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NAVAL POSTGRADUATE SCHOOL

MONTEREY, CALIFORNIA

MBA PROFESSIONAL REPORT

**Naval Expeditionary Logistics:
A Handbook for Complementing and
Supporting Land Forces**

**By: Keith A. Applegate
September 2006**

**Advisors: E. Cory Yoder
Keebom Kang**

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**NAVAL EXPEDITIONARY LOGISTICS:
A HANDBOOK FOR COMPLEMENTING AND
SUPPORTING LAND FORCES**

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Submitted in partial fulfillment of the requirements for the degree of

MASTER OF BUSINESS ADMINISTRATION

from the

**NAVAL POSTGRADUATE SCHOOL
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TABLE OF CONTENTS

I.	INTRODUCTION.....	1
A.	OVERVIEW	1
B.	PURPOSE.....	5
C.	ORGANIZATION	7
D.	NAVAL EXPEDITIONARY LOGISTICS	8
1.	Defined	8
2.	Functional Areas	9
a.	<i>Supply</i>	<i>9</i>
b.	<i>Maintenance.....</i>	<i>9</i>
c.	<i>Transportation.....</i>	<i>9</i>
d.	<i>Engineering.....</i>	<i>10</i>
e.	<i>Health Services.....</i>	<i>10</i>
f.	<i>Other Logistic Services</i>	<i>10</i>
II.	RECOMMENDATIONS.....	13
A.	ANALYSIS	13
1.	Naval Doctrine.....	13
2.	Training	14
B.	EXPANDING NAVAL LOGISTICS	16
1.	Additional Reading	17
2.	Research Opportunities.....	18
	APPENDIX A: THE OPERATION ORDER.....	19
A.	OPERATIONS PLANNING – PROCESS & INTENT.....	19
1.	Contingency & Crisis Action Planning.....	20
2.	Orders	24
a.	<i>Warning Order</i>	<i>24</i>
b.	<i>Alert Order.....</i>	<i>25</i>
c.	<i>Planning Order</i>	<i>25</i>
d.	<i>Deployment Order</i>	<i>25</i>
e.	<i>Execute Order</i>	<i>25</i>
f.	<i>Fragmentary Order</i>	<i>26</i>
g.	<i>Time Phased Force Deployment Data.....</i>	<i>26</i>
B.	OPERATION ORDER STYLE & CONTENT.....	26
1.	Situation, Mission, Execution, Administration & Logistics, Command & Signal (SMEAC)	26
2.	Basic Order & Annex Table of Contents.....	29
3.	Basic Order Template.....	40
4.	Annex A (Task Organization).....	48
5.	Annex D (Logistics/Combat Service Support)	49
	APPENDIX B: SUPPORTING CHECKLISTS.....	57
A.	SURVEY, LIAISON, & RECONNAISSANCE PARTY.....	59
B.	ADVANCED PARTY.....	60

APPENDIX C: CONTINGENCY CONTRACTING & HOST-NATION SUPPORT ..85	
A. CONCEPT OF LOGISTIC SUPPORT OPERATIONS.....85	
1. Contingency Contracting Planning Model86	
<i>a. Phase I: Mobilization and Initial Deployment.....87</i>	
<i>b. Phase II: Build-up and Stabilization.....88</i>	
<i>c. Phase III: Sustainment.....88</i>	
<i>d. Phase IV: Termination and Redeployment.....89</i>	
<i>e. Identifying Roles and Responsibilities in a Contingency Contracting Operation90</i>	
2. Basic Contingency Contracting Support Plan91	
3. Host-Nation Support.....92	
<i>a. Host-Nation Support Agreement.....92</i>	
<i>b. Host-Nation Support Plan94</i>	
LIST OF REFERENCES97	
INITIAL DISTRIBUTION LIST101	

LIST OF FIGURES

Figure 1.	USN Supply Corps (310X) Operational Career Path	4
Figure 2.	USMC Logistics Officer (MOS 0402) Career Path	5
Figure 3.	Supply Classifications.....	11
Figure 4.	Contingency & Crisis Action Planning Comparison	22
Figure 5.	Contingency Planning Phases	23
Figure 6.	Crisis Action Planning Phases	23
Figure 7.	Joint Planning Summary	24

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LIST OF TABLES

Table 1.	Items for Pre-movement Consideration	57
Table 2.	Survey, Liaison, & Reconnaissance Party (SLRP)/Advanced Party (AP) Checklist	61
Table 3.	Yoder Three-tier Model for Contingency Contracting Operations.....	90

