

Staff Officers Guide



Written by CAS3 For Instructional Purposes Only

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Staff Officer's Guide

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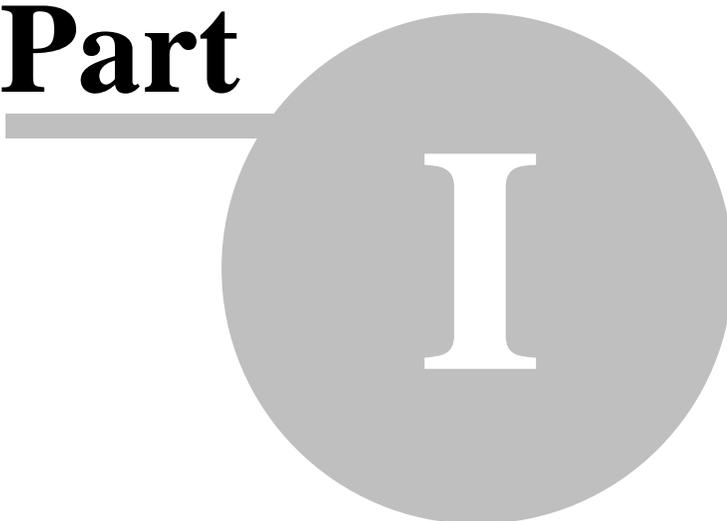
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General

Part



1 General

Purpose

To establish administrative policy and staff procedures for Headquarters, 52d Infantry Division (Mechanized) and Fort Riley and to provide staff officer tips and guidelines.

Applicability

This publication applies to all staff activities and subordinate elements of Headquarters, 52d Infantry Division (Mechanized) and Fort Riley.

References

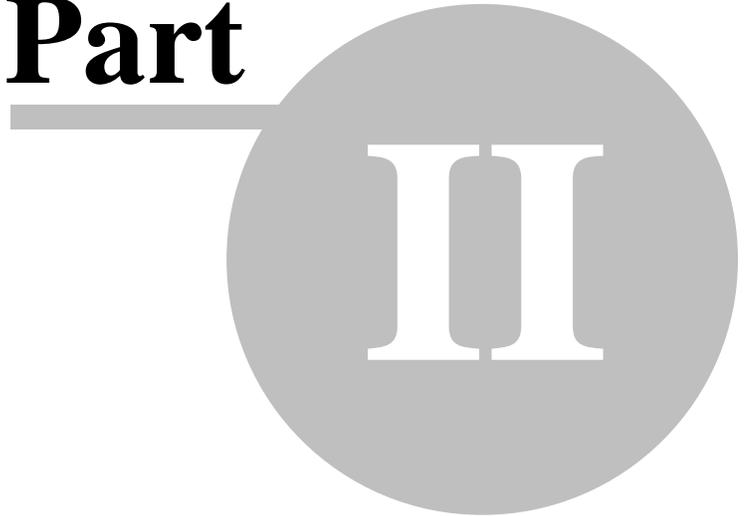
Required and related publications are listed in appendix A.

Explanation of Terms and Abbreviations

Special terms and abbreviations are listed in appendixes B and C, respectively.

Staff Officer Guidelines

Part



2 Staff Officer Guidelines

Organization and Functions

The organization and functions of each staff activity are covered in 52d ID & FR Reg 10-3, *Manual of Organizations and Functions*, 24 Aug 92.

Responsibilities

a. The Directorate of Information Management (DOIM) is responsible for distributing all correspondence, official mail, and messages coming into this headquarters.

b. The Secretary of the General Staff (SGS):

(1) Is responsible for the administrative control of the headquarters.

(2) Acts as the liaison between the command group and action officers concerning correspondence and administrative procedures.

(3) Assigns actions to appropriate offices and monitors suspenses using the Staff Action Control System (SACS).

(4) Reviews all correspondence and actions sent to the command group to ensure administrative completeness and correctness, appropriate coordination, and compliance with established policies.

(5) Controls and accounts for all actions that require a response to a higher headquarters.

(6) Monitors correspondence and actions within the command group to ensure timely execution.

(7) Dates all correspondence signed by the command group. Dates are generally placed on documents after signature.

c. The deputy garrison commander will control and monitor the suspense actions assigned to the garrison staff activities.

d. Staff principals are responsible for control of correspondence and suspense actions within their respective functional areas.

e. Brigade and battalion executive officers (XOs) are responsible for the control of correspondence and suspense actions within their units.

f. Action officers:

(1) With guidance from their staff principal, determine what action is required, what level of approval is required, and who is to sign the action.

(2) Carefully review the final product to ensure use of appropriate letterhead, proper format, and administrative correctness prior to forwarding to the signature authority.

- (3) Complete research and coordination of actions prior to forwarding the action.

General Guidelines

- a.* Pay attention to details. The staff officer's job is to manage the organization's detailed affairs to free up commanders so they can be more effective leaders.
- b.* Learn to listen. Communication is not complete until the receiver understands the message. Develop an effective note-taking system. Ask questions to understand what you are required to do.
- c.* Do not be a bureaucrat. A staff officer's job is to make life easier for subordinate commands, not more difficult and cumbersome. Consider the impact of your action on the subordinate units.
- d.* Do not say "No" to commanders. You may always recommend "No." If in your attempt to support you find an action to be illegal or illogical, tactfully say so in your recommendation.
- e.* Be part of the solution, not part of the problem. Work to correct problems instead of finding fault; find out what went wrong and correct it. A good staff officer always proposes a feasible solution to any problem he or she advances up the chain. A staff officer who does less simply becomes part of the problem.
- f.* Do not be afraid to tell your boss bad news. Inform him or her as early as you can gather initial information and propose a feasible solution.
- g.* Do not make yourself so invaluable that you cannot be replaced. Train your subordinates to work in your absence. Develop and update SOPs, contact lists, and continuity files so you can leave at any moment without disruption to your internal operation.
- h.* Effective staff officers are rarely surprised by change. Learn to anticipate. Develop several contingency plans in case something unforeseen blocks your plan of action.
- i.* Identify those action officers and staff officers in your organization and in other agencies or organizations with whom you will deal frequently. Get to know them and the actions they are working. Maintain an awareness of actions being taken throughout the staff which may impact on your functional area of responsibility.
- j.* Learn to analyze and synthesize. More information is not necessarily better. A good staff officer can identify the essential elements of a complex action and can reduce the action to one or two pages of information without loss of content. Be clear; be concise; be gone.
- k.* Concentrate on substance when writing. One syndrome associated with the staff environment is the tendency to spend excessive amounts of time writing and rewriting papers. Staff papers must be written clearly and concisely, but do not need to be literary masterpieces. Substance is the essential element. While professional writing ability is not a requirement, you will be expected to submit papers using proper grammar, spelling, and administrative procedures. DA Pam 60067, *Effective Writing for Army Leaders*, will give you valuable tips.
- l.* Every staff action you forward to the command group contributes to or detracts from your reputation. Don't send it up unless you are ready to put your name on it. Autograph your work with excellence.

m. Always follow through. A staff plan or action is not complete until you have assessed the results of its execution. The staff officer is responsible for tracking an action until the desired results are obtained. An action passed IS NOT an action completed.

n. Get things done by not waiting to be told what to do. Actively seek areas that need attention.

Staff Leadership

a. Develop your subordinates. Remember--your subordinates will have your job someday. They will only be as good at the job as you make them today. Productively employ everyone to gain your section's full capability. Underwrite your subordinates' mistakes; give them the opportunity to grow by delegating tasks to them as you coach and train them. Program time for both you and your subordinates to develop professionally. Counsel and mentor your subordinates frequently.

b. Train your section's soldiers. Remember--some are working off the "front line" of their primary MOS. Staff section SGMs are responsible for the enlisted soldiers, while staff principals are responsible for the officers. Establish training management within the section per FM 25-100 and FM 25-101.

c. Tell your subordinates when they have done a job well. Use the award system. Start reenlisting your good soldiers on their first day. Take care of your civilian employees as you would your soldiers.

d. Check the maintenance of your equipment often to keep your equipment in top condition. Take an active role in accounting for your section's property. Schedule time for your people to maintain your equipment.

Time Management

a. Learn to analyze and solve tomorrow's problems instead of reacting to yesterday's problems. Time spent solving yesterday's problems is wasted. Know the division's long-range planning calendar as it impacts your staff area of responsibility. A good staff officer anticipates requirements.

b. Plan your schedule so you have time to reflect and to be creative.

c. Understand the requirement before you begin. If you are not sure, return for additional guidance. To work on the wrong problem is a waste of valuable time.

d. Work smarter, not harder. Harness technology; however, do not allow information technology to be a chokepoint to your work. A computer should be the means to the end, not the end itself.

e. An "OK" staff product that is timely is far better than an "excellent" product that is completed at the last minute or that is late; however, the "OK" mentality is not a license to do marginal work when time is available to produce a better product.

f. Organize your work. Most staff officers have more work to do than time allows. Develop a priority and tracking list. Work on the most important action first; provide interim responses on the other actions. When you begin and close each day, take stock of where you are headed.

g. Accomplish your work during duty hours. Do not develop a habit of working late or on weekends. While night or weekend work may be necessary at times, during peacetime those times should be relatively few.

h. Accept responsibility for yourself. You are responsible for your own well being. Keep yourself physically, mentally, and spiritually fit. Schedule your leave, hand off your actions, and go! Spend time with your family. Provide a climate for your subordinates to do the same.

Operations Security

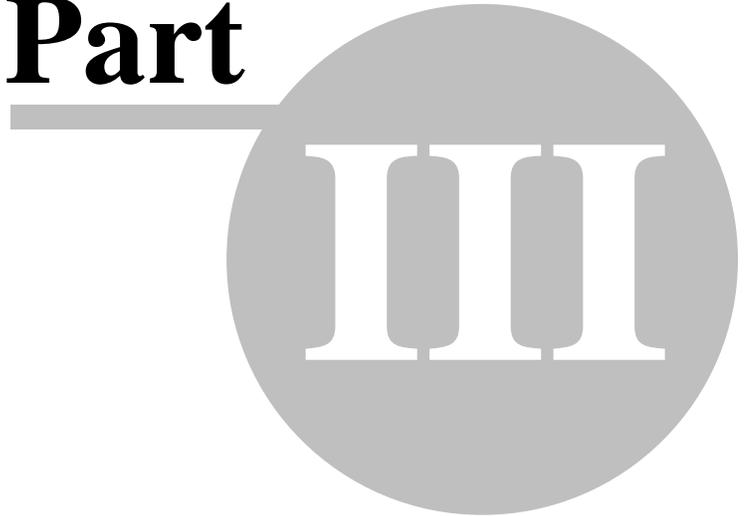
a. Operations security (OPSEC) is the process of selecting and executing measures that eliminate or reduce to an acceptable level the vulnerabilities of friendly actions to adversary exploitation. OPSEC includes the traditional functions of physical security, signal security, information security, and countersurveillance.

b. The staff officer is exposed to highly classified information in an environment of urgency--a combination that can cause a lapse of security. Safeguard classified material properly. Check security clearances before giving someone classified information; do not assume everyone has the proper clearance or the need to know the material.

c. Consider the telephone a security hazard. Never discuss classified information on an unsecure telephone. Do not "double speak" around classified subjects. Be aware of classified conversations in your area while using your telephone.

Staff Action Preparation and Control

Part



3 Staff Action Preparation and Control

Origin and Assignment

a. Staff actions can originate from any one of many sources, both external and internal to the division and installation. The majority of these actions can be handled informally; however, those actions requiring command group involvement will require a formal response.

b. The Chief of Staff (CofS), acting for the Commander, is responsible for supervising, coordinating, managing, and prioritizing the work of the general and special staffs. The Garrison Commander (GC) is responsible for supervising, coordinating, managing, and prioritizing the work of the installation staff. Staff principals and directors are responsible for internally managing and processing correspondence, reports, and studies.

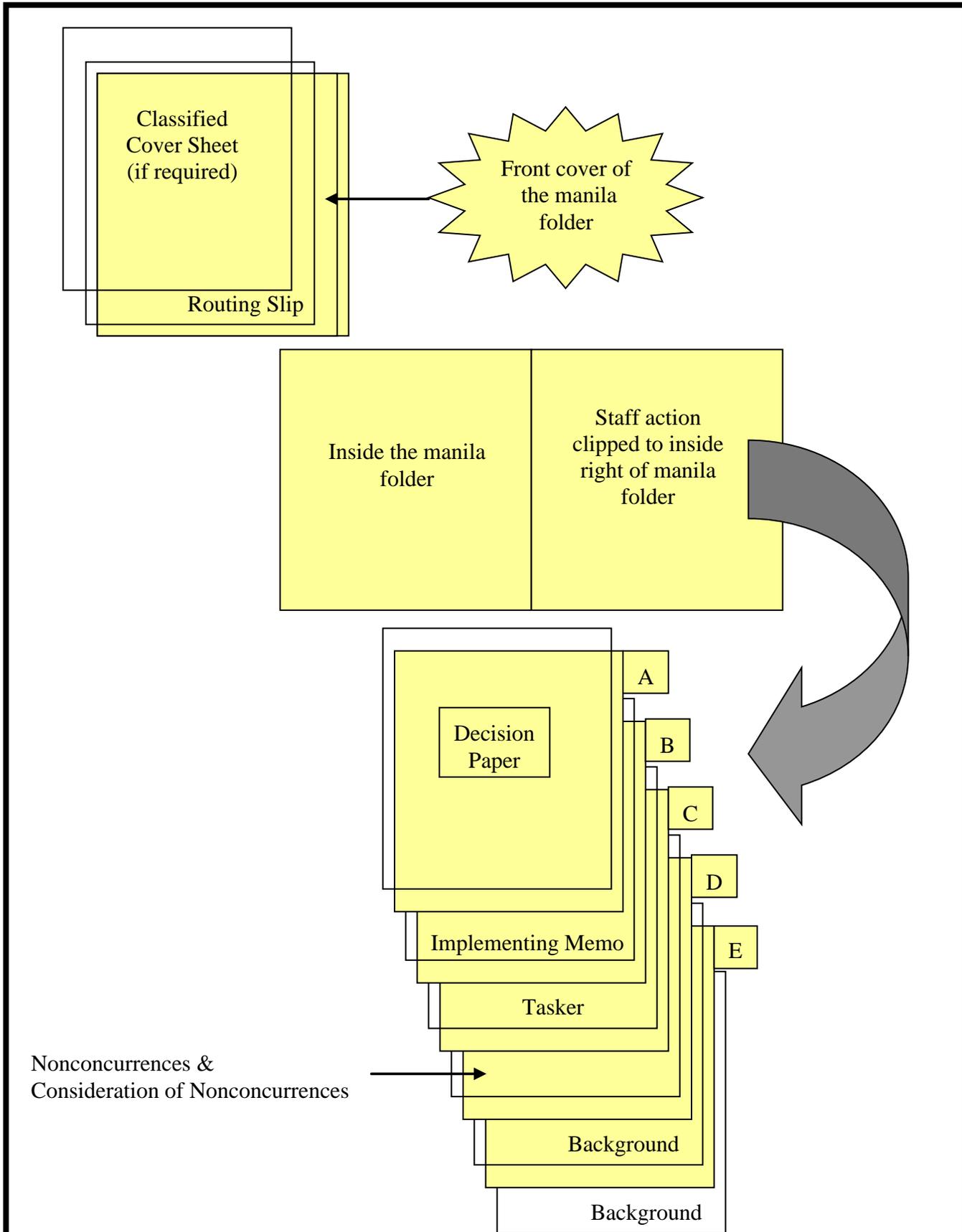


Figure 3-1. Assembling a staff action.

Incoming Correspondence

a. Incoming correspondence is normally processed through the Directorate of Information Management (DOIM), Central Mail and Distribution Branch (CMDB), building 2038. The CMDB will refer routine correspondence to the appropriate staff agency for action and to others concerned. If the correspondence is of command group interest, the CMDB will simultaneously route the correspondence to the command group.

b. The CMDB routes correspondence to staff elements based on information in the address and/or the context of the document subject or body.

c. When a staff agency receives correspondence directly or determines correspondence to be of command group interest, the agency will notify the Secretary of the General Staff (SGS) and provide him or her a copy of the correspondence for command processing. The staff principal generally determines what action is required and whether command group interest will be necessary.

d. Route all correspondence signed by a general officer, a commander, or a civilian equivalent directly to the SGS. The SGS will assign the action on this correspondence and make appropriate distribution.

e. Route all correspondence containing a suspense to the SGS, unless the action is clearly a garrison matter; route garrison matters to the GC. Answer all correspondence requiring a response to higher headquarters as soon as possible within the established suspense date.

f. Telephonic replies to written correspondence are generally not appropriate unless specifically allowed or requested by the originating headquarters.

Special Interest Correspondence

a. Special interest correspondence is correspondence addressed directly to the Commanding General from the Executive Branch, members of Congress, and other Federal, state, or municipal officials. In certain cases, letters from a soldier's relatives, legal representatives, clergy, and other individuals or organizations are included in this category.

b. Immediately forward correspondence of this nature to the SGS who will assign the action and make appropriate distribution.

c. Make every effort to reply to special interest communications within 3 duty days of receiving the action. If you are unable to complete the final action during this period, prepare an interim reply acknowledging receipt and notifying the originator when a final reply may be expected. The SGS will determine the proper signature on replies to special interest correspondence.

Decentralization

a. The purpose of decentralization is twofold. First, it makes efficient decision making easier. Second, it ensures staff members have the greatest opportunity for professional growth. Decentralization, characterized by delegation of authority, should typify staff operations.

b. Staff principals are delegated authority to take final action for the commander on appropriate subjects within their functional areas of responsibility, but *never in an area that will alter or establish*

a command position.

c. Decentralization aims to give leaders maximum latitude, rather than requiring all decisions to be made at the highest levels.

Command Group Inquiries

Questions from the CG, ADC-M, ADC-S, CofS, GC, or DCSM must be answered expeditiously. The SGS will identify questions that require an immediate response (less than 24 hours). Answers to command group questions may be in the form of office calls, staff meeting comments, handwritten notes, or e-mail. When responding to a command group inquiry, always inform the SGS and provide him or her with a courtesy copy to confirm the action is complete.

