISAs. If the U.S. intends to comply with a materiel ISA, U.S. ratification of the ISA should be retained. If the U.S. does not intend to comply, then U.S. ratification of the ISA should be withdrawn. If necessary, the Military Departments or DLA should take corrective action when implementing documents are not available, or have been cancelled, inactivated for new design, or replaced with another type of standardization document.

7. JMSR Approval Process for Retaining Standards.

a. Joint Standards. The Defense Standardization Council (DSC) will approve all requests for retaining standards that meet the JMSR criteria and that apply to more than one Military Department or Defense Agency. Only a Standardization Executive or Departmental Standardization Office (DepSO) can submit requests to the DSC via DSPO for standards retention approval.

b. Single-Service Standards. The cognizant Standardization Executive will approve all requests for retaining standards that meet the JMSR criteria and that apply to only a single Military Department. A copy of the approval must be sent to the other Standardization Executives for information and to DSPO.

8. Program Manager Tool (PMT). Once standards have been approved for retention based on the JMSR criteria, they will be considered for inclusion in the PMT.

a. The standards in the PMT will be organized around the Work Breakdown Structure (WBS), for the seven defense materiel items identified in MIL-HDBK-881². The PMT will allow for the WBS structure to be expanded beyond the top three levels described in MIL-HDBK-881 as necessary. It is important to note that the WBS structure is only a starting point that will be expanded to include other support areas, such as medical or personal equipment and supplies, as identified by the Services.

b. The following key information will be recorded for each document nominated for inclusion in the PMT:

Whether use of the standard is mandatory or preferred

(2) A brief description of the basis for the standard being mandatory (e.g., law, government regulation, directive, etc) or rationale for the standard being preferred.

(3) A statement about the logistics, interoperability, safety, or operational impact if the standard is not used.

9. Maintenance of the PMT. Once standards are approved for inclusion in the PMT, the information about these standards will be maintained to ensure currency. Since the PMT will be a “virtual” tool rather than a paper document, it will be modified continually as information about the standards changes. The DSPO will grant specific authorization to individuals recommended by their DepSO to modify information about the documents included in the PMT.

10. Roles.

a. The DSC will approve all standards for retention that meet the JMSR criteria and that have been designated for joint requirements. The DSPO will screen joint nominations, ensure that complete nomination information is provided, and bring them before the DSC for approval.

b. Standardization Executives will be responsible for approving Service-specific standards for retention that meet the JMSR criteria.

c. The Military Departments and DLA will establish procedures for nominating documents to their respective Standardization Executives with appropriate backup material.

d. The Document Automation and Production Service (DAPS) will establish a PMT module in the ASSIST and maintain PMT data for access by users.

² MIL-HDBK-881 defines the following levels in the WBS: aircraft system, electronic/automated software system, missile system, ordnance system, ship system, space system, and surface vehicle system.

1. Accessing the PMT.

a. The primary source for information about documents in the PMT is the ASSIST-Online. A PMT icon will appear on the Document Analysis page for each document in the JMSR. This icon will be linked to a page that explains the PMT and that allows qualified users to generate various preformatted reports about PMT documents.

b. The ASSIST-PMT module will allow designated reviewers to map approved mandatory or preferred materiel standards to level 3 work breakdown structure categories.

c. The ASSIST-PMT will enable Program Managers to identify ISAs and associated implementing documents that apply to specific programs, and to build one or more profiles of mandatory and preferred standards applicable to various levels in the Work Breakdown Structure. Authorized users will also be able to order custom CDs from DAPS with copies of all documents in the profile.