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DEFINITIONS, ACRONYMS & ABBREVIATIONS

AAA	arrival and assembly area – An area in which a command is assembled preparatory to further action. In a supply installation, the gross area used for collecting and combining components into complete units, kits, or assemblies.
AABFS	amphibious assault bulk fuel system
AAV	amphibious assault vehicle
administrative loading	A loading system which gives primary consideration to achieving maximum utilization of troop and cargo space without regard to tactical considerations. Equipment and supplies must be unloaded and sorted before they can be used. Also called commercial loading.
administrative movement	A movement in which troops and vehicles are arranged to expedite their movement and conserve time and energy when no enemy interference, except by air, is anticipated.
advanced base	A base located in or near an operational area whose primary mission is to support military operations.
ADVON	advanced echelon
aerial port	An airfield that has been designated for the sustained air movement of personnel and materiel as well as an authorized port for entrance into or departure from the country where located. Also refers to port of debarkation (APOD) and port of embarkation (APOE).
airhead	A designated location in an area of operations used as a base for supply and evacuation by air.
ALERTORD	Alert Order
AMC	Air Mobility Command
annex	A document appended to an operation order or other document to make it clearer or to give further details.
AO	area of operations
AOR	area of responsibility

AP	Advanced Party
appendix	A document appended to an annex of an operation order, operation plan, or other document to clarify or to give further details.
ASP	ammunition supply point
ATO	air tasking order
AUTODIN	Automatic Digital Network
brigade	A unit usually smaller than a division to which are attached groups and/or battalions and smaller units tailored to meet anticipated requirements.
bulk cargo	That which is generally shipped in volume where the transportation conveyance is the only external container; such as liquids, ore, or grain.
C2	command and control
CAP	Combat Air Patrol
CBR	chemical, biological, radiological
CCIR	commander's critical information requirements – identified by the commander as being critical in facilitating timely information management and the decision-making process that affect successful mission accomplishment.
CCSP	contingency contracting support plan
CIS	critical incident stress
CJCS	Chairman Joint Chiefs of Staff
CMOC	Civil Military Operations Center
COA	course of action
COCOM	combatant commander

combat loading	The arrangement of personnel and the stowage of equipment and supplies in a manner designed to conform to the anticipated tactical operation of the organization embarked. Each individual item is stowed so that it can be unloaded at the required time.
combined	When two or more forces or agencies of two or more allies come together to form a military adherence.
COMCAM	combat camera
command and control	The exercise of authority and direction by a properly designated commander over assigned and attached forces in the accomplishment of the mission.
commander's estimate of the situation	A logical process of reasoning by which a commander considers all the circumstances affecting the military situation and arrives at a decision as to a course of action to be taken in order to accomplish the mission.
commander's intent	A concise expression of the purpose of the operation and the desired end-state that serves as the initial impetus for the planning process. It may also include the commander's assessment of the adversary commander's intent and an assessment of where and how much risk is acceptable during the operation.
common item	Any item of materiel that is required for use by more than one activity or Service.
common use	Services, materiel, or facilities provided by a Department of Defense agency or a Service on a common basis for two or more Department of Defense agencies, elements, or other organizations as directed.
concept of logistic support	A verbal or graphic statement, in a broad outline, of how a commander intends to support and integrate with a concept of operations in an operation.
CONOPS	concept of operations – A verbal or graphic statement, in broad outline, of a commander's assumptions or intent in regard to an operation or series of operations. The concept of operations frequently is embodied in campaign plans and operation plans; in the latter case, particularly when the plans cover a series of connected operations to be carried out simultaneously or in succession. The concept is designed to give an overall picture of the operation. It is included primarily for additional clarity of purpose.

CONPLAN	concept plan
contingency	Emergency involving military forces caused by natural disasters, terrorists, subversives, or by required military operations.
contracting officer	A U.S. military officer or civilian employee who has a valid appointment as a contracting officer under the provisions of the Federal Acquisition Regulation.
CONUS	continental United States
COR	Contracting Officer Representative
CP	command post – A unit’s or subunit’s headquarters where the commander and the staff perform their activities.
CSI	critical sustainability items
CSS	combat service support – The essential capabilities, functions, activities, and tasks necessary to sustain all elements of operating forces in theater at all levels of war. Combat service support encompasses those activities at all levels of war that produce sustainment to all operating forces on the battlefield.
CSSE	combat service support element
DEPORD	Deployment Order
DCS	deployment cycle support
DFSC	Defense Fuel Supply Center
DISN	Defense Information Systems Network
DLA	Defense Logistics Agency
doctrine	Fundamental principles by which the military forces or elements thereof guide their actions in support of national objectives. It is authoritative but requires judgment in application.
DSN	Defense Switched Network
DV	distinguished visitor