Reports

Reports, other than those required by regulation, SOP, or higher headquarters, will not be required from subordinate commanders without the approval of the CofS.

Suspenses

a. The policy of this headquarters is to answer all suspenses on time. The SGS administrative section (SGS Admin) will maintain a log of all suspense actions that have command group interest. SGS Admin will update and distribute the log to all primary and special staff sections weekly. Normally, the log contains only those suspenses that require written responses to higher headquarters or were initiated by a member of the command group.

b. The CofS, the SGS, or the GC establish most internal suspenses. The tasker should indicate whether these offices have an external requirement for that suspense.

c. Suspense dates to installation staff sections and to subordinate commands must be realistic and relative to the level of command that requires the input. A minimum of 10 duty days is the standard for suspense dates that this headquarters generates. In special circumstances, staff principals are the only individuals authorized to reduce the minimum standard suspense dates. Your staff principal may return correspondence reflecting a suspense date that does not conform to the above standards and is not personally signed by another staff principal or deputy.

d. Suspenses may be extended for good reasons. When you receive an action, evaluate the time allowed to complete it. If the time is insufficient, request an extension by the quickest, most direct means of communication. Don't wait until the last minute to request an extension; submitting it early increases your chances for approval and permits better budgeting of your time if the extension is not approved.

e. If an extension to a higher headquarters' suspense is required, the staff principal will contact the originating higher headquarters staff section and will notify the SGS of an adjusted suspense date. SGS Admin will annotate the extended date on the suspense log and notify the command group.

f. If a suspense date cannot be met and an extension is not granted, prepare an interim reply. The interim reply will contain as much of the requested information available at the time and will indicate when you will forward the final reply.

g. Forward correspondence requiring approval by the command group prior to dispatch to SGS Admin at least 5 working days prior to the higher headquarters' suspense date.

Transfer of Actions

a. If you receive an action that you think should be assigned to another staff agency, inform the deputy principal or deputy director before attempting to transfer the action. Next, obtain the concurrence of the staff agency that you believe has proponency. If both agencies mutually agree to the transfer, notify the SGS of the transfer.

b. If the action officer cannot resolve assignment, refer the issue to the staff principal or the director prior to involving the SGS. Until a transfer is complete and the new “lead” action agency notifies the SGS, responsibility for the action remains with the staff section to which the SGS initially assigned the action. When referring transfer issues to the SGS, inform the SGS of the reasons for requesting the transfer and the attempts you have made to resolve the issue. The SGS will evaluate the request and will notify the affected staff agencies of the action’s assignment.

Preparation of Staff Actions

a. Prepare all correspondence in formats as prescribed by AR 25-50 and as illustrated in chapter 7.

b. Use letters for correspondence to the President or Vice President of the United States, members of the White House staff, members of Congress, Justices of the Supreme Court, heads of departments and agencies, State governors, mayors, foreign government officials, and the public. Letters may also be used for correspondence to individuals outside the department or agency when a personal tone is appropriate, for official personal correspondence by military and civilian personnel, and for letters of welcome, appreciation, commendation, and condolence.

c. Use the formal memorandum for correspondence that is sent outside the headquarters, the command, the installation, or similarly identifiable organizational elements within the DOD; for routine correspondence to Federal Government agencies outside the DOD; for notification of personnel actions, military or civilian; and for showing appreciation or commendation to DA employees and soldiers.

d. Use the informal memorandum for internal correspondence with subordinate commands to the 52d ID and Fort Riley, with tenant units on Fort Riley, and between units and/or staff elements on Fort Riley.

e. You may also use memorandums to express appreciation and commendation when routed through an individual’s chain of command.

f. While this *Staff Officers Guide* and AR 25-50 discuss the placement of the date on a letter or memorandum, note that these dates are generally placed on the document after it has been signed by the proper authority. Only type the date in if you intend to sign the document immediately or if the signature authority has directed you to do so. Clearly show suspense dates on memorandums as shown in AR 25-50.

Assembling a Staff Action

Assemble the staff action as follows: (Refer to fig 3-1 for an illustration of the staff packet.)

a. Folder. Place the action in a plain manila folder.

b. 52d ID (M) & Fort Riley Form 2039.

(1) Staple the 52d ID (M) & Fort Riley Form 2039 to the front of the folder (the short side of the folder).

(2) The action officer will complete the Subject, Date, Originator/Action Officer, Office Symbol, Telephone, and E-Mail blocks of the header. The action officer will also provide a brief synopsis of the action in the Remarks block, provide the electronic file name(s) of the document(s) in the Electronic File Name block, and establish the routing of the action *excluding the routing through the command group*. If sending the action to the command group, route to SGS.

(3) The action officer's activity will assign and annotate the activity control number in the header to log the action out of the activity.

(4) The SGS will assign the SGS control number and establish the command group routing.

c. Classified Cover Sheet. If required, place the classification cover sheet on top of the 52d ID (M) & Fort Riley Form 2039. Classify each paragraph of the enclosed documents according to the highest classification of the information contained in that paragraph. Classifications are: unclassified (U), confidential (C), secret (S), and top secret (TS).

d. Decision Memorandum. If applicable, the decision memorandum is the first document reviewed. Place the decision memorandum inside, on top of all tabs, on the right side of the folder.

e. Tabs. This paragraph discusses staff action tabbing procedures commonly used. Read AR 25-50, paragraph 4-4, for general information regarding tabbing correspondence procedures. Label tabs with a "Post-it" marker placed on a blank sheet of white paper; place the tabbed white paper in front of the documents being tabbed. Tab lettering is always uniform, as follows:

(1) Tab A, Signature Document. Enclose the signature document as Tab A, on the right side of the folder. Position a "Post-it" signature marker extending off the right side of the page that requires signature. When the action requires more than one signature document (e.g., separate memorandums that implement different courses of action among which the command must choose), show the documents at successive tabs on the right side of the folder and tab them sequentially as "A1," "A2," etc.

(2) Tab B, Tasker. Include the tasker or the document initiating the action as Tab B.

(3) Tab C, Coordination, Statement(s) of Nonconcurrency, and Consideration(s) of Nonconcurrency. If applicable, include these documents, in sequential order, as Tab C.

(4) Tab D, Background Information. If applicable, include any further background material as Tab D.

(5) Additional Tabs. If needed, define additional tabs in the decision memorandum or remarks block of the 52d ID (M) & Fort Riley Form 2039 and label the tabs as Tab E, Tab F, etc.

(6) Tab lettering should always be sequential. For example, if an action did not require Coordination, then Background Information would become Tab C.

f. Landscape Orientation. Assemble enclosures printed using landscape orientation (printed

along the axis of the paper) with the head of the landscape document oriented to the packet's left so when the entire packet is rotated clockwise, the landscape-oriented document is right side up.

g. Clips. Affix the contents to the folder with clips; do not staple. If you use paper clips, place tape over the clip on the outside of the packet to preclude the clips from snagging other documents during transit. If the clip comes into contact with an original document, fold a "Post-it" note over the top of the document prior to placing the clip. The "Post-it" note will protect the original document.

Delegation of Signature Authority

a. Delegation of signature authority by the commander. The Commanding General has delegated his signature authority to staff principals to sign "FOR THE COMMANDER" on correspondence subject to the following provisions:

(1) The correspondence and/or policy must apply to the staff principal's functional area of responsibility as defined in FR Reg 10-3, *Manual of Organization and Functions*.

(2) This delegation does not apply to special interest correspondence, correspondence addressed to or in reply to general or flag officers, or correspondence of exceptional importance which states or changes command policy.

(3) The Director, Directorate of Information Management (DOIM) or his/her authorized representative is delegated command signature authority for correspondence that changes or establishes new policy for the installation staff.

(4) The ACofS, G1/AG or his/her authorized representative is delegated command signature authority for correspondence that changes or establishes new policy for the division staff.

(5) The Chief of Staff is delegated command signature authority for all correspondence leaving the division headquarters, except for where prohibited by a regulation.

b. Delegation of signature authority by staff principals.

(1) Staff principals may also delegate signature authority to sign correspondence that applies to their functional areas of responsibility using their authority lines (e.g., FOR THE ACofS, G1; FOR THE DIRECTOR OF INFORMATION TECHNOLOGY, etc.).

(2) Staff principals may authorize military or civilian employees to sign "for" an official whose name appears in a signature block. Staff principals will delegate this authority in writing for the position(s) in the principal's activity who has the authority. The activity will internally file the delegation memorandum.

Review of Correspondence. Commanders and staff principals, along with their deputies and XOs, are responsible for the content, format, and editing of all correspondence prepared in their respective activities. Carefully review correspondence for correct grammar, spelling, and format prior to forwarding for signature.

Electronic File Transfer System. NOTE: This paragraph is notional and is provided for instructional purposes only. Do not place CAS3 writing requirements on any installation's common drive.

a. General. The J-drive is a common file server for organizational administrators at Fort Riley. DOIM is the network proponent. Request J-drive access through DOIM. Each organization is responsible for maintaining internal J-drive files, to include deleting files no longer required. J-drive documents are not record copies of documents, but rather serve as working copies to process the action through the command group. Do not place classified documents on the J-drive.

b. Procedures. Instead of providing computer disks to the SGS, action officers and organizations may save correspondence for command group signature to the J-drive under their organizational folder, as follows:

(1) Place the J-drive file name in the "Electronic File Name" block of the 52d ID (M) & Fort Riley Form 2039.

(2) If the command group requires only minor changes, the SGS will make changes required by the command group. After a document is finalized and signed by a member of the command group, the SGS will return a hard copy of the document to the originator.

(3) Upon receipt of the hard copy, the originator will delete the file from the J-drive.

Action Officer Tips

a. Put yourself in the shoes of the person signing the action. Does the action answer the five Ws (who, what, when, where, and why)? Without being wordy, what do the decision maker and the recipient need to know?

b. Review corrections made by the command group and share your lessons learned with others.

c. If the SGS returns a staff action for corrections, always include the marked-up copy along with the corrected copy when returning the packet to the SGS.

d. Check on the status of actions with the individual in your activity who assigns the activity control action before calling the SGS.

e. Inform the SGS of time-sensitive actions so that he may assist you in expediting the action through the command group. ***Do not suspense the command group.***

f. Forward an action to the command group only after your chain of command and the SGS have reviewed the action.

g. Log actions into the command group only through the SGS.

h. Take actions out of the command group only after clearing the document with the SGS.

Outgoing Mail

a. Annotate the complete nine-digit zip code (Zip+4) on all outgoing mail.

b. Outgoing mail to HQDA or the Pentagon should have the complete street address and the room number to ensure fast and efficient delivery.

c. Hand-carry all outgoing accountable mail to the CMDB. DOIM is responsible for proper

control and distribution of all incoming and outgoing accountable mail and distribution.

d. Express Mail (USPS Express/Federal Express):

(1) Use express mail next-day delivery service only when next day delivery is absolutely essential to meet mission requirements. Because of the greater cost, do not use express mail for the sole purpose of meeting a suspense date.

(2) Activity deputy directors or executive officers must provide a signed request for use of express mail. Submit the request to the CMDB prior to 1500 to ensure next-day delivery.

(3) Normally, the CMDB will not accept next-day delivery requests on Friday unless the activity has made special arrangements with the recipient for a person to be available on Saturday at the addressee's office to accept custody of the mail.

Electronic Mail (e-mail)

a. E-mail is a powerful tool that can convey messages to a wide audience or a single addressee rapidly. However, e-mail is not meant to totally replace important face-to-face, telephonic, or hard copy communication. The best use of e-mail is to augment other channels of communication.

b. E-mail can be used as the final transmission of official correspondence (taskers, policy directives, memorandums, etc.).

c. Check your e-mail at least twice a day. Remember to call recipients to alert them of time sensitive e-mail traffic.

d. Be brief, concise, and forceful in your messages. Use the military writing style. Work to minimize a message to only the visible space on the computer screen; avoid having the reader scroll or page down. If you have a lot to say, pass the message in an attached electronic file information paper or fact sheet. Format your e-mail logically, use the same rules for preparing the body of an informal memorandum. Use conventional capitalization and punctuation. Do not use all capital letters.

e. Be sure you are not misunderstood. The message is just words; it cannot convey body language, speech inflection, or actions that provide clues to your mood when you speak face-to-face. Review your messages carefully before you send them; use edit and spell check before sending. Use bold face to emphasize or convey stronger emotions.

f. Watch what you say. Consider any message you type and send to be in the public domain, unless you specifically tell the recipient not to forward the message to anyone else. If in doubt about message content, add a "DNR" (Do Not Retransmit) to the end of the message to indicate that you do not authorize the recipient to retransmit. Be aware that information contained in e-mail messages is information obtainable under the Freedom of Information Act.

g. Send messages only to those individuals that have a need to know. Do not clutter the system with junk mail; this ties up network resources unnecessarily.

h. Avoid sending file attachments to more than a few recipients and ensure that the size of the file attachment is small. To share large files and briefing charts, use the commonly shared file server or public folders. When transmitting correspondence as attachments to e-mail notes, add the words

“Signed” or “Signed by . . . for” to the signature block. If the document has not been signed, indicate that the document is “DRAFT” at the top and bottom of each page.

i. Use the high priority and registered mail features judiciously. Both features are useful but can clog the system. Compress large attachments using WINZIP software.

j. When forwarding e-mails that have passed through several recipients, delete unnecessary addressee information and message traffic unless it is critical to the message. Reduce the amount of useless “scrolling” for the reader.

k. When sending an attachment, provide a short summary of the attachment. The EXSUM format will suffice. P

Staff Coordination

Part



4 Staff Coordination

Definition of Coordination

Coordination is a systematic way of communicating, integrating, and managing information. Coordination is the means by which an action officer not only notifies all agencies that are involved in, concerned with, or affected by an issue or proposed action, but gives these agencies an opportunity to comment, concur, or nonconcur. Nearly every action requires some form of coordination, whether internal to your activity or with other activities.

Purposes of Coordination

Staff officers coordinate to:

- a. Acquire and provide information.
- b. Ensure complete and coherent actions.
- c. Avoid conflict and duplication.
- d. Uncover blind spots and omissions.
- e. Consider all aspects of an issue or action.

Learning Coordination

As a newly assigned staff officer, quickly learn how to coordinate within the 52d ID and Fort Riley by--

- a. Observing what is going on around you.
- b. Finding out who the key action officers are in your organization and in other activities.
- c. Studying key organizational documents, such as the organization's mission statement, the *Staff Officers Guide*, the *Manual of Organizations and Functions* (FR Reg 10-3), your activity's files, current actions, etc.

Coordination Methods

- a. Informal coordination comprises the vast majority of our coordination and includes coordination done verbally, telephonically, or via e-mail.
- b. Formal coordination solicits final comments from concerned activities and includes coordination done by memorandum, official correspondence, staffing documents, and briefings.
- c. Coordinate by the quickest and most informal method appropriate to an action and its classification.

Initial Coordination

- a. Assemble the package with your draft document as if it was going to the decision maker for decision. Include copies of any supporting documents; do not include the originals.

b. Coordinate within your activity or office to gain the activity's position instead of the action officer's position. Do not show internal coordination on any transmittal documents.

c. Determine who has interest in the action and set the coordination sequence. Parallel coordination is the most time-efficient means of coordinating and is appropriate for most actions. Use in-turn coordination for the more controversial actions for which activities may not concur. Set the coordination sequence such that the activities that have the most interest in the action are able to comment on the action first. In this way, should their comments warrant significant changes to your action, you will not have to re-coordinate the revised action with the less interested activities.

d. The staff activity responsible for the action may establish a suspense date for coordination within the 52d ID and Fort Riley. See paragraph 3-7*c* for guidance on establishing suspense dates.

e. Send out the package.

Analysis of Responses

a. If all activities concur and comments don't require major revision, revise the draft and send the final document to the decision maker. If respondents submit negative comments or nonconcurrences, you may have to coordinate a revised draft.

b. If an activity does not concur or concurs with negative comments, try to resolve the disagreement informally. Be objective; the activity may have a valid concern. Recognize your specific duties in the context of the division's or installation's mission. If you cannot resolve the disagreement, prepare a consideration of nonconcurrency statement (described in chap 7). Judge whether the comment merits discussion in the final document.

c. Resolve nonconcurrences at the action-officer level; should this fail, attempt to resolve the issue at successive levels of authority prior to formally submitting a statement of nonconcurrency.

d. If a staff activity fails to respond to a laterally imposed suspense by the date specified, the initiating staff activity must coordinate with the staff principal by the most expeditious means of communication to obtain the input. Consider further lack of response as concurrence with the action.

Final Coordination

a. Resolve or address all nonconcurrences and concurrences with comment prior to submitting the action for decision.

b. After analyzing all comments, making any necessary revisions, and resolving nonconcurrences, assemble your package and send it or brief it to the decision maker.

c. A completed staff action is fully coordinated, has a recommendation, and has an implementing document.

Coordination Tips

a. Hand-carry important or time-sensitive actions. Hand-carrying important actions allows you to inform your boss of the exact status of an action.

b. Coordinate with the right people. Build relationships with counterpart action officers. When you go to another activity for a "chop," make sure you go to the right person. Not everyone is

authorized to chop for the activity. The safest course of action is to deal through your counterpart action officer to determine the proper point of contact.

c. Give recipients a “heads up” through an informal means to expedite the formal coordination process. Try to raise and resolve any conflict by providing draft documents before beginning the formal coordination. Informal coordination can preclude major revisions of the final action.

d. Be considerate and treat everyone graciously. Thank them for their input, regardless of whether they agree with your proposed action.

e. Monitor the status of your action by informally coordinating with the action officer in the activity that has your action for review. Tactfully remind recipients of your timeline and any possible suspense by asking the action officer for his or her activity’s initial reaction to your action.

f. Do not rely on your memory to record the results of your coordination. Develop a system to record the results of your informal coordination (e.g., a staff journal, telephone conversation record, etc.). Prepare a memorandum for record (MFR) to record the results of a briefing.

g. Always keep a copy of your work; the original may disappear.

h. Plan ahead. Milestone your actions using a backward planning sequence. Discipline yourself to meet your milestones. Leave enough time for the command group to act on your action, to make adjustments, an

Briefings

Part



5 Briefings

Types of Briefings

FM 101-5, *Staff Organization and Operations*, defines four types of briefings and purposes:

- a. The information briefing is used to inform the listener and to gain his or her understanding. The staff officer will use the format and the associated guidance and tips for the information briefing described in paragraph 5-5.
- b. The decision briefing is used to obtain an answer or a decision. The staff officer will use the format and the associated guidance and tips for the decision briefing described in paragraph 5-6.
- c. The mission briefing is used under operational conditions to provide information, to give specific instructions, or to instill an appreciation of a mission. While many of the principles of the information briefing apply to the mission briefing, the 52d ID's Battle Staff SOP provides the specific format for the mission briefing.
- d. The staff briefing is intended to secure a coordinated or unified effort involving the exchange of information, the announcement of decisions, the issuance of directives, or the presentation of guidance. Depending on the specific topic and situation, the staff briefing may include characteristics of the information briefing, the decision briefing, and the mission briefing.