echelon	A subdivision of a headquarters or a separate level of command. As compared to a regiment, a division is a higher echelon; a battalion is a lower echelon.
EFDS	Expeditionary Force Deployment System
EOD	explosive ordnance disposal
EPW	enemy prisoner of war
EXORD	execute order
FEC	forward error correction
FM	field manual
FMF	Fleet Marine Force
force multiplier	A capability that, when added to and employed by a combat force, significantly increases the combat potential of that force and thus enhances the probability of successful mission accomplishment.
force protection	Actions taken to prevent or mitigate hostile actions against Department of Defense personnel, resources, facilities, and critical information.
FPAS	Force Protection Assessment Survey
FPO	Force Protection Officer
FRAGO	fragmentary order
GCPC	Government-wide Commercial Purchase Card
HNRS	host-nation religious support
HNS	host-nation support
HNSA	host-nation support agreement
HNSP	host-nation support plan
HUMINT	Human Intelligence
ICS	inter-service Chaplain support

IM	information management
IP	internet protocol
JFC	Joint Force Commander
JFSC	Joint Forces Staff College
JIB	Joint Information Bureau
Joint	Connotes activities, operations, organizations, etc., in which elements of two or more Services participate.
Joint doctrine	Fundamental principles that guide the employment of US forces in coordinated action toward a common objective. Doctrine contained in joint publications includes terms, tactics, techniques, and procedures. It is authoritative but requires judgment in application.
Joint force	A general term applied to a force composed of significant elements, assigned or attached, of two or more Services operating under a single joint force commander.
Joint logistics	The art and science of planning and carrying out, by a joint force commander and staff, logistic operations to support the protection, movement, maneuver, firepower, and sustainment of operating forces of two or more Services of the same nation.
JP	Joint Publication
JPEC	Joint Planning and Execution Community
JSCP	Joint Strategic Capabilities Plan
JTF	Joint Task Force
level-of-effort munitions	In stockpile planning, munitions stocked on the basis of expected daily expenditure rate, the number of combat days, and the attrition rate assumed, to counter targets the number of which is unknown.
LOC	lines of communication
logistic assessment	An evaluation of the logistic support required to support particular military operations in a theater, country, or area. The actual and/or potential logistic support available for the conduct of military operations either within the theater, country, or area.

LOGREF	MAGTF Logistics Reference
LZ	landing zone
MAGTF	Marine Air-Ground Task Force
MARFOR	Marine Corps Forces
MCDP	Marine Corps Doctrinal Publication
MCFSS	Marine Corps fire surface support
MCRP	Marine Corps Reference Publication
MCWP	Marine Corps Warfighting Publication
MEDEVAC	medical evacuation
MEF	Marine Expeditionary Force
METOC	meteorological and oceanographic
MHE	materials handling equipment
MIPR	Military Interdepartmental Purchase Request
MOU	memorandum of understanding
MPF	maritime pre-positioning force
MPS	maritime pre-positioning ships
MRE	meals ready to eat
MSR	main supply route
MSTP	MAGTF Staff Training Program
NAVFOR	Naval Forces
NCA	National Command Authority
NCF	Naval Construction Force
NCIS	Naval Criminal Investigative Service

NCW	Naval Coastal Warfare
NDP	Naval Doctrine Publication
NECC	Naval Expeditionary Combat Command
NEO	non-combatant evacuation operation
NMCB	Naval Mobile Construction Battalion
NOLSC	Naval Operational Logistic Support Center
NSCS	Navy Supply Corps School
NSE	Navy Support Element
NSFS	naval surface fire support
NSW	Naval Special Warfare
NTTP	Naval Tactics, Techniques, and Procedures
NWP	Naval Warfare Publication
OCE	officer in charge of the exercise
operational art	The employment of military forces to attain strategic and/or operational objectives through the design, organization, integration, and conduct of strategies, campaigns, major operations, and battles. Operational art translates the Joint force commander's strategy into operational design and, ultimately, tactical action, by integrating the key activities at all levels of war.
OPLAN	operation plan
OPORD	operation order
OPP	Offload Preparation Party
OPSEC	operation security
organic	Assigned to and forming an essential part of a military organization.
PAO	Public Affairs Office

PARC	Principal Assistant for Responsible for Contracting
PLAD	Plain Language Address Directory
PLANORD	Planning Order
POL	petroleum, oils, and lubricants
RADBN	Radio Battalion
RFI	requests for information
ROE	rules of engagement
RSO&I	reception, staging, onward-movement, and integration – A phase of force projection occurring in the operational area. This phase comprises the essential processes required to transition arriving personnel, equipment, and materiel into forces capable of meeting operational requirements.
SATCOM	satellite communications
scheme of maneuver	Description of how arrayed forces will accomplish the commander's intent. It is the central expression of the commander's concept for operations and governs the design of supporting plans or annexes.
seaport	A land facility designated for reception of personnel or materiel moved by sea, and that serves as an authorized port of entrance into or departure from the country in which located. Also refers to port of debarkation (SPOD) and port of embarkation (SPOE).
Service	Military Departments; Army, Navy & Marine Corps, and Air Force
Service-common	Equipment, material, supplies, and services adopted by a Service for use by its own forces and activities.
SIPRNET	Secret Internet Protocol Router Network
SITREP	situation report
SJA	Staff Judge Advocate
SLRP	survey, liaison, and reconnaissance party
SMEAC	situation, mission, execution, admin & logistics, command & signal

SOFA	Status of Forces Agreement
SSO	Special Security Office
supported commander	The commander having primary responsibility for all aspects of a task assigned by the JSCP or other joint operation planning authority. In the context of joint operation planning, this term refers to the commander who prepares operation plans or operation orders in response to requirements of the Chairman of the Joint Chiefs of Staff. In the context of a support command relationship, the commander who receives assistance from another commander's force or capabilities, and who is responsible for ensuring that the supporting commander understands the assistance required.
supporting commander	A commander who provides augmentation forces or other support to a supported commander or who develops a supporting plan. Includes the designated combatant commands and Defense agencies as appropriate. In the context of a support command relationship, the commander who aids, protects, complements, or sustains another commander's force, and who is responsible for providing the assistance required by the supported commander.
TALCE	tanker airlift control element – A mobile command and control organization deployed to support inter-theater and intra-theater air mobility operations at fixed, en route, and deployed locations where air mobility operational support is nonexistent or insufficient.
task force	A temporary grouping of units, under one commander, formed for the purpose of carrying out a specific operation or mission.
TLOC	Tactical Logistics Operations Course
TPFDD	time-phased force deployment data
TTP	tactics, techniques and procedures
USAID	United States Agency for International Development
WARNORD	Warning Order
WEAX	weather facsimile
WHNS	wartime host-nation support

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I. INTRODUCTION

A. OVERVIEW

This project addresses U.S. Navy expeditionary logistics, doctrine and how U.S. naval expeditionary logisticians are trained. The Navy is a Service is steeped in a history of ships, submarines, and aviation. The Navy also has a long record of providing outstanding logistic support to afloat units and squadrons. The Navy has historically emphasized traditional warfighting platforms and has not supported expeditionary combat forces to the same extent as traditional Navy units. The Navy has existing doctrine and well established procedural guidance for pre-deployment preparations and deployment sustainment of sea-going commands, shore-based units and establishments, and aviation squadrons. The Navy has not, however, placed the same emphasis on formalizing logistics doctrine and guidance for purely expeditionary, land-based combat elements, such as units of the Naval Expeditionary Combat Command (Naval Construction Force, Naval Expeditionary Logistic Support Group, Explosive Ordnance Disposal, and Riverine Forces) and Naval Special Warfare¹. Publications, instructions, and other organizational documents exist for supporting these forces, but they are typically community or unit-type specific and are doctrinal in nature, but are not Naval Doctrine. Additionally, a lack of Navy-wide and Joint doctrinal understanding and implementation for expeditionary forces has led to vague authorities, relationships and responsibilities.²

Each community varies in its philosophy and methodology in preparation and deployment support and each command within the same community will often have instructions that are independent of each other. It is critical for the congruence of expeditionary forces and continuity of training logistics professionals that all naval

¹ Naval Special Warfare (NSW) is subordinate to Special Operations Command, a unified combatant commander, and does not fall under the operational control of the U.S. Navy. NSW has logistic organizations, policies and procedures that vary from conventional U.S. Navy units, but is provided logistic support and administrative support from many of the same supporting agencies as conventional Navy units. NSW is complemented with U.S. Navy Supply Corps and enlisted personnel with extensive logistics experience.