Responsibilities

- a. Secretary of the General Staff (SGS):
 - (1) Schedules the use of the Command Conference Room (CCR). The CCR is normally used only for those events in which members of the command group participate.
 - (2) Informs the action agency of any additional requirements such as read-ahead packets, etc.
- b. Action Agency:
 - (1) Coordinates for the briefing location, the setup of the briefing location, and the operation of the briefing equipment.
 - (2) Coordinates with the SGS when arranging for briefings involving members of the command group.
 - (3) Coordinates with other staff agencies to arrange for subject matter experts (SMEs) to attend, as necessary.
 - (4) Prepares and conducts the briefing, including taking notes during the briefing.

Selection of Visual Aids

- a. General. The action officer should select only those visual aids that will help him or her get the point across clearly and succinctly. He or she should make visual aids that are clear and simple and that clearly illustrate the point being made.

b. Computer-generated presentations. For briefings at the division and installation levels, the computer with a projection device is the preferred briefing method.

(1) *Advantages:*

(a) Easily viewed by a large audience.

(b) Presentation is easily and economically updated.

(c) Can easily highlight key points through the use of color and the application's animation feature.

(d) Easily transmitted electronically.

(e) Can incorporate video, if necessary.

(2) *Disadvantages:*

(a) Requires computer and projection equipment.

(b) Requires electricity.

c. Viewgraph transparencies (VGTs):

(1) *Advantages:*

(a) Easily viewed by a large audience.

(b) Can easily highlight key points on the transparency.

(c) Can revise/write on the transparency.

(d) Local production possible.

(e) Sequence of transparencies can be manually controlled.

(2) *Disadvantages:*

(a) Use of color is expensive.

(b) Distracting when use of white unfiltered light flashes on the screen.

(c) Requires electricity.

d. Chart pack. The chart pack, sometimes referred to as "butcher paper," is one of the most common and simplest visual aids to use, especially at lower levels.

(1) *Advantages:*

(a) Easily prepared.

(b) Portable.

(c) Readily available.

(2) *Disadvantages:*

(a) Bulky—requires an easel or wall for hanging.

(b) Easily torn or damaged.

(c) Audience size is limited.

e. Videotape/DVD. Video provides a means to reproduce motion, with or without sound, and is an excellent medium to use for a demonstration or critique of a technique or procedure.

(1) *Advantages:*

(a) Reproduces motion, with or without sound.

(b) Instant replay capability.

(c) Can be disseminated easily to audiences in a variety of locations.

(d) Can be incorporated into computer presentations for presentation to a large audience.

(2) *Disadvantages:*

(a) Production costs are high for quality video.

(b) Equipment has limited portability.

(c) Audience size is limited if using a television without special equipment.

(d) Requires electricity.

f. Deskside devices.

(1) *Advantages:*

(a) Easily prepared.

(b) Portable.

(c) Quick revision is possible.

(2) *Disadvantage:* Limited to presentations for one or two persons.

Briefing Tips.

a. Know your audience. Coordinate with other staff officers who have previously briefed the ranking individual in the audience to learn the specific nuances and expectations of the individual.

Coordinate with the SGS, aides, or other staff officers to learn how much the senior officer may know about the subject you are briefing.

b. Know your time limit. A 30-minute briefing means you have 30 minutes to present your briefing and answer any questions. You are not doing the senior officer a favor by announcing that you will only need 15 minutes of a scheduled 30-minute timeframe as you begin your briefing; the senior officer has already set his or her calendar. Similarly, you will rarely be allowed to continue a briefing that has run overtime. If you feel you need more or less time than previously allotted, arrange for a change in time in advance.

c. Prepare for less time. Always be prepared to give the key points of your briefing in less time than allotted should the senior attendee have a sudden schedule change. In some instances, you may have to brief the individual as you walk or ride with him or her to the next scheduled location.

d. Call the senior attendee's office for a final check of his or her schedule. As a minimum, call within 24 hours of the briefing. Know what precedes you and follows you on the schedule to predict possible changes in time.

e. Rehearse. Proper rehearsal allows you to present a smooth briefing with minimal stumbling, with good eye contact, and in the time prescribed. Rehearse in front of other officers to gain feedback.

f. Preview your briefing aids in the same location you will present your briefing, using the same equipment you will use for your briefing, and sitting in the chair(s) the senior attendee(s) will use. Don't neglect to consider the effects of sunlight entering any windows.

g. Plan for the inevitable. Always have several backup plans in case the electricity goes out, the computer fails, the projection bulb burns out, etc.

h. Prepare for the briefing ahead of time and get your rest. Lack of sleep, lack of rehearsal, and too much coffee and sugar prior to the briefing can contribute to a speech pattern that is too fast and difficult to understand. Remember, you have not communicated effectively until the audience comprehends.

i. Prepare a memorandum for record (MFR) for your files to record what transpired during the briefing. Designate someone from your office to record what the audience's comments were during the briefing.

Information Briefings

Part



6 Information Briefings

Title Slide

52d Infantry Division (Mech) & Fort Riley

**3d Quarter FYww Safety
and
Occupational Health Review
Fort Riley Installation Activities**

Mr. Herbert Smith
Fort Riley Safety Office

52

Quarterly Safety Briefing

1

- Highly recommended that you include a cover slide.
- Arial font is easier to read from a distance than other fonts.
- Use the division standard slide master for all briefings to a member of the command group.
- Mark the slides if classified.
- Offer a verbal greeting and introduction. Don't discuss purpose of the brief on this slide.
- Recognize the senior person(s) by name during the introduction.
- Announce the classification at the start of the briefing.
- Don't present a classified briefing without advance warning to the security manager.

Purpose Slide

52d Infantry Division (Mech) & Fort Riley

Purpose

To inform the Garrison Commander of the safety posture for 3d Qtr, FYww, and the ongoing risk reduction measures for Fort Riley's installation activities.

52

Quarterly Safety Briefing

2

- Clearly state the purpose of your briefing.
- If done right, the slide speaks for itself.
- As a general rule, **do not** read slides; however, you must ensure the audience knows the purpose of your briefing.
- Remember that slides supplement your message and add visual focus. Your briefing and your visual aids work together to communicate your message.
- Adding text or title boxes to the slide master can ensure consistency of format from slide to slide.

References Slides

52d Infantry Division (Mech) & Fort Riley

References

- Army Regulation (AR) 385-10, The Army Safety Program, 23 May 1988
- Fort Riley Regulation (FRR) 385-10, Unit Safety Program and Risk Management, 17 April 20ww
- Army Safety Center (<http://safety.army.mil>)
- Occupational Safety and Health Administration (www.osha.gov)

52

Quarterly Safety Briefing

3

- The “reference” slide provides credibility to your presentation.
- One technique is to explain which references you found to be the most beneficial.
- Another technique is to show the reference document(s) to the audience rather than use a slide; however, if you reference a Web site, use the reference slide.
- When listing a Web site provide the proponent of the Web site. Don’t just list the URL.

Outline

52d Infantry Division (Mech) & Fort Riley

Outline

- Fort Riley Safety Office Goals
- Safety Management System Components
- Accident Profile for 3d Quarter, FYww
- Analysis of Accident Profile
- Safety and Occupational Health Proposed Inspections
- Anticipated “High Risk” Training Events
- Summary
- Conclusion

52

Quarterly Safety Briefing

4

- Give the audience the clear and logical sequence that you intend to follow.
- Do not read the bullets. Summarize the outline with transitions between sentences, highlighting key portions.
- Don't forget to include any special procedures, e.g., films, demonstrations.
- For complicated or long outlines, you may use a nested outline technique. Provide a general outline here and then use supporting outlines later in your briefing as appropriate.
- A technique is to post a copy of your outline for referral during your briefing.

First Point

52d Infantry Division (Mech) & Fort Riley

Fort Riley Safety Office Goals

- Assists with the integration of safety and occupational health (SOH)/risk management
- Conducts SOH/risk management training for all units and activities
- Analyzes accident profiles
- Recommends risk reduction measures

52

Quarterly Safety Briefing

5

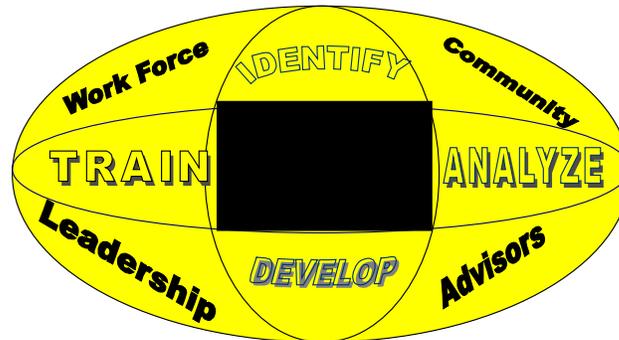
- Start with the first main point. It should coincide with the first main point you showed in the outline.
- Use bullets or other techniques to highlight the key items of your main point.
- Focus the slide content to complement your briefing. Again, the slide should augment the briefing, not vice versa.
- Don't overcrowd your slide. As a rule of thumb, use no more than five to seven lines.
- Don't forget to transition to the next slide. Develop deliberate transitions that help your audience stay on track with you. A good transition will tie the content of one slide to the content of the next slide.

Second Point

52d Infantry Division (Mech) & Fort Riley

Safety Management System Components

- Emphasize system integration
- Implement successful countermeasures



- Train leaders-the key to success

52

Quarterly Safety Briefing

6

- Tell your audience about your second main point.
- Again, logically develop the point.
- Use your imagination when creating slides. You may use graphics or animation in your presentation; however, have a purpose for the visual aid. Visual aids should complement your briefing, not draw the audience away from you.
- Don't forget you need another transition.

52d Infantry Division (Mech) & Fort Riley

Profile for Activities-3d Qtr, FYww

(1 of 2)

Activity Category	DEH	DOIM	DPTM	DOL	DPCA	DSEC	Other	Sub- Total
Class A	1	0	0	0	0	0	0	1
Class B	2	0	0	13	0	1	0	16
Mech Failures w/ Damages	5	1	11	18	6	3	6	50
Total # of Accidents & Failures	8	1	11	31	6	4	6	67

52

Quarterly Safety Briefing

7

- If you choose to use tables, line and block diagrams, or other graphic techniques, make sure the audience can read the information.
- Common errors include using font sizes that are too small to see from a distance and using colors that contrast poorly (e.g., red on blue, blue on black, etc.).

52d Infantry Division (Mech) & Fort Riley

Profile for Activities-3d Qtr, FYww

(2 of 2)

Analysis:

- Accidents increased: 35 in 2d Qtr, FYww
 67 in 3d Qtr, FYww
- DOL had an increase in accidents with 5-ton DeLorean 500 truck fleet.
- DOIM accident rate is an “all-time” low.

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Quarterly Safety Briefing

8

- Notice that this slide is a continuation of the previous slide; therefore, label the title as “2 of 2.”
- Tables and graphs are powerful tools; however, without the **analysis** (or the “so what?”), then the table or graph is useless.
- You are almost finished. Develop this and any other main points the same way you did the first two.
- Follow your outline.
- Don’t forget you need a transition into your summary. Avoid an abrupt transition, e.g., “In summary,”

52d Infantry Division (Mech) & Fort Riley

Summary

- Accidents increased for installation activities.
- Training leaders to identify and mitigate risks is key to reducing accidents.
- Key concerns for the coming quarter:
 - Cold weather.
 - High risk training events (e.g., CALFEX).
- Safety Office is available to assist.

52

Quarterly Safety Briefing

13

- Summarize the major points of the briefing; then ask for questions.
- The summary is the opportunity to emphasize the essential points of your briefing. Do not rush through this slide.
- Make sure your audience knows that you welcome their questions.
- Keep your audience's attention throughout the questions and ensuing discussion. A few techniques include:
 - Repeating questions in a large auditorium.
 - Addressing the entire audience during your answers.
 - Inserting an all-black slide (giving the effect that the screen goes blank) or a questions slide after the summary slide.
- Do not forget that you still have a conclusion to make.

52d Infantry Division (Mech) & Fort Riley

Conclusion

“Our goal is to provide the 52d Infantry Division (Mech), its soldiers, and civilians with the best resources for risk analysis and risk reduction. Make safety a way of life for this command.”

MG Starrs
Division Commander
12 August 20ww

52

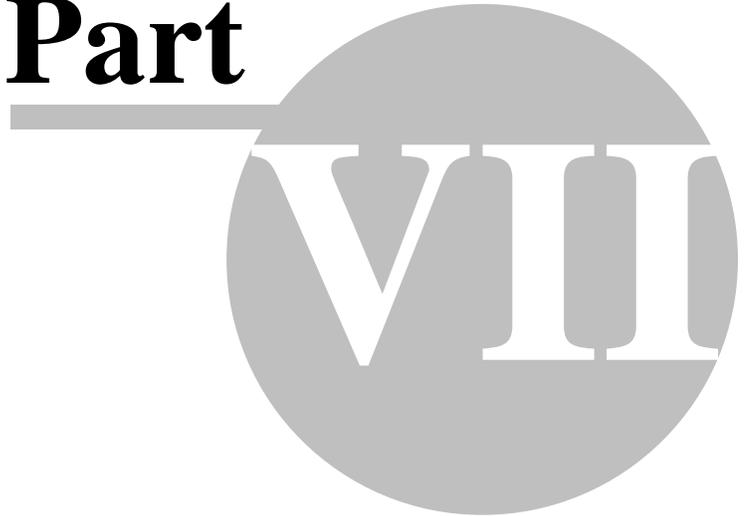
Quarterly Safety Briefing

14

- **Be brief, be clear, be gone.**
- After you have invited and answered any questions, you must conclude the briefing. The conclusion may be verbal. Some of the best are.
- You may have a conclusion slide. This could be your most important slide--it's what you want your audience to remember about your briefing.
- The conclusion could be a famous or not-so-famous quote or maybe even the bottom line of your briefing.

Decision Briefings

Part



7 Decision Briefings



- The briefing title should be prominent on the cover slide only.
- The cover slide is an appropriate place for a graphic symbol like your unit crest, a tank, motto, slogan, etc.
- Center the classification at top and bottom, if required.
- If you are briefing in a senior officer's office, knock, report, and then state who you are and why you are there.
- Ask for permission to set up the briefing.
- If you are briefing in a conference room setting, know your surroundings; sometimes you have to set up the room to best accomplish your briefing.
- Do not discuss the purpose of the briefing on the cover slide. Use for introduction only.

52d Infantry Division (Mech) & Fort Riley

Purpose

To gain your decision on the best 5-ton cargo truck for Fort Riley to purchase during FYyy to replace the Directorate of Logistics' aging fleet.

52

Generic Decision Briefing Format

2

- State the reason why you are there--in other words, you are trying to gain a decision or concurrence.
- Change the word “decision” or “concurrence” in the body of the slide depending on your purpose.
- Adding text or title boxes to the slide master can ensure consistency of format from slide to slide.
- Don't read the slides; paraphrase them.
- Make eye contact. Observe the body language of the individual you are briefing and adjust your delivery accordingly. Watch for cues that your audience is ready to move to the next slide.
- If you are doing a deskside briefing, watch the notebook lean and do not hide behind the notebook.
- Transition to the problem slide.

52d Infantry Division (Mech) & Fort Riley

Problem

To determine the best 5-ton cargo truck for Fort Riley to purchase during FYyy to replace the Directorate of Logistics' aging fleet.

52

Generic Decision Briefing Format

3

- State the problem statement in the infinitive (i.e., "To . . .").
- Be short, concise, and to the point. Use active, action words when possible.
- The problem addresses your goal or desired outcome, not a symptom of the problem.
- Normally include the *who*, *what*, *when*, and *where*, if pertinent.
- Transition to the recommendation slide.

52d Infantry Division (Mech) & Fort Riley

Recommendation

Navistar Model NVD440 is the best truck for Fort Riley to purchase during FYyy.

52 *Generic Decision Briefing Format* 4

- State what you want to do; the recommendation slide can be in either a sentence or fragment format.
- Answer the problem posed by the problem statement; use one focused idea that is limited in scope, clear, and simple.
- Word the recommendation similarly to the problem statement by blending in the COA to answer the problem.
- The recommendation agrees with the conclusion.
- The slide should stand alone; however, the decision maker will want to hear your recommendation from you.
- Transition to the coordination slide.