² John Lugo, et al. "Logistic Support of Naval Expeditionary Units."

expeditionary forces have similar logistic operations. To meet this end, it is important to have publications, instructions, and guidance that all stem from the same overarching documents with developed, sound practices to support the doctrine in much the same way other communities and type commanders support subordinate units.

The Navy has recognized in recent years the importance of supporting expeditionary forces as these units have increased involvement in current military operations, implementing National Military Strategy, and prosecuting the Global War on Terror. The logistics professionals who have been given the task of providing sustainment for these units face exceptional challenges due to the high operational tempo and unique aspects of expeditionary forces. Preparing these logistics professionals for supporting expeditionary forces is also unique since these challenges can vary greatly from previous experiences that a Navy logistician has likely encountered onboard a ship or at a shore station. Naval expeditionary forces frequently operate physically removed from traditional Navy logistics support infrastructure and may need to rely on other Services for support, which also increases the level of difficulty. Maximizing the utility of support mechanisms outside the normal navy structure is crucial and not always understood by naval logisticians.

Training for expeditionary logisticians is often on-the-job and frequently on-the-fly. Current, formal logistics training does not address the differences between the functions of an afloat or shore unit and that of an expeditionary unit. Formal training for expeditionary logisticians is not in the common career progression and is not mandated for Navy personnel who are ordered to, or currently serving in, naval expeditionary logistics billets. The only existing platform in the Navy that trains expeditionary logisticians is a two-week, reserve-centric course that is offered periodically throughout the year through the Navy Supply Corps School.³

The Navy fills a majority of expeditionary logistics billets with Supply Corps Officers and senior enlisted personnel in supply ratings. Even with this heavy involvement, the total number of expeditionary billets to which Supply Corps Officers

³ “Introduction to Expeditionary Logistics.”

are assigned is estimated at 584, which represents approximately 2% of the total active duty, Supply Corps Officer Force.⁵ The actual figure may be much higher, but without a generally accepted definition and determination of what constitutes an expeditionary logistics billet, there are several expeditionary logisticians in the Navy that are currently unrecognized as such. The estimate of 2% is small, but it is not insignificant. It does bring into question, however, the level of effort and amount of resources that should be dedicated towards creating a pipeline or a training depot for expeditionary logisticians in the Navy. The common career path for a Supply Corps Officer, in particular, would permit the officer to spend no more than a few tours within expeditionary logistics because of the wide range of skills and experience tours that the Supply Corps Officer is expected to attain in a finite career. Figure (1) outlines a rough sketch of a recommended career path for Supply Corps Officers. This career diversity does not permit a Supply Corps Officer to spend a sufficient number of tours to become highly proficient in expeditionary logistics and requires training that is beyond the ordinary training regimen.

Other Services' logisticians; U.S. Marine Corps in particular, spend a significant percentage of their career focused on expeditionary logistics and combat service support because of the nature of the Service. Figure (2) is a recommended career path for Marine Corps Logistics Officers. Marines and the U.S. Army alike have very robust training programs that encompass most, if not all, aspects of expeditionary logistics and combat service support.⁶ The question that should be asked is why the Navy and the Supply Corps have not embraced training its expeditionary logistics professionals with other Services much the same way Marines have trained and learned core competencies from

⁴ The actual number of active duty Supply Corps Officers serving in expeditionary logistics billets is not currently tracked by Navy Personnel Command, Supply Corps Office of Personnel. The estimation is derived by the following: Naval Construction Force; 10 active duty battalions with 2 officers each (20), divisional and regimental staff (4) – Naval Expeditionary Combat Command; Explosive Ordnance Disposal Groups, Units and Mobile Diving and Salvage Units (10), Naval Coastal Warfare (6), Naval Cargo Handling Battalion (8) – Naval Special Warfare; Logistic Support Units (10).

⁵ “Navy Supply Corps Office of Personnel Monthly Status Report – April 2006” reports 2700 active duty Supply Corps Officers including Full Time Support and Limited Duty Officers.

⁶ LOGREF and U.S. Army Logistics Management College.

the Navy and the Supply Corps.⁷ The concept of training logisticians in a cooperative, Joint environment is also in alignment with National Military Strategy.⁸

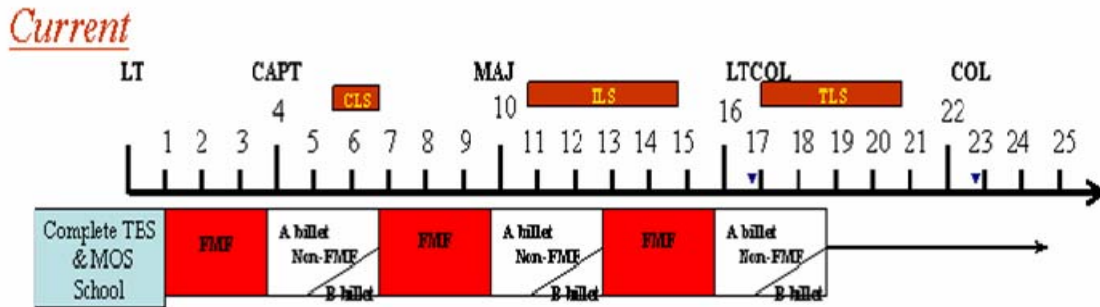
RANK	YEAR	TOUR
FLAG	31	FLAG TOURs
	30	
	29	
	28	
	27	
CAPT	26	Joint (if not JSO yet)/
	25	Policy/Program level/Command tour
	24	Joint (if not JSO yet)/
	23	Policy/Program level/Command tour
CDR	22	0.5 Operational Tour or other tough/visible tour
	21	
	20	
	19	
	18	
LCDR	17	Joint/OPLOG/Policy Tour
	16	SENIOR SVC COLLEGE/JPME II
	15	Joint/OPLOG/Operational Tour (2 years if operational)
	14	
	13	
12		
11		
LT	10	Joint/OPLOG/Operational Tour (2 years if operational)
	9	PG SCHOOL (3212 - OR, 3121 - OL and 1307P - KU FUELS)
	8	2nd Operational Tour
	7	SHORE / JOINT OP LOG INTERN
	6	
5		
LTJG	4	Operational Tour
CHS	3	CHS

Figure 1. USN Supply Corps (310X) Operational Career Path⁹

⁷ Navy Supply Corps School, Athens, GA offers the primary course of instruction for several Marine Corps Aviation occupational specialties. Course offerings can be found at the following link, <https://www.npsc.navy.mil/css/nscs/default.cfm?fa=training.listRegular>.

⁸ JP 4-0 and Joint Vision 2020.

⁹ “Supply Corps Officer Career Paths.”



Abbreviations:

- | | |
|--|----------------------------------|
| CS – Combat Support | CSS – Combat Service Support |
| CLS – Career Level School | ILS – Intermediate Level School |
| TLS – Top Level School | TBS – The Basic School |
| MOS – Military Occupational Specialty | FMF – Fleet Marine Force |
| B-billet – Not designated by primary MOS | Non-FMF – Non Fleet Marine Force |

Figure 2. USMC Logistics Officer (MOS 0402) Career Path¹⁰

B. PURPOSE

This professional report is entitled “A Handbook for Complementing and Supporting Land Forces” because it is intended to be a simple, easy to read layout that will serve as a map to understanding Joint and expeditionary logistics planning and execution. The report will augment the Joint operational logistics planning process, but will not supplant professional military education because of the relatively narrow scope of the report. The report is written in response to a perceived shortfall of training in doctrine, professional development, and practical experience of expeditionary logisticians within the Navy. This report is hereby referred to as the “Logistics Handbook” and will provide the naval expeditionary logistician with a simple, easy-to-use reference when deciphering and understanding doctrine becomes unwieldy and local instructions and guidance do not fully address given pre-deployment, sustainment, or embarkation and movement situations. The Logistics Handbook will offer insight into Joint doctrine, but will focus on naval expeditionary forces because guidance of this nature does not exist elsewhere. Other Services have published handbooks that are designed to provide the same or similar condensed guidance; however, these texts lack a naval flavor and focus

¹⁰ “USMC Logistics Officer CS/CSS Career Progression.”

on parochial practices within those Services. The Logistics Handbook is not official direction and thus should not be taken as such. It is, however, sponsored by the Naval Supply Systems Command, Naval Operations Logistics Support Center (NOLSC), Norfolk, Virginia and is considered to be subject matter expert material. The Logistics Handbook should be coupled with direction and guidance from formal authorities and referred to for quick reference or perhaps when conflicts in direction or judgment arise.