52d Infantry Division (Mech) & Fort Riley

Prior Coordination

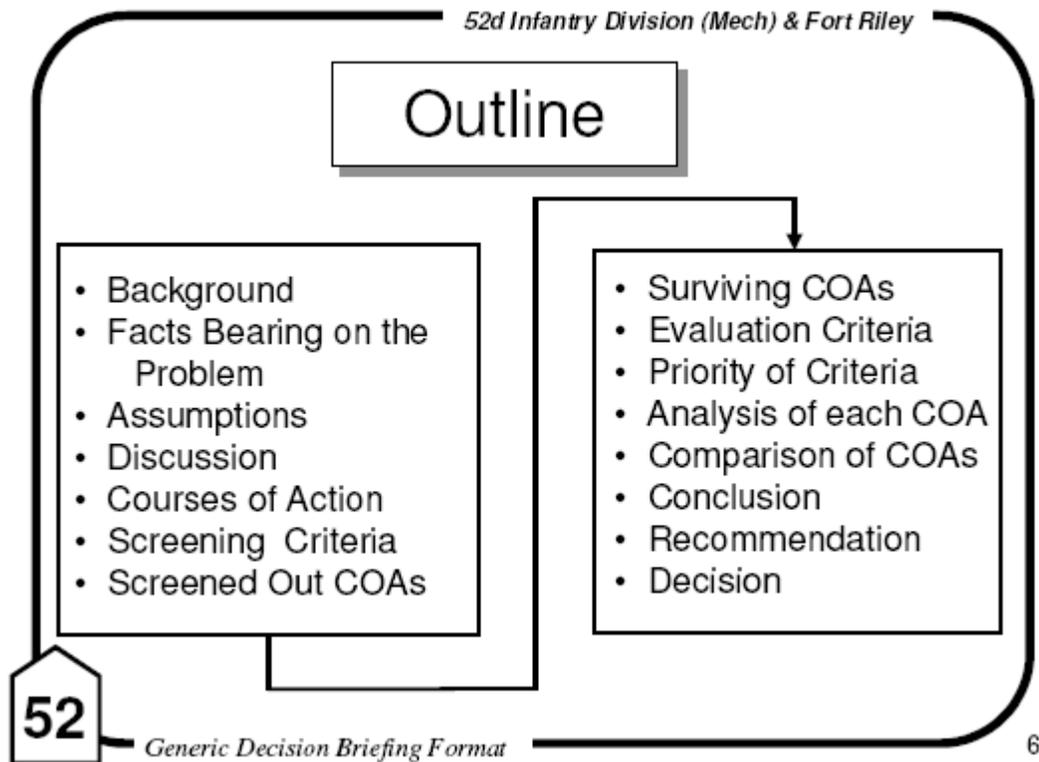
<u>Unit/Person</u>	<u>Results</u>
DOL, Mr. Counts	Concur
DEH, Mr. Diller	Concur
DPTM, Mr. Hellion	Concur
Safety, Ms. Nelson	Concur
CPO, Mr. Cleaver	Nonconcur

52

Generic Decision Briefing Format

5

- In a conference setting, this is a good time to introduce your staff if they are present. You may also introduce them when you introduce yourself.
- As you coordinate your briefing, someone may not concur. Ideally, resolve all nonconcurrences prior to giving the briefing to the decision maker; however, in rare instances when you cannot, be ready to explain why an individual may not concur.
- The decision maker may be surprised by someone else's concurrence. Be ready to elaborate on that as well.
- Transition to the outline slide.



- A handout of the outline may help the audience stay on track.
- Do not read the bullets; write planned transitions on your copy of the slide.
- The outline slide should be on one page, as shown. Your presentation medium, however, may require you to use two pages for readability. Recognize that the one-page format is an exception to the general rule of five to seven lines per slide.
- Note that the discussion slide is an optional slide. If you do not need the discussion slide, delete the discussion bullet from the outline.
- Transition to the background slide.

52d Infantry Division (Mech) & Fort Riley

Background

- DOL's 5-ton truck fleet of 14 trucks averages 28 years old.
- Safety and reliability are decreasing.
- Maintenance costs are increasing.
- The Garrison Commander directed a study to determine the best replacement 5-ton truck.

52

Generic Decision Briefing Format

7

- Speak with conviction.
- Answer the questions:
 - Why am I here?
 - Why does the problem exist?
- Do not bore the audience with unnecessary background facts.
- Transition to the facts slide(s).

52d Infantry Division (Mech) & Fort Riley

Facts Bearing on the Problem

(1 of 4)

Garrison Commander:

- Local purchase if possible.
- Is concerned most about initial cost.
- Also wants a low OPTEMPO cost.
- Prefers driver-side air bag for safety.

DOC:

- New vehicle must conform to Buy American Act ($\geq 50\%$ American).

52

Generic Decision Briefing Format

8

- List facts that bear on all courses of action, not raw data facts for a particular COA. For example, list the guidance that cost is a concern, but do not list that the GM truck costs \$30,000. You will discuss raw data thoroughly during COA analysis.
- Use statements of undeniable fact that influence the problem or its solution.
- Factual data must stand alone; either it is a clear fact or is attributed to a reputable source that asserts it true.
- Sources of facts include:
 - Commander's guidance.
 - Higher headquarters' directives.
 - Subject matter experts.
 - Law and regulations.
 - Other references.
- If you have more than one fact slide, announce how many slides you have and annotate in the title.

52d Infantry Division (Mech) & Fort Riley

Facts Bearing on the Problem

(2 of 4)

DOL:

- Prefers warranty \geq 2 years (current standard).
- Thinks annual repair part costs for new vehicles will be less than current annual repair part costs.
- States that miles per gallon (MPG) is major component of OPTEMPO cost.
- Has to install more fuel storage tanks if MPG $<$ 12.

52

Generic Decision Briefing Format

9

- Facts can help you limit the scope of solutions considered.
- Guidelines for briefing slides:
 - Use bullets: five to seven words per line as a general rule.
 - Don't crowd: five to seven lines per slide as a general rule.
 - Construct the slide so the bullets are parallel (e.g., DOL prefers, thinks, states, and has).
 - Be consistent in using the same font size and style.
 - Make sure the slide supports the briefing.

52d Infantry Division (Mech) & Fort Riley

Facts Bearing on the Problem

(3 of 4)

DEH:

- Additional fuel storage tank will cost \$15,000.

Initial Cost:

- Garrison Commander allocated \$336,000 (\$24,000 per vehicle) from FYyy budget.
- DOL states if MTBF is 132 hours or more:
 - Needs no new maintenance personnel.
 - Saves \$204,400 (\$14,600 per vehicle) and can apply to purchase.

52

Generic Decision Briefing Format

10

- Provide continuity to the briefing by planning transitions from bullet to bullet.
- Well-written bullets often require elaboration, but be careful not to read the facts. Again, watch the body language of the person being briefed.

52d Infantry Division (Mech) & Fort Riley

Facts Bearing on the Problem

(4 of 4)

Initial Cost (cont):

- DOL states it can delay its sedan purchase:
 - Can provide an additional \$76,000 (\$5,400 per vehicle).
 - Truck cannot cost > \$44,000.
 - Prefers cost \leq \$38,600 so we can still purchase sedans.

52

Generic Decision Briefing Format

11

- Group related facts. If a specific order helps build support for your criteria, arrange your facts in that order. Some techniques are:
 - Who said it (CG, G3)--a good technique because it automatically attributes the fact to a source.
 - Category (logistics, transportation, training).
- Transition to assumptions slide.

52d Infantry Division (Mech) & Fort Riley

Assumptions

- Reported vehicle costs stay constant.
- No more funds will become available.
- New annual repair part costs \leq current annual repair part costs.
- MPG and MTBF reflect the majority of OPTEMPO costs.
- "Local purchase" means < 150 miles from Fort Riley.

52

Generic Decision Briefing Format

12

- Assumptions are the conditions we can't verify. A valid assumption would be a fact if current data could prove it.
- Use only assumptions that are valid (fact-based), necessary, and apply to all COAs.
- Use an assumption when a fact isn't available. Assumptions cover information you can't prove but must include to complete the plan.
- Don't assume away the problem.
- Don't confuse facts and assumptions.
 - Fact: Higher HQ says no more money is available.
 - Assumption: We can't get more money.
- Elaborate as required.
- Transition to either the discussion or COA slide.

52d Infantry Division (Mech) & Fort Riley

Discussion

- DOD “Catalogue of Vehicle Maintenance” was used to compute MTBF data.
- All courses of action had:
 - Driver-side air bags.
 - Local vendors.

52

Generic Decision Briefing Format

13

- The discussion slide is an optional slide that you may use:
 - To explain how you narrowed the scope of the problem. If you've been given a broad scope, you may decide to narrow the field of possibilities through application of the process. Use this slide to explain to the decision maker what you did without getting into the minute details. You could also narrow the scope by refining the problem statement and addressing how you narrowed the scope in the background slide.
 - To define technical terms and sources of technical data.
 - To provide brevity by pointing out evaluation criteria that are supported by the facts, but for which all courses of action are equal. These criteria remain evaluation criteria; however, use the discussion slide to explain why the criteria do not appear during the remainder of the briefing.
- Transition to the courses of action slide.

52d Infantry Division (Mech) & Fort Riley

Courses of Action

Navistar: Navistar Model NVD440

Caterpillar: Caterpillar Model CAT325

Ford: Ford Model F660DL

GM: General Motors Model 47Z

Mack: Mack Model 1140

Mercedes: Mercedes Model D550

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Generic Decision Briefing Format

14

- COAs are alternatives which might solve the problem. State where the COAs come from (commander, research, etc.).
- Use a short title for your COA, followed by a definition of what each short title means, if necessary. Use a short title that is related to the definition (e.g., GM, Ford, Caterpillar, etc.). Stay away from using COA1, COA2, COA3, etc.
- Logically sequence your COAs. A **technique** is to list the COAs from best to least preferred. Other alternatives are to list the COAs alphabetically, in the order in which discovered, or numerically (e.g., 1st Bde, 2d Bde, 3d Bde).
- Keep the number of COAs to a reasonable amount. If there are too many, use the technique found on the discussion slide to reduce the COAs.
- If the substance of the COA is not clear from the short title name and a brief definition, you may have to use a slide for each COA that includes a more detailed description.
- Transition to the screening criteria slide.

52d Infantry Division (Mech) & Fort Riley

Screening Criteria

Cost: Must not exceed \$44,000 per vehicle.

Buy American: Must conform to Buy American Act (\geq 50% American).

52

Generic Decision Briefing Format

15

- Screening criteria are the absolute standards that COAs must pass to solve the problem.
- Screening criteria define and measure:
 - Suitability: solves the problem/accomplishes the mission.
 - Feasibility: within available resources.
 - Acceptability: worth the cost or risk.
 - Distinguishability: COAs differ significantly.
- Screening criteria **must** be supported by facts or assumptions.
- State screening criteria (SC) as a “must/must not.” Each must have the following two elements: short title and definition which includes a must or must not have statement. SC are a “go/no go” proposition.
- Transition to the screened out COAs slide.

52d Infantry Division (Mech) & Fort Riley

Screened Out COAs

Mack: fails SC Cost because it costs \$48,000.

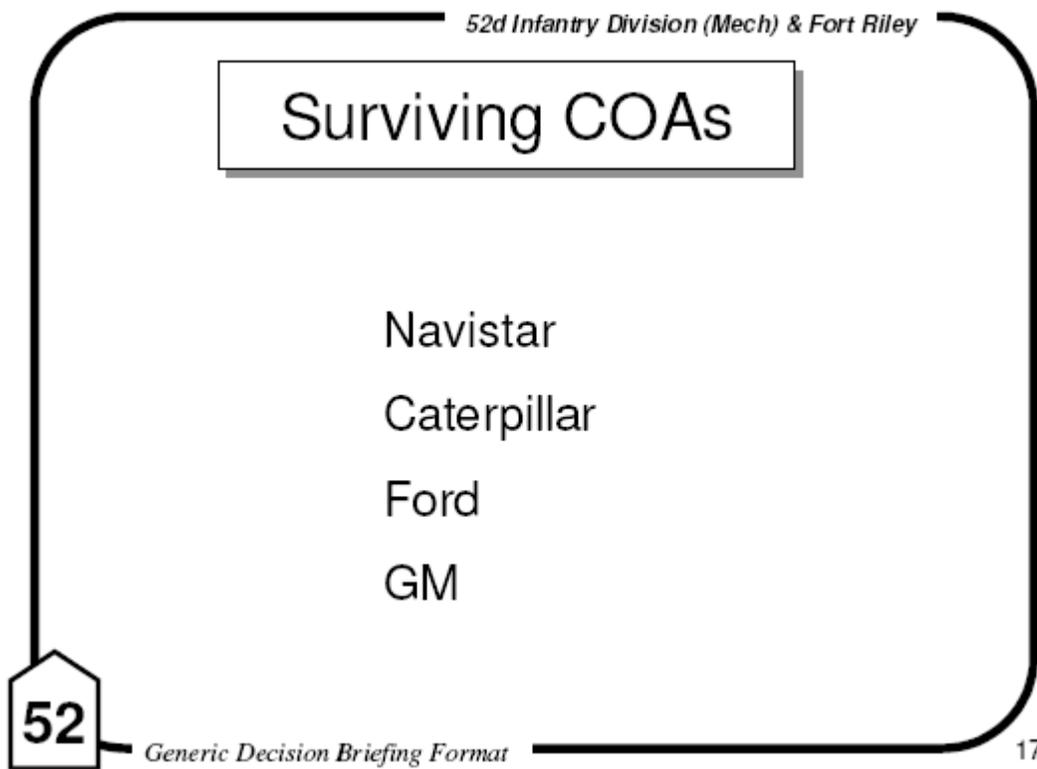
Mercedes: fails SC Cost because it costs \$52,000; fails SC Buy American because it is 27% American made.

52

Generic Decision Briefing Format

16

- Identify the screened out COAs.
- Be consistent with your methodology:
 - List the COAs in the same order as the COAs appeared on your COA slide.
 - List multiple SC for a particular COA in the same order the SC appeared on your SC slide.
- You must state **all** reasons (with supporting raw data) that cause a COA to fail the screening criteria.
- Transition to the surviving COAs slide.



- List the surviving COAs. Again, be consistent with the order.
- You must have at least two COAs left after screening in order to continue your evaluation.
- Transition to the evaluation criteria slide.

52d Infantry Division (Mech) & Fort Riley

Evaluation Criteria

(1 of 4)

Short Title: Cost

Definition: The maximum total cost of each truck

Unit of Measure: Dollars

Benchmark: \$38,600

Formula: \leq \$38,600 is an advantage; $>$ \$38,600 is a disadvantage; less is better

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Generic Decision Briefing Format

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- Use evaluation criteria (EC) to measure, evaluate, and rank order COAs with respect to the desired end state/outcome during analysis and comparison.
- You must support EC with the facts or assumptions.
- Present EC in order of importance. Be able to describe the relative importance of each of your evaluation criteria.
- Include the five required elements for each EC:
 - Short title: allows you to be concise in later portions of your briefing.
 - Definition: leaves no doubt in the briefee's mind as to what you mean. Be precise.
 - Unit of measure: for example, US dollars, feet, etc.
 - Benchmark: generally, the point at which a COA becomes an advantage with respect to a particular criterion. Be able to justify how you came up with the value. Some techniques are reasoning, historical data, current allocation, verbal/written guidance, regulation, tangible benefit, and averaging. Use averaging only as a last resort.
 - Formula: stated in one of two different ways, that "more or less is better" or subjectively in terms such as "disc brakes are better than drum brakes." Always include the benchmark on the advantage side of the formula.
- A well-thought-out benchmark value is essential for precise analysis. You may also include on your slide a reason for the benchmark value.

52d Infantry Division (Mech) & Fort Riley

Priority of Criteria

Cost -- Garrison Commander concern

MPG -- Major contributor to OPTEMPO cost
(Garrison Commander concern)

MTBF -- DOL concern
Also contributes to OPTEMPO cost

Warranty -- DOL concern

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Generic Decision Briefing Format

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- Slides 19, 20, and 21 (the remaining Evaluation Criteria) are not included in this sample briefing. You must have one slide defining each of the evaluation criteria.
- The priority of criteria slide sets the stage for analysis and comparison.
- List the Evaluation Criteria in order of importance.
- Describe why you prioritized each criterion to reflect its relative influence. Key considerations include:
 - Specific commander's guidance.
 - The degree that the criterion influences the desired end state.
- Do not discuss weights here, as weighting is a component of the decision matrix (DECMAT). The DECMAT is not part of the decision briefing format.
- Transition to the analysis of COA slides.

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Analysis of Navistar

Advantages:

MPG -- 20	(\geq 12 MPG)
MTBF -- 150	(\geq 132 hours)
Warranty -- 2	(\geq 2 years)

Disadvantages:

Cost -- \$42,000	(\leq \$38,600)
------------------	--------------------

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Generic Decision Briefing Format

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- You must have one of these slides for each of your surviving COAs. Slides 24, 25, and 26 (analysis of the remaining COAs) are not included in this sample briefing.
- Be consistent:
 - Order the analysis slides in the same order as your COA slide.
 - List the EC in order of precedence from most important to least important for both the advantage and disadvantage category.
- Always include an advantage and disadvantage category. If the COA has no advantages or disadvantages, state None.
- List all EC as either an advantage or disadvantage for each COA. Avoid neutral categories; set the benchmark so the advantage includes the benchmark number. For example, the benchmark for cost is \$38,600.
 - A cost of \$38,600 or less is an advantage.
 - A cost of more than \$38,600 is a disadvantage.
- Account for **all** EC: # advantages + # disadvantages = # EC
- Consistently show both the raw data and the advantage formula for each EC. Don't beg the question as to why an EC is an advantage or a disadvantage. Verbally point out that the formula is the advantage formula.
- Transition to next analysis of COA slide or to the comparison of COAs slide.

52d Infantry Division (Mech) & Fort Riley

Comparison of COAs

Evaluation Criteria (Advantage Formula)	Courses of Action (Raw Data)						
Cost (\leq \$38,600)	GM (\$30,000)	>	Ford (\$34,000)	>	Caterpillar (\$40,000)	>	Navistar (\$42,000)
MPG (\geq 12 MPG)	Navistar (20 MPG)	>	Caterpillar (15 MPG)	>	Ford (12 MPG)	>	GM (8 MPG)
MTBF (\geq 132 hours)	Navistar (150 hours)	>	Caterpillar (140 hours)	>	GM (135 hours)	>	Ford (130 hours)
Warranty (\geq 2 years)	Caterpillar (4 years)	>	Navistar (2 years)	=	GM (2 years)	>	Ford (1 year)

> Means better than.

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Generic Decision Briefing Format

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- The comparison slide provides a snapshot of which COA is the best. Compare each COA to one another for each EC.
- Explain what your symbols mean. Keep them straight in your own mind. It may help to have notes on your side of the desk briefing.
- Some techniques you may use are illustrated in the above slide:
 - Note how the symbols are all aligned vertically.
 - List the EC in the same order as you previously defined them.
 - Explain that the “greater than” symbol for COAs means “better than.”
 - List the COAs from left to right in order from best to least preferred for *each EC*, not in order of your overall recommendation. In the case of a tie, show the overall recommended COA to the left side of the equal sign, if applicable.
 - Highlight the recommended COA no matter where it shows up in the comparison.
 - You must explain at least the first criterion; the rest are self-explanatory.
 - Provide the advantage formula and raw data to limit questions.
- Transition to the conclusion slide.

52d Infantry Division (Mech) & Fort Riley

Conclusion

The Navistar Model NVD440 truck is the best 5-ton truck for Fort Riley to buy. Although it is initially more expensive, Navistar offers low OPTEMPO costs with the highest MPG and MTBF rates. Navistar also offers the desired warranty period.

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Generic Decision Briefing Format

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- The conclusion is an extremely important slide that combines the analysis and comparison in a way which objectively sells your recommendation.
- Summarize your conclusion in paragraph form. You must address all of your EC in your conclusion.
 - Use superlatives when appropriate (e.g., the best, the most, etc.), drawing on positive comparisons.
 - Use words such as “adequate” or “good” to incorporate elements of analysis where the COA is advantaged for a particular EC.
 - Explain the disadvantages as positively as possible and in a way that makes it clear that the advantages outweigh the disadvantages. A technique that can be helpful is to link a disadvantage EC (e.g., initial cost) to a related advantage EC (e.g., future OPTEMPO cost).
- **Do not introduce** new EC in your conclusion.
- You must convince without reference to the DECMAT. Convince with a logical argument.
- Ask for questions.
- Transition to recommendation slide.

52d Infantry Division (Mech) & Fort Riley

Recommendation

Navistar Model NVD440 is the best truck for Fort Riley to purchase during FYyy.

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- The recommendation slide here matches word for word your recommendation slide at the beginning of the brief.
- **Ask for a decision or concurrence**; have any required paperwork ready for signature.
- Keep this slide up until you have a concurrence or decision.
- Be prepared to show your Raw Data Matrix, DECMAT, EC weights with the pairwise comparison, sensitivity analysis, and consistency ratio. Be able to explain each.
- Thank the decision maker, salute, and leave.

52d Infantry Division (Mech) & Fort Riley

Raw Data Matrix

Criteria COA	Cost (\$1000s)	MPG	MTBF	Warranty	Driver Air Bag	Local Vendor	Buy American
Navistar	42	20	150	2	Yes	Yes	66
Caterpillar	40	15	140	4	Yes	Yes	78
Ford	34	12	130	1	Yes	Yes	82
GM	30	8	135	2	Yes	Yes	86
Mack	48	19	160	3	Yes	Yes	88
Mercedes	52	21	185	4	Yes	Yes	27

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- The raw data slide is a backup slide.
- The raw data matrix contains the raw data for all original COAs (screened out and surviving) and all criteria (evaluation and screening).
- Note that EC removed on your discussion slide remain EC. List them in the raw data matrix in case the raw data changes prior to execution of the decision.
- A raw data matrix succinctly organizes the facts and data you have about each COA and serves as an addendum to the facts bearing on the problem slide.
- You may wish to highlight the raw data of a COA that fails screening criteria.

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Weighting of Criteria

Cost > MPG > MTBF > Warranty

Cost is slightly favored over MPG.
Cost is strongly favored over MTBF and Warranty.
MPG is strongly favored over MTBF and Warranty.
MTBF is slightly favored over Warranty.

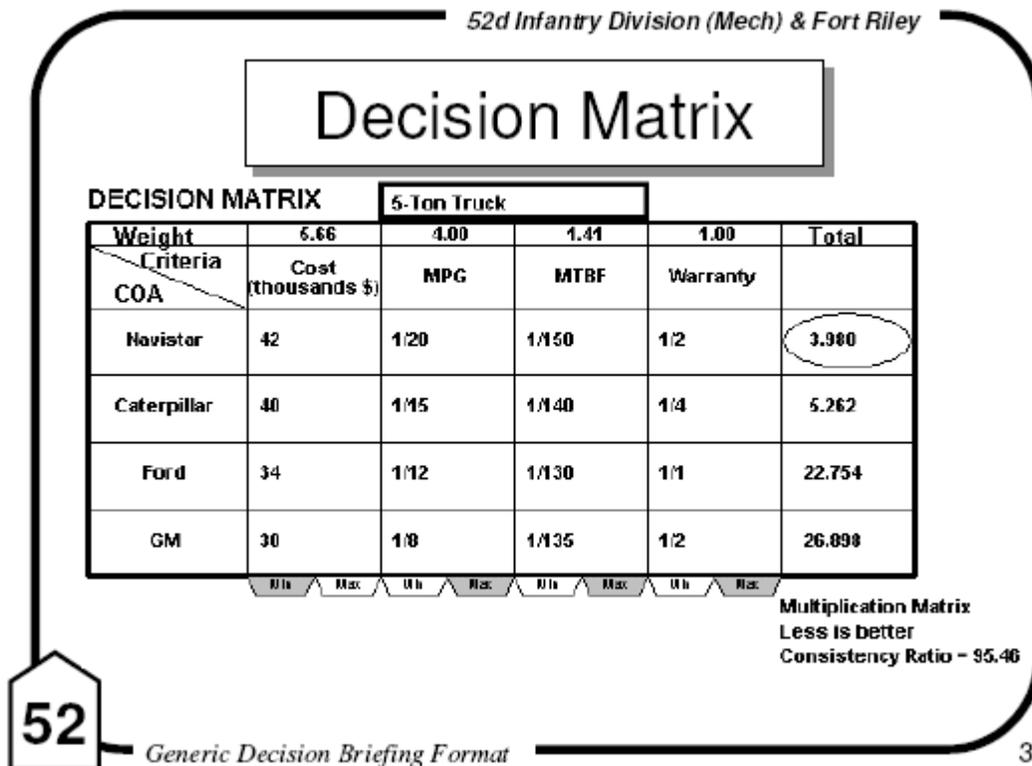
> Means better than

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Generic Decision Briefing Format

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- The weighting of criteria slide is also a backup slide.
- You may use this slide to explain the relationship between criteria (pairwise comparison).
- Graphically portray the criteria from the most important to the least important. Use only greater than or equal signs to portray your string.
- Use the same EC titles as in the rest of your briefing.
- Describe why you weighted each criterion to reflect its relative influence on your desired end state/outcome as you explained on the priority of criteria slide.



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- The decision matrix (DECMAT) is not part of the decision briefing format.
- Have your DECMAT handy, but don't include as part of briefing. Use it as a backup slide. You may create your own matrix or use the computer-generated matrix.
- Give matrix a short title related to your problem.
- Identify the matrix as either a "relative value" or "multiplication" matrix, as appropriate.
- Label the matrix with "less is better" as used in DECMAT.
- Label the COAs and criteria with the same short titles you defined earlier in the briefing.
- Note that the DECMAT is a comparative tool. In rare instances where a particular COA exceeds more benchmarks than the other COAs, the DECMAT results may differ from the conclusion you reach through analysis. You must decide whether you should recommend on the basis of analysis or comparison.

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Sensitivity Analysis

Cost: Not Sensitive

MPG:

Changes at 3.02; Optimal is Caterpillar

Changes at 1.40; Optimal is GM

MTBF: Not Sensitive

Warranty:

Changes at 1.41; Optimal is Caterpillar

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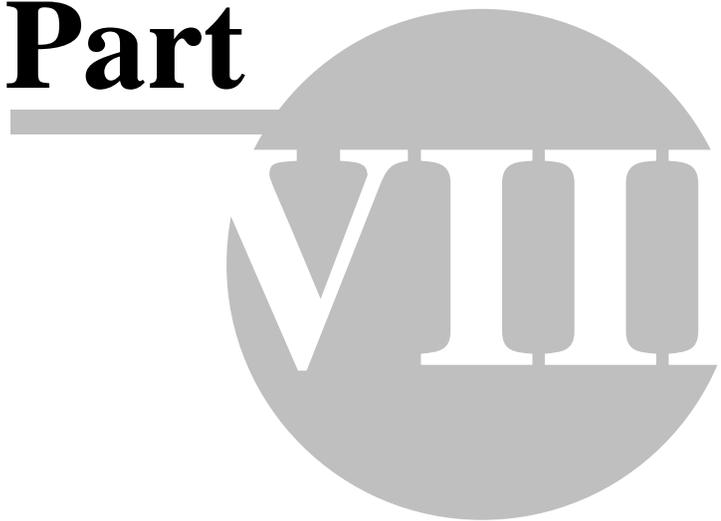
Generic Decision Briefing Format

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- The sensitivity analysis helps you to analyze the DECMAT results.
- Sensitivity analysis identifies the degree to which the DECMAT results are subject to change when a weight changes.
- A sensitive solution is not “bad,” but simply shows that:
 - The DECMAT has identified two nearly equal solutions (e.g., in the above instance, the Caterpillar is very close to the Navistar).
 - Analysis will be more important than comparison (DECMAT).
 - The decision maker may have to rely more on the art of command than the science of the DECMAT.

Meetings

Part



8 Meetings

General

Because meetings are often managed incorrectly, meetings can easily become the number one time waster of a command and its staff. Staff officers will follow the guidelines of this chapter to help them use time more efficiently.

Types of Meetings

a. The informational (or instructional) meeting is used to provide information. The group does not seek a decision. The meeting may take a formal nature, as in a briefing, or an informal nature, where the group discusses a series of topics. Most staff meetings are informational meetings.

b. Problem-solving and decision-making meetings provide the forum to bridge the gap between what is happening and what the group wants to happen in the future. The leader decides whether the meeting is a decision-making meeting prior to scheduling the meeting. The problem-solving meeting does not end in a decision, but is a meeting that the group conducts prior to the decision-making meeting.

Scheduling a Meeting

Staff officers should carefully decide whether to have a meeting and who should attend.

a. Have a meeting when:

- (1) The group needs to receive information or provide advice.
- (2) The group needs to be involved in the problem-solving process.
- (3) Members of the group have information to share.
- (4) The group desires to discuss an issue with the leader.
- (5) Regulations or policies require a periodic meeting.

b. Do *not* have a meeting when:

- (1) More efficient ways to communicate exist (e.g., telephone, memorandum, or e-mail).
- (2) Poor or inadequate data or preparation exists.
- (3) The leader has already made up his mind. A meeting to share the boss' thoughts is acceptable; however, do not have a meeting with the idea of making a decision when the boss has already decided.
- (4) The subject is highly classified or involves sensitive or personal information.

Planning a Meeting

Plan the meeting prior to its assembly using the "N.E.A.T.E.R." model as a tool to increase the meeting's efficient use of time.

- a. **Nature**—what is the purpose of the meeting and what type of meeting is appropriate?
- b. **Expectations**—as the meeting planner, consider:
 - (1) Who should attend?
 - (2) What should the participants expect or be prepared to do?
 - (3) What is the desired outcome?
 - (4) What process will the group use to reach its desired outcomes?
 - (5) Who will make any required decisions?
- c. **Agenda**—prepare and disseminate the agenda in advance, with input from all participants. The agenda will outline:
 - (1) The purpose of the meeting.
 - (2) All known topics and who has responsibility to prepare each topic.
 - (3) Time allocated for each topic.
- d. **Time**—set the total time for the meeting after considering:
 - (1) When is the best time for the group discussion?
 - (2) What is the expected attention span of the attendees at the scheduled time?
 - (3) What is the impact of the considered time on other units or people?
 - (4) Can you assure the meeting's length by “backing it up” against another event?
- e. **Extra Resources**—consider what administrative and logistical support you need for your meeting. Brainstorm your needs on the basis of “what can go wrong will go wrong” by considering:
 - (1) Audiovisual equipment, training aids, and spare bulbs.
 - (2) Meeting location and space.
 - (3) Chairs, tables, easels, blackboards, etc.
 - (4) Recording materials such as paper, chart packs, pens, markers, chalk, etc.
 - (5) Sufficient copies of all handouts.
 - (6) The physical layout of the room and the seating arrangement.
 - (7) Refreshments or meals.

Process of a Meeting

a. Informational meeting. The process of the informational meeting follows the agenda of the information briefing described in chapter 5.

b. Problem-solving and decision-making meetings. The problem-solving meeting sequence follows the problem-solving process described in appendix D of this *Staff Officers Guide*. Include four distinct, interactive roles for the conduct of the meeting with the following responsibilities:

(1) Facilitator:

(a) Helps the group stay focused on the issue or problem.

(b) Is responsible for the pre- and post-meeting planning.

(c) Suggests methods and procedures to assist the group through the problem-solving steps.

(d) Stays out of the discussion and remains neutral.

(e) Confronts dominating individuals by pointing out the behavior that is disruptive (e.g., talking too much, telling war stories, etc.).

(f) Draws out quiet or indecisive members by asking questions.

(g) Ask members who may disagree why they disagree and what they would do differently if they could change the situation.

(2) Recorder:

(a) Records all group ideas and thoughts using key words and phrases.

(b) Posts these ideas for all members to view. For complex meetings, the recorder may request permission to use a tape recorder as a backup means of recording information.

(c) Remains neutral.

(3) Group members:

(a) Actively participate in the meeting.

(b) Hold the facilitator and the recorder responsible for their roles in the process.

(4) Chairperson:

(a) Is an active participant and contributes individual ideas.

(b) Is usually the final authority if the process stalls or time expires.

(c) Assists the facilitator in drawing out quieter members.

Publishing Meeting Results

After the meeting, and preferably within 24 hours, the staff agency responsible for the meeting will

publish a short summary of the meeting and provide a copy to all members. The action officer may use e-mail as an excellent means of disseminating the summary. The summary should include:

- a.* The date and time the meeting occurred.
- b.* A list of attendees.
- c.* A summary list of the items discussed. If the meeting included all items on the original agenda, you may attach a copy of the agenda to the summary.
- d.* The name, position, and office of people assigned tasks and the suspense for completion.
- e.* The date and time of the next meeting, if known.

Read-aheads

a. General. Read-aheads are a special type of staff action that prepare members of the command group for meetings, trips, or dignitary visits. The Secretary of the General Staff (SGS) is the point of contact for read-aheads for the command group.

b. Procedures.

(1) Upon request from the command group, the SGS will task the action officer for the read-ahead. A minimum of 2 days prior to the event, the action officer will provide the SGS with one copy of the read-ahead and will place electronic files for the read-ahead's documents on the J-drive (the common drive) per paragraph 3-13 of this *Staff Officers Guide*.

(2) If the read-ahead contains correspondence that the action officer will ask a member of the command group to sign during the meeting, the SGS must first review the correspondence.

c. Format. Format the read-ahead as a complete staff action packet. Prepare an Executive Summary (EXSUM) per chapter 7 of this *Staff Officers Guide*. Place the EXSUM on top of the tabs on the right side of the folder. Place any correspondence you want the command group to sign as the first tab. The second tab will be the original tasker and the third tab will include any concurrences, nonconcurrences, and consideration of nonconcurrences, if appropriate. For briefings, insert a point paper and a copy of the briefing slide as the fourth tab.

Correspondence

Part



9 Correspondence

General

a. AR 25-50, *Preparing and Managing Correspondence*, establishes the basic formats for standard Army correspondence: the informal memorandum, the formal memorandum, and the letter.

(1) Informal Memorandum. Use the informal memorandum format for routine correspondence internal to organizations within Fort Riley and the 52d ID (M).

(2) Formal Memorandum. The formal memorandum is used for correspondence that is sent outside the headquarters, the command, the installation, or similarly identifiable organizational elements within the DOD; for routine correspondence to Federal Government agencies outside the DOD; for notification of personnel actions, military or civilian; and for showing appreciation or commendation to DA employees and soldiers. Use the formal memorandum for correspondence sent off the installation and for policy documents. You may also use the formal memorandum for personal correspondence sent through the chain of command to individuals.

(3) Letters. Use letters for correspondence to the President or Vice President of the United States, members of the White House staff, members of Congress, Justices of the Supreme Court, heads of departments and agencies, State governors, mayors, foreign government officials, and the public. Letters may also be used for correspondence to individuals outside the department or agency when a personal tone is appropriate, for official personal correspondence by military and civilian personnel, and for letters of welcome, appreciation, commendation, and condolence.

b. This *Staff Officers Guide* does not supplement or modify the basic regulation for use of these formats. This *Guide* provides guidance and tips regarding the preparation and use of the standard Army formats, as well as the preparation and use of other types of documents internal to Fort Riley and the 52d ID (M).

c. Action officers are responsible for the complete staff action to include: proper use of grammar, spelling, and punctuation; and compliance with standard format guidance.

d. DA Pamphlet 600-67, *Effective Writing for Army Leaders*, provides specific instructions on effective Army writing that transmits a clear message in a single, rapid reading and is generally free of errors in grammar, mechanics, and usage.

Correspondence Standards

a. The correspondence standard for Fort Riley and the 52d ID (M) is Microsoft (MS) Word, Times New Roman 12 font, left justification.

b. Generally speaking, margins are 1 inch left, right, top, and bottom. However, letter and letterhead margins can be different. Look up the margin requirements for each type of document in AR 25-50 and in this *Staff Officers Guide*. Adjust the default settings in Microsoft Word as appropriate.

c. Print documents on a laser-quality printer.

d. Decision makers may make pen and ink changes for minor errors only on internal documents. Staff officers should never assume that a pen and ink change is acceptable when presenting a document for signature.

Citing References

a. References help the addressee of the correspondence in obtaining additional information. References also help the writer achieve brevity by referring the addressee to other documents for the minute details. If you use a reference:

- (1) Include the reference paragraph as the document's first paragraph.
- (2) Include the date of referenced publications.
- (3) Italicize or underline the titles of referenced publications.
- (4) Enclose the reference if the addressee cannot readily obtain the document.

b. Examples of references:

- (1) For a publication: AR 25-50, *Preparing and Managing Correspondence*, 5 Mar 01.
- (2) For a memorandum: Memorandum, HQ 52d ID (M) & Fort Riley, ABCA-CS, 10 Jun xx, subject: Promotion Lists.
- (3) For a telephone conversation: Reference telephone conversation between COL Green, this office, and COL White, III Corps, 10 Jun xx, subject: Promotion Lists.