The research for this project consisted of an explorative review of Navy, Marine Corps, Army, Joint publications and instructions, and Naval Postgraduate School lecture material that are directly or indirectly related to expeditionary warfare and logistics support of expeditionary forces. The purpose of this document review was to extract useful information and practices utilized by the Services, commands, or agencies that sponsored the document. The overarching project concept is to consolidate guidance and direction from various supported and supporting commands throughout the Department of Defense, clarify the guidance when necessary, and consolidate the guidance into one, easy to use, Logistics Handbook for Navy expeditionary logisticians.

The Logistics Handbook contains the essentials for the expeditionary logistician; language, acronyms, and a “how-to” guide for working with other Services in the Joint world of logistics support. The Logistics Handbook addresses the following:

- *Operation Order (OPORD)*. An abridged guide to understanding and writing a common, five-paragraph, Situation, Mission & Execution, Administration & Logistics, Command & Signal (SMEAC) format and the process behind its development.
- *Checklists*. Pre-deployment and sustainment, Survey Liaison Reconnaissance Party (SLRP) & Advanced Party (AP) checklists that can be used by any sized unit and any level in the chain of command.
- *Contingency Contracting Model & Host-nation Support*. Contingency contracting and host-nation support is an integral part of modern expeditionary deployments. Having an understanding of contingency contracting model and host-nation support and integrating these concepts into training and developing support plans is an important step in establishing standardized supporting procedures.

The author and the lead advisor of this project have combined personal experience of more than eight years of expeditionary logistics experience with four different communities and five different commands. The author and the lead advisor have imparted their collective experience and opinions to the achievement of identifying the best theories and practices for inclusion in the Logistics Handbook.

C. ORGANIZATION

The Logistics Handbook is arranged as appendices to allow for easy access to pertinent topics and mediums that are indirectly related. The appendices make up the preponderance of the Logistics Handbook.

- The first appendix provides an example of a partial Operation Order (OPORD). An OPOrd is the formalized message or directive from a higher headquarters that gives instruction to subordinate commands and identifies supported and supporting relationships between military elements, governmental agencies, and non-government organizations. A complete OPOrd contains a multitude of sections, annexes, and appendices that cover every imaginable aspect of a military operation. Annex A to an OPOrd contains the organizational structure for a military operation and Annex D addresses logistic specific issues. These two annexes are the only examples included in the Logistics Handbook since they are most commonly used or written by the naval expeditionary logistician.

- The second appendix is a collection of checklists that will provide a starting point for planning and executing the logistics of an operation.

- The third appendix presents an adaptation of the *Yoder Three-tier Model for Optimal Planning and Execution of Contingency Contracting*. The *Yoder Model* recommends a defined establishment, a hierarchical structure, and responsibilities that a large-scale contingency contracting component would provide to a combatant commander. The *Yoder Model* has a great deal of merit, but the complete model is outside the scope of the Logistics Handbook and will be used to discuss and develop a contingency contracting plan that fits the scope and responsibility of the unit or taskforce level naval expeditionary logistician. The third appendix also covers the concept of host-

nation support (HNS). HNS is the ability and willingness of a foreign, sovereign entity to provide contracted or in-kind support to U.S. forces while they are operating on foreign soil.

D. NAVAL EXPEDITIONARY LOGISTICS

1. Defined

A number of definitions can be found for “expeditionary logistics” in various military instructions and published material. Technically, logistics is defined as “the aspect of military operations that deals with the procurement, distribution, maintenance, and replacement of materiel and personnel,” and “the management of the details of an [military] operation.”¹¹ Expeditionary describes an action that is “sent on or designed for military operations abroad.”¹² The notion of expeditionary logistics can expand these definitions to include materiel re-supply and the movement, berthing, messing or feeding, and providing for the quality of life of personnel. These definitions are not limited to the size of the element that is supported. Expeditionary logistics is applied to any sized unit, from a fire team, to a brigade and larger, and at any level, including strategic, operational or tactical. The Logistics Handbook assumes that the reader is a logistician in a battalion or taskforce size element and is concerned primarily with operational and tactical planning and execution.

The terms “naval” or “navy” expeditionary logistics is dependent upon the type of unit that is supported. “Naval” indicates that the unit or units supported is comprised of naval forces, which can be made up of any sea-going service, supporting forces, agencies, and is most commonly Navy and Marine Corps. “Navy” is used to imply that the unit is almost entirely Navy personnel. For the purpose of the Logistics Handbook, the term “naval” will be used exclusively when used in the context of expeditionary logistics. “Navy” will be reserved to indicate that an idea or concept is strictly intended for, or written by, the Navy or the Department of the Navy.