Use of Office Symbols

The office symbol at the top or bottom of correspondence and other documents will identify the specific office that prepared, filed the record copy, and has the most detailed knowledge about the subject. Refer to 52d ID (M) & FR Memo 340-9 for authorized office symbols.

Use of Acronyms and Abbreviations

a. Memorandums. Use abbreviations authorized in AR 310-50. Use standard dictionaries for abbreviations not contained in AR 310-50. Abbreviated ranks are authorized for memorandums and personal correspondence. General officers will use their full rank on all formal or official correspondence.

b. Letters. Use only common abbreviations found in standard dictionaries. Do not use military abbreviations, acronyms, or military jargon in letters addressed to persons outside the DOD. Military personnel will use their full rank (for example, Lieutenant, Captain, Sergeant) for letters.

c. Abbreviation guidelines.

- (1) Established and well-known abbreviations are acceptable in all but the most formal writing.
- (2) When a word or title that is not well known will be used more than once in a document, place the abbreviated form in parentheses after the first time the word or title is used. Thereafter,

only the abbreviated form is used. Do not put the abbreviated form in parentheses if the word or title is to be used only once.

(3) Do not place a period after abbreviated words in addresses, for example, St (street), Blvd (boulevard), and so forth. The word Fort can be abbreviated (Ft) when used with a location (Ft Drum).

d. Acronyms. Use military and civilian acronyms in memorandums, if appropriate. Do not, however, use military acronyms when writing to individuals or organizations who would not be familiar with their use. When an acronym is to be used more than once, apply the abbreviation rule discussed in paragraph 7-5c(2).

e. You may use abbreviations and acronyms in the body of the correspondence to other Army agencies if the abbreviation is found in AR 310-50, *Authorized Abbreviations, Brevity Codes, and Acronyms*, 15 Nov 85 (available at <<http://books.army.mil/cgi-bin/bookmgr/Shelves>>).

f. You may use abbreviations and acronyms in the body of the correspondence to Department of Defense agencies if the abbreviation is found in Joint Pub 1-02, *DOD Dictionary of Military and Associated Terms*, 12 Apr 01 (available at <www.dtic.mil/doctrine/jel/ref.htm>).

Use of Enclosures

a. Enclosures are documents that accompany the basic correspondence to complete the action and to keep the action concise. Use enclosures to furnish additional information or to enhance understanding of the subject.

b. Refer to the enclosure in the body of the correspondence by explaining what the enclosure or attachment provides. For example, "Enclosure 1 lists the expected release dates of the promotion boards for this fiscal year." See appendix E for specific details.

c. Write the correspondence so the enclosure augments the relevant points found in the basic correspondence. For example, do not provide the background for a document by simply stating, "Background. See Enclosure 1." Allow the basic correspondence to stand on its own merit. One exception is the use of a memorandum as a transmittal document for an enclosure, such as a fact sheet, point paper, etc.

Copies Furnished

Furnish copies of the correspondence to those staff agencies that have an interest in the action or that assisted in the action's formulation. You should also furnish copies to intermediate headquarters for short-suspended requirements to higher headquarters (e.g., Congressional inquiries). Do not needlessly furnish copies.

Staff Officer Guidance and Tips.

a. Put yourself in the place of the person signing the action, then in the place of the recipient. Does the action answer the five Ws: who, what, when, where, and why?

b. Write one-page letters and memorandums for most correspondence.

c. Begin the document with the bottom line up front. State your main point, requested action, recommendation, conclusion, summary, etc.

- d.* Separate the body of the document clearly, using paragraphs, headings, titles, etc.
- e.* Write with clarity and brevity.
- f.* Write in the active voice—subject of action, verb, object of action. The exception to the use of active voice occurs when the object of the action is the focus of the sentence (e.g., The President was re-elected to a second term).
- g.* Use short, commonly understood words. Try to keep words with three or more syllables to under 15 percent of the total words. Avoid using the “-ize” words (e.g., maximize, utilize, etc.).
- h.* Write short sentences, averaging no more than 15 words.
- i.* With few exceptions, use paragraphs no more than 10 lines.
- j.* Do not start a sentence with “It is,” “This is,” or “There are.” Do not use “this” without a modifying noun (e.g., “This completes the action ...”).
- k.* Use “I,” “you,” and “we” as subjects instead of “this office,” “the division,” etc.
- l.* When tasking a subordinate command, do not use “it is requested” or “request that.” Use a simple direct statement that tells the subordinate the action required in a way that answers the five Ws.
- m.* Watch your tone when writing to senior officers.
- n.* Use specific rather than general words. For example, use “soldiers” rather than “personnel” when discussing soldiers. Use “tank” rather than machine.
- o.* Pleasantries such as “please” and “thank you” are normally not appropriate for most military correspondence.
- p.* Do not use wordy phrases (e.g., “as you may recall” vs. “reference,” “in accordance with” vs. “per,” etc.).
- q.* Use the spelling and grammar check tools found in MS Word. Remember the computer is only a tool; the staff officer makes the decisions.
- r.* Proofread your document again **after** you print the document.

9.1 Informal Memorandum

- a.* Use. The informal memorandum is correspondence used internal to an organization. Use the informal memorandum to correspond to another unit, organization, or tenant activity on Fort Riley or within the 52d ID (M). Do not send the informal memorandum to a higher headquarters off Fort Riley.
- b.* General format. Use plain white paper without letterhead. Make every attempt to keep the memorandum to two pages; however, a single page is ideal. Should you feel the information you are providing requires more than two pages, summarize the essential points in the body of the

memorandum and provide the details with enclosures. All margins are 1 inch. Use the standard Times New Roman 12 font.

c. Heading information. Type the proponent office symbol, then use the tab function and the space bar to place the date as far to the right margin as possible. When including a suspense on an informal memorandum, place it two lines above the date, right justified. Suspense dates should also be discussed in the body of the memorandum and be in bold print.

d. Address line. Type MEMORANDUM FOR (all caps) three lines below the office symbol, followed by the recipient. As this is an internal document, there is no need to give the full postal address and zip code. You may use common abbreviations (e.g., CDR for Commander). Type addresses in all uppercase or upper- and lowercase. Be consistent. Do not mix case style. If you are using a standard distribution, type SEE DISTRIBUTION (all caps) after the MEMORANDUM FOR (see AR 25-50, figs 2-9 and 2-10 for the format of the DISTRIBUTION at the end of the memorandum). If you direct the memorandum through another agency, type MEMORANDUM THRU (all caps) on the third line below the office symbol, followed by the intermediate recipient. On the second line below the MEMORANDUM THRU, type FOR (all caps), space once, and type the final recipient. See AR 25-50, paragraph 2-4a(4)(b) for the format of addressing a memorandum to multiple addressees.

e. Subject. Type SUBJECT: (all caps with a colon) two lines below the last line of the address, followed by a short subject title. Capitalize the first letter of the key words in the title. Keep the subject brief; rarely should the subject extend to two lines. Do not use a period after the subject.

f. Paragraph headings. Use paragraph headings to suit your style and organization. Paragraph headings tend to make the document easier to scan. If you use paragraph headings, capitalize the key words of the heading for numbered paragraphs. Do not bold, underline, or italicize the heading.

g. Paragraph 1, Reference. If needed, the reference paragraph is the document's first paragraph and begins on the third line below the last line of the subject. If you have only one reference, list it on the same line as the reference paragraph heading. If you have more than one reference, add an "s" to the reference heading and use a subparagraph for each reference. Use AR 25-50, paragraph 1-31, and this *Staff Officers Guide*, paragraph 7-3, to properly cite your references.

h. Paragraph 2, Purpose. The first paragraph of the memorandum (or the second paragraph if you use references) is always the purpose. Begin the purpose statement with an infinitive verb (e.g., "To inform . . ."). The purpose should answer the five Ws, if appropriate, as concisely as possible. Do not hide "taskers" outside of the purpose statement. Should the memorandum require an action of the recipient, write the purpose statement so that the recipient clearly knows the memorandum is requiring an action. Watch the tone of your purpose when writing to senior officers.

i. Following paragraphs. Use additional paragraphs as necessary. Very often, the next paragraph will be the background, briefly explaining the history of the action to explain why the document is necessary. Paragraphs should rarely exceed 10 lines; consider subparagraphs if the paragraph becomes long and detailed.

j. Subparagraphs. If you use subparagraphs, you must have more than one; e.g., if you have a sub-paragraph "a," you must have a subparagraph "b." Capitalize the first letter of the first word of the sub-paragraph headings, if used. Double space between all paragraphs and subparagraphs.

k. Paragraph AutoFormat. Set your AutoFormat functions so that the second and following lines

of each paragraph and subparagraph return to the left margin. Paragraph indentation options should all be set to zero or none.

l. Tab settings. Set your tab setting to 0.25 inch. Use the tab settings to indent your subparagraphs. AR 25-50, subparagraph 2-4b(3) and figure 2-1, explains the details of indenting and numbering paragraphs. Remember that indenting stops at the second tab. After typing the number of the paragraph or subparagraph, tab again to begin the paragraph heading or sentence; using the tab provides uniform alignment of the beginning letter for each paragraph.

m. Format for second and following pages. The following pages have the same “page set-up” margins as the first page. The top line of the header is the same office symbol as the first page. Do not include the date. On the next line, type the same subject line as on the first page. The body begins on the third line below the last line of the subject.

n. Page break considerations. If you split a paragraph or subparagraph between pages, each page must have at least two lines of the paragraph. Most AutoFormat settings are set to do this by default. If your page break falls between paragraphs, make sure the paragraph on the next page begins on the third line after the header. You may have to remove the blank line between the paragraphs.

o. Header and footer function considerations. Set up the header and footer functions in the Layout submenu of the Page Setup menu. Select “Different first page” for headers and footers; change the header margin to 1 inch from the top and the footer margin to 1 inch from the bottom. If you use the header function for the continuation page heading, type in the office symbol and SUBJECT lines, then return twice. Use Times New Roman 12 font for the headers and footers.

p. Page numbers. The first page does not have a page number; all continuation pages do. Insert the page number using the footer function. Skip a line in the footer, then center the cursor. Select the “#” toggle to insert the page number automatically. Make sure the font is Times New Roman 12.

q. Point of contact. The last numbered paragraph is the point of contact (POC). You do not need a paragraph heading. Include the POC’s name, rank, duty position, organization, telephone number, and e-mail address.

r. Signature block. Begin the signature block on the fifth line after the last line of the body or, if used, the authority line. Do not begin the signature block on a continuation page; always include a portion of your body.

s. Enclosures. See this *Staff Officers Guide*, paragraph 7-6 and appendix E, and AR 25-50, paragraph 4-2, for the use and labeling of enclosures to a memorandum.

ABDA-DOL-T

12 Aug xx

MEMORANDUM THRU Director of Logistics

FOR Garrison Commander

SUBJECT: DOL Truck Fleet

1. References.

a. Point paper, Fort Riley Safety Office, ABCA-S, 8 Aug xx, subject: Vehicle Accident Trend Analysis.

b. Telephone conversation between COL Highpower, 52d ID Chief of Staff, and COL Patton, Director, DOL, 10 Aug xx, subject: Vehicle Accident Trend Analysis.

2. Purpose. To request assistance in determining the most cost-efficient method of reducing DOL's increase in mechanical vehicle failures and accidents.

3. Background. DOL's existing fleet of 5-ton trucks is experiencing a significant rise in vehicle failures that have caused several accidents. Enclosure 1 is the Fort Riley Safety Office's assessment of our safety record. DOL's truck fleet (DeLorean 500) has been in service for an average of 28 years. During 3d quarter, FYxx, DOL's fleet of 5-ton trucks accounted for 46 percent of Fort Riley's total vehicle accidents and safety-related incidents.

4. Summary. Due to the increase in vehicle accidents as a result of mechanical failure, we must determine the most cost-efficient method of correcting this problem. The two options that we are considering are mechanical repair of the existing fleet of DOL trucks or replacing DOL's trucks with new trucks.

5. Assistance Requested. Our initial analysis of the problem shows that we do not have the necessary expertise within the Transportation Division or DOL to conduct a complete analysis. To determine the most cost-efficient method of alleviating these problems, we request the following:

a. Logistics systems analyst. Request a subject matter expert (SME) to examine our vehicles, to assess the ability of our maintenance system at Fort Riley to repair the vehicles, and to develop the options for repair or replacement of these trucks. DOL does not have the expertise in logistics systems analysis, nor does any other agency on Fort Riley. We estimate the analysis will take about a week. We recommend the Garrison Commander request a SME from the Army Materiel Command.

b. Action officer. Request an action officer, preferably a graduate of CAS3, to assist us

in determining the best option to pursue. We do not have an officer in DOL who is trained to research, analyze, and staff a study of this complexity efficiently and properly. After the SME determines the options, we estimate that it will take the action officer 2 weeks to complete the action through the decision.

6. The point of contact is the undersigned at 123-1234/1256, greeni@riley.army.mil.

Encl

Division

I. B. GREEN
Chief, Transportation

9.2 Point Paper

a. Use. Point papers are not correspondence subject to the format guidelines of AR 25-50. Point papers convey information in bullet form by listing facts, assessments, and recommendations in outline form.

b. General format. Rarely does a point paper exceed one page in length. The top, bottom, and right margins are 1-inch margins. The left margin is 1.25 inches to allow for hole punching. Use the standard Times New Roman 12 font and, unless otherwise noted, left justify.

c. Header information. Using right justification, type the proponent office symbol on the top line; type the date one line below the office symbol. Type **Point Paper** (bold and underlined), centered, two lines below the date.

d. Subject. Type SUBJECT: (all caps with colon), left justified, two lines below **Point Paper**, followed by a short subject title. Capitalize the first letter of the key words in the title.

e. First paragraph, Purpose (underlined). Do not number the paragraphs. In one concise statement, state the reason for preparing the document in the infinitive form (e.g., "To . . .").

f. Second paragraph, Discussion Points (underlined). Use bullet statements to outline discussion points. Keep the text in this paragraph short, to the point, and easy to read.

- Use the bullet format to highlight major points. The bullet is at the left margin.
 - Use dashes as subbullets to add supporting information. Use the tab to indent the subbullet.
 - ✓ Present further details, though rare, with checkmarks. Tab again to indent further.

- Do not override the AutoFormat function for the paragraph. Allow the second line of the paragraph to return to the start of the bulletized statement (or “hang” by the tab-setting amount).

g. Third paragraph, Assessment (underlined). Answer the question, “So what?” If you have a single assessment, begin the assessment on the same line as the paragraph heading. If you have more than one assessment, place an “s” on Assessment and use a bulletized subparagraph for each. If you have no assessment, use a fact sheet (facts only) (see para 7-14 for format).

h. Fourth paragraph, Recommendation (underlined). State your recommendation(s). If you have a single recommendation, begin the recommendation on the same line as the paragraph heading. If you have more than one recommendation, place an “s” on Recommendation and use a bulletized subparagraph for each. If you are recommending one of two recommendations, but not both, do not use subbullets. If you have no recommendation, use a fact sheet (interpreted facts) (see para 7-15 for format).

i. Point of contact, release authority, and any coordination lines. Place this information beginning on the second line after the last bullet. Paragraph 7-14i of this *Staff Officers Guide* describes the format.

Labeling Enclosures. In pencil, write Encl with the number of the enclosure at the lower right corner of the first page of each enclosure, as shown on the sample point paper.

ABCA-SO

12 August 20xx

Point Paper

SUBJECT: Vehicle Accident Trend Analysis

Purpose. To inform the Director, Directorate of Logistics (DOL) of the accident profile and trend analysis regarding DOL's fleet of 5-ton commercial trucks (DeLorean 500).

Discussion Points.

- DOL's truck fleet (DeLorean 500) experienced a significant rise in vehicle accidents over the last two quarters (2^d and 3^d quarters, FYxx).
- Vehicle accidents and mechanical failures increased 54 percent and 73 percent, respectively, since 1 April 20xx.
- During 3^d quarter, FYxx, DOL's 5-ton truck fleet experienced 13 accidents and 18 mechanical failures (that resulted in damages), accounting for 46 percent of Fort Riley's total vehicle accidents and safety related incidents last quarter.
 - Final drive shaft failure was the largest contributor to accidents and mechanical failures.
 - ✓ Final drive shafts are directly attributable to 85 percent of the accidents involving the DOL truck fleet (11/13).
 - ✓ Final drive shaft failures account for over 83 percent of the mechanical failures (15/18).
 - The DeLorean 500 fleet is accountable for 5 loss days due to personal injuries and over \$150,345 due to damages during accidents or mechanical failure.

Assessments.

- DOL's DeLorean 500 fleet is experiencing an unprecedented increase in accidents and mechanical failures directly related to the final drives.
- The DeLorean 500 fleet is a safety risk to its users and to the Fort Riley community.

Recommendation. Purchase new trucks or stand down the 5-ton fleet to inspect and rebuild the existing trucks.

Mr. Smith, ABCA-SO, DSN 999-3344
rsmith@riley.army.mil
Approved By: Ms. Nelson

Encl 1

9.3 Formal Memorandum

a. Use. The formal memorandum is used for correspondence that is sent off the installation, for policy directives, or for personal correspondence sent through the chain of command to an individual.

b. General format. Use white letterhead stationary for the first page and plain white paper for continuing pages. Make every attempt to keep the memorandum to two pages; however, a single page is ideal. Should you feel the information you are providing requires more than two pages, summarize the essential points in the body of the memorandum and provide the details in enclosures. The left and right margins are 1-inch margins. Set the top margin so the text begins on the second line below the seal. Set the bottom margin to 1 inch. Use the standard Times New Roman 12 font.

c. Heading information. Type the proponent office symbol on the second line below the seal, then use the tab function and space bar to place the date as far to the right margin as possible.

d. Address line. Type MEMORANDUM FOR (all caps) three lines below the office symbol, followed by the recipient. Address the memorandum to the particular office that will complete the action or needs the information. Give the full postal street address and zip code. If the address extends to a second line, continue the address on the next line so that the beginning is at the left margin.

e. Subject. Type SUBJECT: (all caps with a colon) two lines below the last line of the address, followed by a short subject title. Capitalize the first letter of the key words in the title. Keep the subject brief; rarely should the subject extend to two lines. Do not use a period after the subject.

f. Paragraph headings. Use paragraph headings to suit your style and organization. Paragraph headings tend to make the document easier to scan. If you use paragraph headings, capitalize the key words of the heading for numbered paragraphs. Do not bold, underline, or italicize the heading.

g. Text. The first paragraph of the text begins on the third line below the last line of the subject. At this point, the format for the remainder of the formal memorandum, including any continuation pages, is the same as the format for the informal memorandum.

Format of the Authority Line.

a. Paragraph 3-11 of this *Guide* explains the use of the authority line. Authority lines are appropriate for use with all correspondence described in AR 25-50. Remember not to use the pronouns “I,” “me,” or “my,” when preparing correspondence that will be signed “FOR THE COMMANDER” or “FOR THE DIRECTOR.”

b. When you use an authority line, type FOR THE COMMANDER: (all caps with a colon) on the second line below the last line of the text. If writing for the director, type FOR THE DIRECTOR: in the same location. Begin the signature block on the fifth line below the authority line (which is the

seventh line below the last line of text).



DEPARTMENT OF THE ARMY
HEADQUARTERS, 52D INFANTRY DIVISION (MECHANIZED) AND FORT
RILEY
BUILDING 500, HUEBNER ROAD
FORT RILEY, KANSAS 66442-5000

REPLY TO
ATTENTION OF

ABCA-DOL

20 August 20xx

MEMORANDUM FOR Forces Command Material Management Center (FMCC/LTC Shnell), 1777 Hardee Street, Building 200, Fort McPherson, GA 30330-1062

SUBJECT: Request for Subject Matter Expert (SME)

1. Reference. Telephone conversation between Mr. Counts, Director of Logistics, Fort Riley, and Mr. Goodwrench, Chief, FMCC, AMC, 12 Aug xx, SAB.
2. Purpose. To request a SME from FMCC during the period of 6—11 Oct xx, to assist us in evaluating the maintenance system for our Directorate of Logistics existing cargo truck fleet and to develop options and requirements for the possible repair or replacement of the trucks.
3. Background. Fort Riley's installation truck fleet (DeLorean 500 5-ton cargo) has an average age of 28 years. We have experienced a steady rise in vehicle accidents with these trucks because of mechanical failures. While we are intensifying our maintenance focus on the trucks for the short term, we are committed to providing a safe environment for our soldiers and civilians for the long term. Accordingly, we are investigating whether to overhaul the current fleet or to purchase a new fleet as soon as the new fiscal year begins.
4. Request. We request a SME with the expertise to examine our current maintenance program, to assess the condition of our fleet, and to determine the cost-effectiveness of overhauling the fleet. We are particularly concerned about the cost-effectiveness of overhauling a fleet of this model and of this age. We will fund the temporary duty and travel expenses for the SME; we estimate that the SME will need a week to complete the assessment. We have assigned an action officer to assist the SME with the assessment and with coordination on Fort Riley.
5. The point of contact is Captain Knott N. Kontrol, Action Officer, DOL, DSN 123-6789.

FOR THE COMMANDER:

I. M. HIGHPOWER
COL, GS
Chief of Staff

9.4 Fact Sheet

a. Use. Fact sheets are not correspondence subject to the format guidelines of AR 25-50. Fact sheets provide a bulletized summary of facts concerning an issue, action, or conference. A fact sheet (facts only) provides only facts; should the facts lead to a conclusion, use the fact sheet (interpreted facts) format. Use a fact sheet when the reader knows the background of the subject; otherwise, use an information paper.

b. General format. Rarely should the fact sheet exceed one page in length. The top, bottom, and right margins are 1-inch margins. The left margin is 1.25 inches to allow for hole punching. Use the standard Times New Roman 12 font and, unless otherwise noted, left justify.

c. Header information. Using right justification, type the proponent office symbol on the top line; type the date one line below the office symbol. Type **Fact Sheet** (bold and underlined), centered, two lines below the date.

d. Subject. Type SUBJECT: (all caps with colon), left justified, two lines below **Fact Sheet**, followed by a short subject title. Capitalize the first letter of the key words in the title.

e. First paragraph, Purpose (underlined). Do not number the paragraphs. In one concise statement, state the reason for preparing the document in the infinitive form (e.g., “To . . .”).

f. Second paragraph, Discussion (underlined). Use bullet statements to outline discussion points. Keep the text in this paragraph short, to the point, and easy to read.

- Use the bullet format to highlight major points. The bullet is at the left margin.
 - Use dashes as subbullets to add supporting information. Use the tab to indent the subbullet.
 - ✓ Present further details, though rare, with checkmarks. Tab again to indent further.
- Do not override the AutoFormat function for the paragraph. Allow the second line of the paragraph to return to the start of the bulletized statement (or “hang” by the tab-setting amount).

g. Second and following page format. Should the fact sheet exceed one page, type both the header and page number the same way as for subsequent pages of a memorandum.

h. Coordination. Left justify the coordination in the fact sheet’s lower left corner. Type Coord: on the second line below the last line of the discussion paragraph. On the subsequent lines, type the rank, last name, and office symbol of any activity or activities with whom the action officer coordinated.

i. Point of contact (POC) and approval authority. Type the action officer’s rank and last name,

office symbol, and DSN phone number on the second line below the last line of the discussion paragraph (same line as Coord:). Type the POC's e-mail address on the next line. On the line below the POC information, type Approved By: (with colon); then type the rank and name of the supervisor releasing the fact sheet to higher headquarters. For fact sheets prepared for the command group, the approval authority is the staff principal. Use your tab to place these entries as close as possible to the right margin.

ABDA-DOL-T

12 August 20xx

Fact Sheet

SUBJECT: DeLorean 500 Truck Fleet

Purpose. To inform the Chief of Staff of the background and current status of DOL's 5-ton cargo truck fleet (DeLorean 500).

Discussion.

- The DeLorean 500 is a 5-ton commercial diesel cargo truck.
- Fort Riley purchased 19 DeLorean 500s in 1971, making the fleet 28 years old. Since 1971, we have coded out or transferred 5 of the trucks.
- We currently have 14 DeLorean 500s, with 8 nonmission capable, 2 undergoing scheduled services, and 4 mission capable.
- The fleet's fuel efficiency is 12 miles per gallon.
- The fleet's mean time between failure (MTBF) has steadily dropped in recent years to the current 101 hours.
 - The MTBF was 208 hours in FY90 and remained steady until FY97, when it dropped to 156 hours.
 - The MTBF rate has dropped 23 percent in each of the past 2 fiscal years.
- The fleet was involved in 13 accidents and 18 mechanical failures last quarter, which accounted for 46 percent of Fort Riley's total safety related incidents.
- Parts availability continues to worsen, with a typical part replacement taking 15 days to arrive on the installation.
- Cost of replacement parts continues to rise. Last year, cost of parts rose 9 percent for the fleet.
- Overtime costs due to DeLorean 500 maintenance increased by \$78,000 last year.

Coord:

Mr. Green, ABCA-DOL-T, DSN 999-1278

Mr. Smith, ABCA-SO

hgreen@riley.army.mil

Ms. Nelson, ABCA-CPO

Approved By: Mr. Counts

Fact Sheet (Interpreted Facts)

a. Use. Fact sheets are not correspondence subject to the format guidelines of AR 25-50. Fact sheets (interpreted facts) provide a bulletized summary of facts concerning an issue or action with a deduced conclusion. Should the facts not lead to a conclusion, use the fact sheet (facts only) format. Use a fact sheet when the reader knows the background of the subject; otherwise, use an information paper.

b. General format. Rarely should the fact sheet exceed one page in length. The top, bottom, and right margins are 1-inch margins. The left margin is 1.25 inches to allow for hole punching. Use the standard Times New Roman 12 font and, unless otherwise noted, left justify.

c. Header information. Using right justification, type the proponent office symbol on the top line; type the date one line below the office symbol. Type **Fact Sheet** (bold and underlined), centered, two lines below the date.

d. Subject. Type SUBJECT: (all caps with colon), left justified, two lines below **Fact Sheet**, followed by a short subject title. Capitalize the first letter of the key words in the title.

e. First paragraph, Purpose (underlined). Do not number the paragraphs. In one concise statement, state the reason for preparing the document in the infinitive form (e.g., “To . . .”).

f. Second paragraph, Discussion (underlined). Use bullet statements to outline discussion points. Keep the text in this paragraph short, to the point, and easy to read.

- Use the bullet format to highlight major points. The bullet is at the left margin.
 - Use dashes as subbullets to add supporting information. Use the tab to indent the subbullet.
 - ✓ Present further details, though rare, with checkmarks. Tab again to indent further.
- Do not override the AutoFormat function for the paragraph. Allow the second line of the paragraph to return to the start of the bulletized statement (or “hang” by the tab-setting amount).
- g.* Second page format. Should the fact sheet exceed one page, type both the header and page number the same way as for subsequent pages of a memorandum.

h. Third paragraph, Conclusion (underlined). The conclusion can be a fragment sentence.

i. Coordination. Left justify any coordination in the fact sheet’s lower left corner. Type Coord: on the second line below the last line of the conclusion paragraph. On the subsequent lines, type the rank, last name, and office symbol of any activity or activities with whom the action officer coordinated.

j. Point of contact (POC) and approval authority. Type the action officer’s rank and last name, office symbol, and DSN phone number on the second line below the last line of the discussion paragraph (same line as “Coord:”). Place the POC’s e-mail address on the next line. Type the rank and name of the supervisor releasing the fact sheet on the line below the POC. For fact sheets prepared for the command group, the approval authority is the staff principal. Use your tab to place these entries at the right margin.

ABCA-C

7 September 20xx

Fact Sheet

SUBJECT: Buy American Act

Purpose. To inform the Garrison Commander about the constraints imposed by the Buy American Act should Fort Riley decide to purchase new cargo trucks for DOL.

Discussion.

- Federal Acquisition Regulation (FAR) 97-05 requires that only domestic end products be acquired for public (Federal) use.
- FAR 97-05 definitions:
 - “Components” means those articles, materials, and supplies incorporated directly into the end products.
 - “Domestic end product” means an end product manufactured in the United States and the cost of its components mined, produced, or manufactured in the United States exceeds 50 percent of the cost of all its components.
 - “End product” means those articles, materials, and supplies to be acquired for public use under the contract.
 - “United States” means the United States, its possessions, territories, and any other place subject to its jurisdiction, but does not include leased bases or trust territories.
- Paragraph 25.102, FAR 97-05, lists exceptions; however, none apply to the purchase of cargo trucks for Fort Riley’s DOL.

Conclusion. Should Fort Riley decide to purchase new vehicles next month, the cost of the US-made components in the vehicle must be at least 50 percent of the total cost of the components.

Coord:

Ms. DeBuss, ABCA-C, 123-7777

Mr. Smith, ABCA-SO

cdebuss@riley.army.mil

Ms. Nelson, ABCA-CPO

Approved By: MAJ Payne

9.5 Information Paper

Information Paper

a. Use. Information papers are not correspondence subject to the format guidelines of AR 25-50. Information papers provide a summary of facts concerning an issue, action, or conference. Use an information paper instead of a fact sheet when the reader is not familiar with the subject. Present the information in complete sentences—**do not use bullets**. A facts-only information paper presents facts only. An interpreted-facts information paper adds a conclusion to the facts.

b. General format. Rarely should the information paper exceed one page in length. The top, bottom, and right margins are 1-inch margins. The left margin is 1.25 inches to allow for hole punching. Use the standard Times New Roman 12 font and, unless otherwise noted, left justify.

c. Header information. Using right justification, type the proponent office symbol on the top line; type the date one line below the office symbol. Type **Information Paper** (bold and underlined), centered, two lines below the date.

d. Subject. Type SUBJECT: (all caps with colon), left justified, two lines below **Information Paper**, followed by a short subject title. Capitalize the first letter of the key words in the title.

e. Paragraph headings. Number the paragraphs. Do not bold, underline, or italicize the paragraph headings.

f. Paragraph AutoFormat. Set your AutoFormat functions so that the second and following lines of each paragraph and subparagraph return to the left margin.

g. Paragraph 1, Purpose. In one concise statement, state the reason for preparing the document in the infinitive form (e.g., “To…”).

h. Paragraph 2, Discussion Points. Use lettered subparagraphs and full sentences to present discussion points. Keep the text in this paragraph short, to the point, and easy to read. To add supporting information to a lettered subparagraph, use (1), (2), etc., as in the memorandum format.

i. Paragraph 3, Conclusion. For a facts-only information paper, delete this paragraph. Include this paragraph in the interpreted-facts information paper to present a deduced conclusion in a full sentence.

j. Second page format. Should the information paper exceed one page, type both the header and page number the same way as for subsequent pages of a memorandum.

k. Coordination. Left justify any coordination in the paper’s lower left corner. Type Coord: on the second line below the last line of the conclusion paragraph. On the subsequent lines, type the rank, last name, and office symbol of any activity or activities with whom the action officer coordinated.

l. Point of contact (POC) and approval authority. Type the action officer’s rank and last name, office symbol, and DSN phone number on the second line below the last line of the discussion paragraph (same line as Coord:). Type the POC’s e-mail address on the next line. Type the rank and name of the supervisor releasing the information paper to higher headquarters on the line below the POC information. For information papers prepared for the command group, the approval authority is

the staff principal. Use your tab to place these entries at the right margin.

ABCA-C

7 September 20xx

Information Paper

SUBJECT: Buy American Act

1. Purpose. To inform the Garrison Commander about the constraints imposed by the Buy American Act should Fort Riley decide to purchase new cargo trucks for DOL.
2. Discussion.
 - a. Federal Acquisition Regulation (FAR) 97-05 requires that only domestic end products be acquired for public (Federal) use.
 - b. FAR 97-05 establishes the following definitions:
 - (1) “Components” means those articles, materials, and supplies incorporated directly into the end products.
 - (2) “Domestic end product” means an end product manufactured in the United States and the cost of its components mined, produced, or manufactured in the United States exceeds 50 percent of the cost of all its components.
 - (3) “End product” means those articles, materials, and supplies to be acquired for public use under the contract.
 - (4) “United States” means the United States, its possessions, territories, and any other place subject to its jurisdiction, but does not include leased bases or trust territories.
 - c. Paragraph 25.102, FAR 97-05, lists exceptions; however, none apply to the purchase of cargo trucks for Fort Riley’s DOL.
3. Conclusion. Should Fort Riley decide to purchase new vehicles next month, the cost of the US-made components in the vehicle must be at least 50 percent of the total cost of the components.

Coord:

Ms. DeBuss, ABCA-C, 123-7777
Mr. Smith, ABCA-SO
cdebuss@riley.army.mil
Ms. Nelson, ABCA-CPO

Approved By: MAJ Payne

9.6 Routing Sheet

Routing Sheet (52d ID (M) & Fort Riley Form 2039 (R)).

a. Use. The 52d Infantry Division & Fort Riley Routing Sheet is for use on Fort Riley only to route correspondence among the various units and activities. Staff officers at the division and garrison level will use the routing sheet for all written correspondence that leave their staff activity. Staff officers at other levels will use the form for all written correspondence staffed through a garrison or division staff activity.

b. The action officer will complete:

- (1) The "Subject" block with the same subject as that of the correspondence being staffed.
- (2) The "Date" block with the date the action officer began the routing.
- (3) The "Originator/Action Officer" block.
- (4) The "Office Symbol" block with the same office symbol as that of the correspondence being staffed.
- (5) The "Telephone" block with the action officer's telephone number.
- (6) The "E-mail" block with the action officer's e-mail address.
- (7) The routing sequence minus the routing through the command group. Route the document in sequence on the basis of the activity's interest in the subject, beginning with the activity with the most interest. Routing in this way is more efficient should an activity desire a change to the document. The action officer will make the SGS the last person in the routing sequence for correspondence going to the command group.
- (8) The "Remarks" block with a handwritten or typed note to the author of the tasker. The message should connote that the action officer has completed the tasker or that the document is an interim action of the tasker. Also indicate in the remarks whether the action is subject to any higher headquarters' or regulational suspenses. *Do not use the "Suspense" block.*
- (9) The "Electronic File Name" block with the name(s) of the file(s) contained in the packet and on the J-drive (see para 3-13 of this *Staff Officers Guide*).

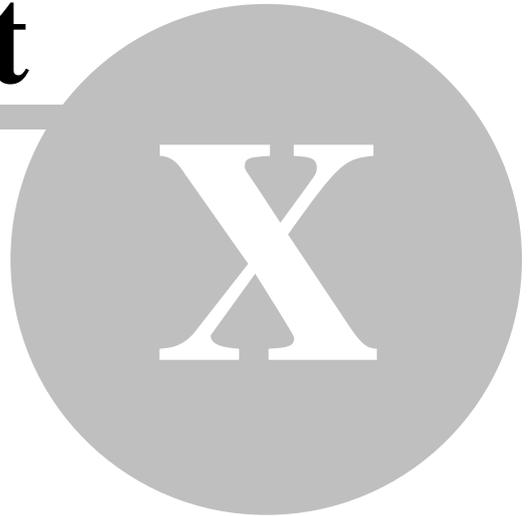
c. The action officer's activity will complete the "Activity Control Number" block as the action leaves the activity to begin the routing.

d. The Secretary of the General Staff (SGS) will complete:

- (1) The "SGS Control Number" block.
- (2) The "Suspense" block.
- (3) The routing sequence through the command group.
- (4) The "Action Required" block.

Appendixes

Part



10 Appendixes

Enter topic text here.

10.1 References

AR 25-11, *Record Communications and the Privacy Communications System*, 4 Sep 90

AR 25-50, *Preparing and Managing Correspondence*, 5 Mar 01

AR 310-50, *Authorized Abbreviations, Brevity Codes, and Acronyms*, 15 Nov 85

FM 101-5, *Staff Organization and Operations*, 31 May 97

Joint Pub 1-02, *DOD Dictionary of Military and Associated Terms*, 12 Apr 01

FR Reg 10-3, *Manual of Organizations and Functions*, 24 Aug 92

DA PAM 600-67, *Effective Writing for Army Leaders*, 2 Jun 86

U.S. Government Printing Office Style Manual, 2000

10.2 Jargon for Staff Officers

Term	Definition
Action	A staff paper or project.
Blast (a blast)	An action paper or coordination input that attacks the position being taken by some organization, usually in blunt terms.
Bless	Approval of an action for coordination or forwarding.
Blurb	A short note or write-up.
Bootleg copy	Unofficial advance working copy of a tasking document or action paper.
Brainstorm	A meeting at which ideas are freely surfaced and discussed, no matter how far out they may be, in the interest of uncovering all possible approaches to (or parameters of) an issue or problem.
Buck slip	Optional Form (OF) 41, Routing and Transmittal Slip. Use this form primarily for simple handwritten communications internal to an office.
Butcher charts	Large flimsy charts on a chart stand that turn like pages in a book (vertically). Chart paper is roughly the same size as paper used to wrap meat in butcher shops.
Buy	To approve, concur, or accept an action from another agency.

Chop	Concurrence acquired during coordination.
Crunch	A bind—a lot of work with little time for completion.
Cut and paste	To reorganize basic elements in a paper (e.g., paragraphs), usually by means of the cut and paste functions of a computer application.
Dog and pony show	A briefing that uses multimedia, full-motion video, or techniques that are considered above and beyond the expected standard. Sometimes this term simply suggests that someone is to be briefed.
Fallback position	Alternate position—a position to take if the primary stance on an issue is not approved.
Flaky	Refers to a staff paper that contains conclusions and recommendations that will not hold up under hard analysis.
Float	To submit an action for approval or coordination.
Fly	Means action will be approved. More commonly used in a negative sense, as in “it won’t fly.”
Grease	Sometimes called “greasing the skids.” Refers to preliminary effort or lobbying in support of a position or paper to help ensure that it is favorably considered.
Gut issue	The single most important point or consideration.
Happy to glad	To make minor nonsubstantive corrections to a paper.
Heartburn	Serious disagreement with a proposal or staff action.
Idiot blocks	Option lines at the end of a staff paper which allow the decision maker to indicate his or her decision or desires by using a check mark (e.g., APPROVED _____ DISAPPROVED _____ SEE ME _____).
Input	Information provided in response to a request or reporting requirement.
Iteration	One version of a paper. Each subsequent rewrite is referred to as an iteration.
Loaded action	An action that raises difficult issues. Term also used in referring to an action which has purposely been designed to appear simple or routine on the surface in order to disguise its true significance.
Massage	Rework a paper or reformat data.
Non-seller	An action or proposal which will probably not be approved. Same as “won’t fly” or “won’t wash.”

OBE	Overtaken or overcome by events.
Prebrief	A briefing to an intermediary before giving the briefing to the requesting official. Also referred to as a “dry run.”
Primary staff	For a unit, the chief of staff (or executive officer) and the coordinating staff officers, G1 through G6 (or S1 through S6). For a garrison, the deputy garrison commander and the directors.
Pump somebody up	Brief an individual until he is fully informed on a subject. Term frequently used in relation to staff briefings, where individual doing the briefing may represent several organizations. Other organizations involved “pump up” the briefer in their areas of interest.
Scrub	To refine a paper by eliminating excess verbiage, getting data down to essentials. To scrub is to tidy up and “tighten up” phraseology and data displays. Scrub can also refer to cancellation of a meeting or conference.
Short fuse	A short deadline or suspense.
Shotgun	Simultaneous staffing or distribution of the same document to several offices.
Smoke screen	Attempt to obscure or draw attention away from the real issue.
Staff principal	The officer in charge of a staff agency (e.g., ACofS, G1 or S1 in a unit or the director of a garrison directorate).
Strawman	A concept paper or other document prepared as a basis for discussion or coordination. Sometimes referred to as a “think piece,” a strawman is usually the forerunner of a later document.
Surface	To raise an issue.
Suspense	Time allowed to complete an action (e.g., suspense is 5 February).
Talking paper	Paper used by key official as outline for briefing or discussion.
Track	<p>v. 1. To monitor an action (follow up) or determine its status.</p> <p>n. 2. The wording in a staff paper follows a logical and understandable sequence.</p>
Turn around	To return an action to the officer or agency for correction or revision. Also refers to reversal of an approved position by higher authority.
Waffle	Intentional or unintentional use of phraseology that skirts the issue.
Whatif-ing	Effort to identify all conceivable eventualities and develop contingency plans

to meet them. In the positive sense, it means brainstorming. In the negative sense, it signifies dilution of effort or resources by generating projects of limited or remote importance.

Won't wash

Means that a paper or proposal stands little chance of favorable consideration.

Wordsmith

Rewriting of a paper to smooth out wording without changing substance.

Working paper

A preliminary document in draft form. Also referred to as a "working draft."

10.3 Abbreviations

Term	Definition
ACofS	Assistant Chief of Staff
ADC-M	Assistant Division Commander for Maneuver
ADC-S	Assistant Division Commander for Support
AG	Adjutant General
AO	Action officer
AR	Army regulation
ARNG	Army National Guard
CCR	Command Conference Room
CG	Commanding General
CINC	Commander in Chief
CMDB	Central Mail and Distribution Branch
COA	Course of action
COCOM	Combatant Command
CofS	Chief of Staff
CPO	Civilian Personnel Office
CSA	Chief of Staff, US Army
CSM	Command Sergeant Major
DCSM	Division Command Sergeant Major

DCSOPS	Deputy Chief of Staff for Operations
DCSPER	Deputy Chief of Staff for Personnel
DECMAT	Decision matrix
DEH	Directorate of Engineering and Housing
DENTAC	Dental activity
DNR	Do not retransmit
DOD	Department of Defense
DOIM	Directorate of Information Management
DOL	Directorate of Logistics
DPTM	Directorate of Plans, Training, and Mobilization
DSN	Defense Switched Network
EC	Evaluation criteria
e.g.	<i>Exempli gratia</i> (for example)
EXSUM	Executive Summary
FM	Field manual
FRR	Fort Riley Regulation
GC	Garrison Commander
HQ	Headquarters
HQDA	Headquarters, Department of the Army
i.e.	<i>id est</i> (that is; that is to say)
IG	Inspector General
IRAC	Internal review and audit compliance
MARKS	Modern Army Recordkeeping System
MEDDAC	Medical department activity
MFR	Memorandum for record

MOS	Military occupational specialty
OMA	Operation and Maintenance, Army
OPORD	Operation order
OPSEC	Operations security
PAO	Public Affairs Office
PMO	Provost Marshal Office
POC	Point of contact
SACS	Staff Action Control System
SC	Screening criteria
SGS	Secretary of the General Staff
SGM	Sergeant Major
SJA	Staff Judge Advocate
SME	Subject matter expert
SOP	Standing operating procedure
TACOM	Tank-automotive Command
TACSOP	Tactical standing operating procedure
USAR	United States Army Reserve
USPS	United States Postal Service
XO	executive officer

10.4 Problem Solving Process

1. Recognize and define the problem
2. Gather information
3. List possible solutions
4. Test possible solutions

5. Select the best solution

6. Implement the solution

10.5 Enclosures

Memorandums

a. AR 25-50, Paragraphs 2-4c(3), 4-2, and figure 2-14.

b. Should identify enclosures clearly in the text. If so done, then type “Encl” or “Encls” at the left margin on the same line as the first line of the signature block. If two or more enclosures are attached, then indicate the number of enclosures as well--“2 Encls” or “4 Encls,” for example. Underneath type “as” for “as stated.” Do not use “as stated.”

c. If enclosures are not identified in the text, then list them individually underneath “Encl” or “Encls.” If more than one enclosure is listed, number them as shown in paragraph 4-2c.

Letters

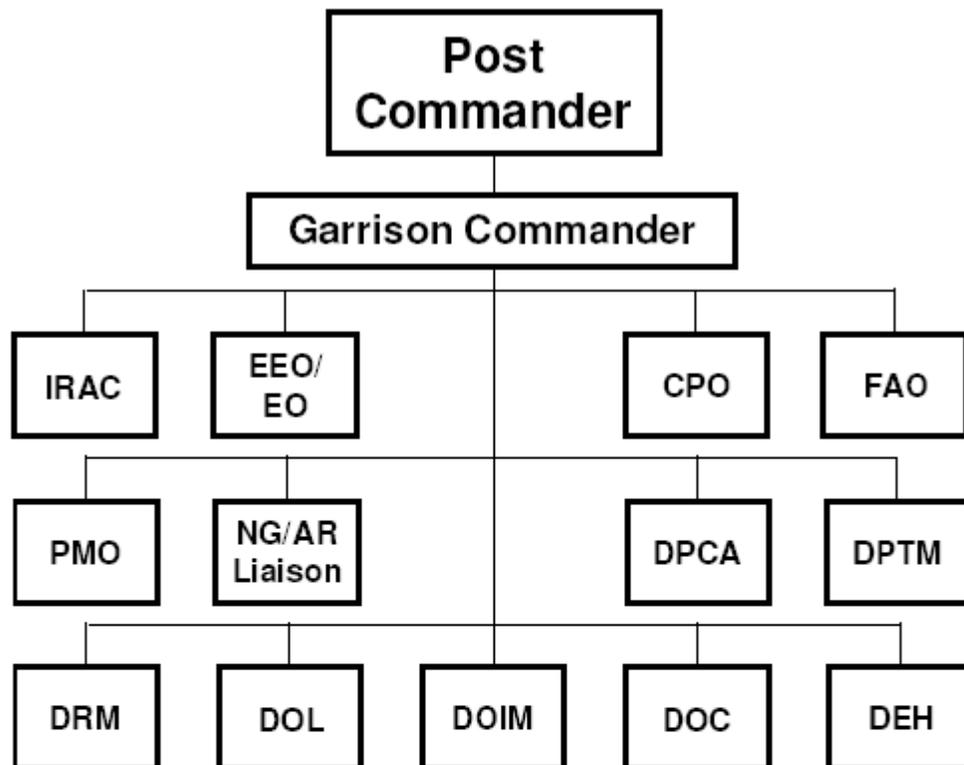
a. AR 25-50, Paragraph 3-7d(3) and figure 3-2.

b. Identify enclosures clearly in the text.

c. Type “Enclosure” at the left margin on the second line below the signature block. If more than one enclosure, type “Enclosures.” Do not use “Encl” or “Encls.” Do not show the number of enclosures.

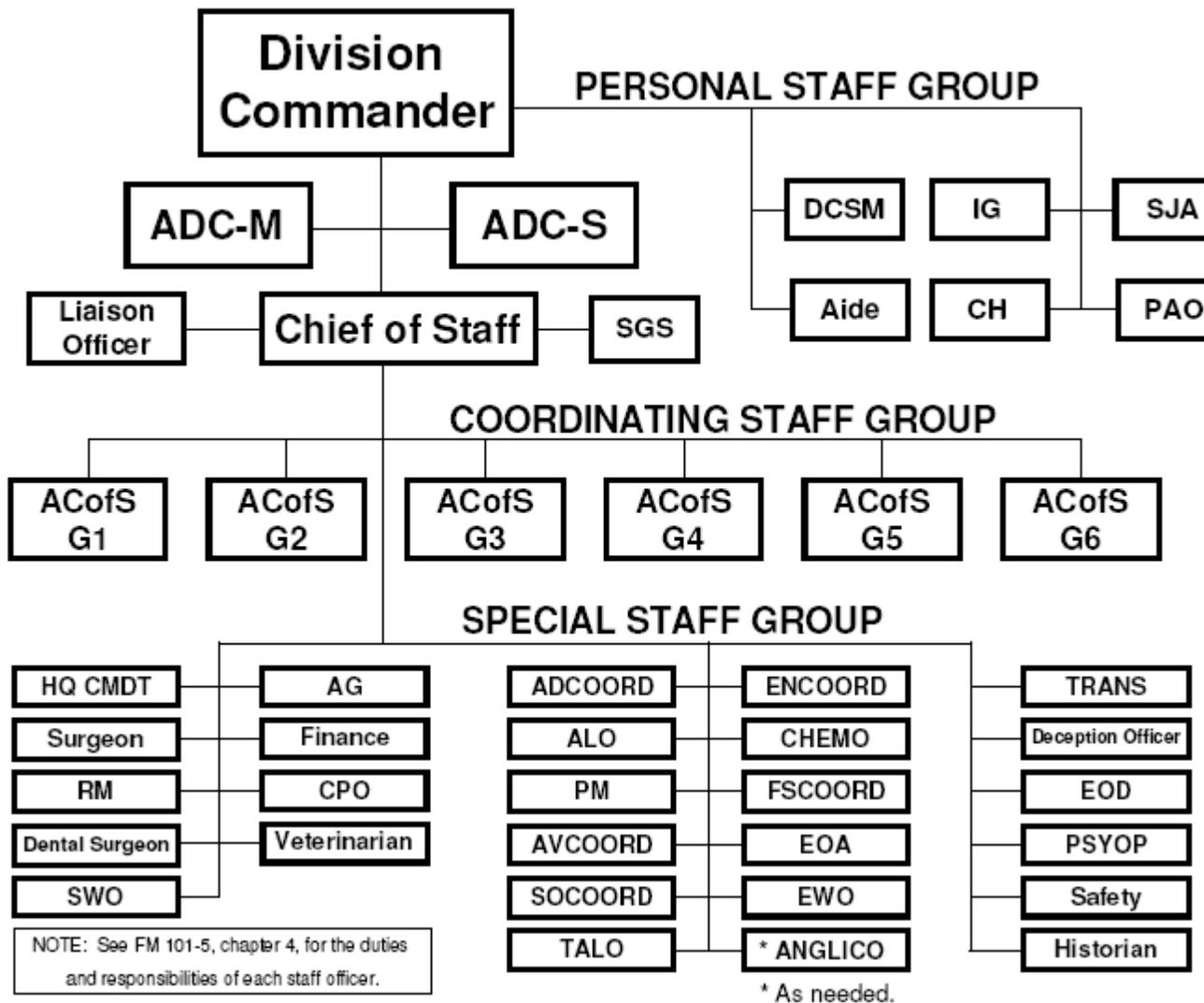
d. Do not use “as,” “as stated,” or list the enclosures.

10.6 Garrison Staff



IRAC:	Internal Review and Audit Compliance
EEO/EO:	Equal Employment Opportunity/ Equal Opportunity
CPO:	Civilian Personnel Office
FAO:	Finance and Accounting Office
PMO:	Provost Marshal Office
NG/AR Liaison:	Army National Guard (ARNG) and US Army Reserve (USAR) Liaison & Advisors
DPCA:	Directorate of Personnel and Community Activities
DPTM:	Directorate of Plans, Training, and Mobilization
DRM:	Directorate of Resource Management
DOL:	Directorate of Logistics
DOIM:	Directorate of Information Management
DOC:	Directorate of Contracting
DEH:	Directorate of Engineering and Housing

10.7 Division Staff

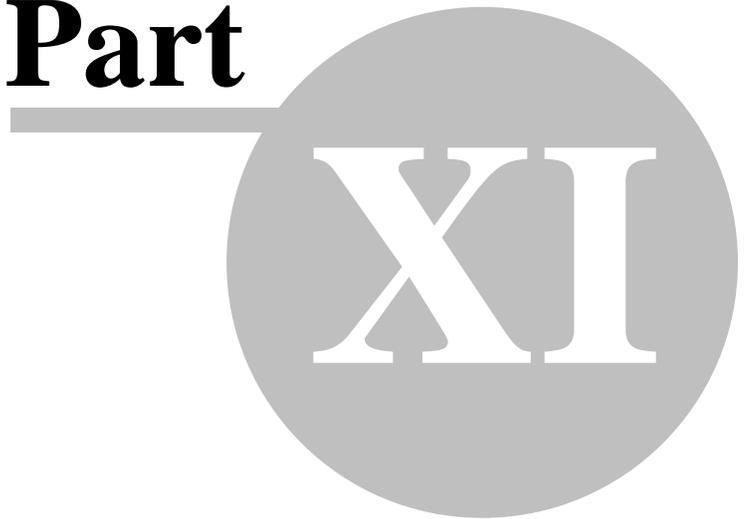


10.8 Routing Slip

SUSPENSE													
<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="border: 1px solid black; padding: 5px; font-size: 24px; font-weight: bold;">52</div> <div style="text-align: center;"> <h2 style="margin: 0;">52D INFANTRY DIVISION & FORT RILEY</h2> <h3 style="margin: 0;">ROUTING SHEET</h3> </div> </div>													
SUBJECT				DATE		ACTIVITY CONTROL NUMBER		SGS CONTROL NUMBER					
ORIGINATOR / ACTION OFFICER				OFFICE SYMBOL		TELEPHONE		E-MAIL					
	ROUTING	INIT	DATE		ROUTING	INIT	DATE	COMMAND GROUP ROUTING					
	DPCA				ACofS G1			OFFICE	INITIALS	DATE			
	DSEC				ACofS G2			CG					
	DPTM				ACofS G3								
	DOL				ACofS G4			ADC-M					
	DEH				ACofS G5								
	DRM				ACofS G6			ADC-S					
	PAO				IG								
	SAFETY				SJA			CofS					
	DOIM				CHAPLAIN								
	DOC				SURGEON			GAR CDR					
	EEO				HQ CMDT								
	CPO				PMO			CSM					
	MEDDAC												
	DENTAC							SGS					
	UNIT ROUTING	ACTION	INFO	REMARKS				ACTION REQUIRED					
	1 st BDE							SIGNATURE			INFORMATION		
	2 nd BDE							DECISION			OTHER		
	3 rd BDE												
	DIVARTY												
	DIVEN												
	52 nd AVN BDE												
	DISCOM												
	52 nd MI BN												
	1-441 ADA												
	52 nd SIG												
				ELECTRONIC FILE NAME									

Proponency

Part



11 Proponency

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