¹¹ The American Heritage Dictionary.

¹² Ibid.

2. Functional Areas

At the strategic or operational level, a Logistics Officer may be chiefly concerned with unit movement and sustainment of forces, but the tactical Logistics Officer will deal more with daily support operations. The tactical expeditionary logistician has many of the same responsibilities as the Supply Officer afloat. The expeditionary command may have subject matter experts, similar to an afloat command, whose primary responsibility is to support the command in each functional area. Regardless of who wears the organizational hat for a functional area, it is ultimately the responsibility of the Logistics Officer to attend to the needs of each functional area and have a solid foundation and understanding of them. The functional areas of logistics¹³ are the broad make-up of the naval expeditionary logistician areas of responsibility. The functional areas are: supply, maintenance, transportation, engineering, health and other logistic services.

a. Supply

Supply is comparable to the function of materiel support that is commonly associated with a Supply Department afloat. This includes ordering, procurement, receipt, stowage, inventory control, and disposition of repairables and consumables. Supply materiel is grouped into 10 separate classifications for management purposes. It is important for the naval expeditionary logistician to know and understand these classes of supply because this is the language of logistics in other Services and in the Joint arena. The classifications are listed in Figure (3).¹⁴

b. Maintenance

Maintenance includes all actions that encompass preservation, repair, and reliability of any system. This also applies to any organization that is responsible for policy, procedure, or activity that is related to equipment maintenance.

c. Transportation

Transportation encompasses the movement of personnel and materiel from point to point. These points may be ports of embarkation, debarkation, and include inter-

¹³ NDP 4.

¹⁴ Ibid.

theater or intra-theater locations. Strategic, operational, and tactical transportation provide for the deployment, sustainment, and redeployment of any unit.

d. Engineering

Expeditionary engineering is performed primarily by elements of the Naval Construction Force (NCF), commonly known as “Seabees.” Individual Seabees may also be attached to expeditionary units other than NCF. Seabees execute rapid runway repair, facility damage repair, combat engineering, vertical and horizontal construction, maintain facilities ashore, conduct logistics-over-the-shore, and defensive combat maneuvers.

e. Health Services

Medical, dental, and all health related facilities are included in the functional area of health services. The specific functions performed can include; health maintenance, treatment of casualties, medical evacuation, entomology, food service sanitation, and medical readiness of personnel. This includes combat and non-combat

f. Other Logistic Services

Services included in this catch-all functional area include; postal services, food service, billeting, disbursing, legal services, barber, laundry, exchange services, and any administrative function that promotes good order, discipline and morale.

Symbols		Subclasses	
CLASS I			A - NONPERISHABLE C - COMBAT RATIONS R - REFRIGERATED S - NONREFRIGERATED W - WATER
CLASS II			A - AIR B - GROUND SUPPORT MATERIEL E - GENERAL SUPPLIES F - CLOTHING G - ELECTRONICS M - WEAPONS T - INDUSTRIAL SUPPLIES
CLASS III			A - POL FOR AIRCRAFT W - POL FOR SURFACE VEHICLES P - PACKAGED POL
CLASS IV			A - CONSTRUCTION B - BARRIER
CLASS V			A - AIR DELIVERY W - GROUND
CLASS VI			
CLASS VII			A - AIR B - GROUND SUPPORT MATERIAL D - ADMIN VEHICLES G - ELECTRONICS K - TACTICAL VEHICLES L - MISSILES M - WEAPONS, N - SPECIAL WEAPONS T - INDUSTRIAL MATERIAL X - AIRCRAFT ENGINES
CLASS VIII			A - MEDICAL MATERIAL B - BLOOD/FLUIDS
CLASS IX			A - AIR B - GROUND SUPPORT MATERIAL D - ADMIN VEHICLES G - ELECTRONICS K - TACTICAL VEHICLES L - MISSILES M - WEAPONS, N - SPECIAL WEAPONS T - INDUSTRIAL MATERIAL X - AIRCRAFT ENGINES
CLASS X			

Figure 3. Supply Classifications

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II. RECOMMENDATIONS

A. ANALYSIS

1. Naval Doctrine

Logistics is not just the mission of supporting and re-supplying armies and navies, it is also part of operational art.¹⁵ According to Joint logistics doctrine, logistics is the creative use of resources and limitations to achieve a desired end-state.

The art of logistics is how to integrate the strategic, operational, and tactical sustainment efforts within the theater, while scheduling the mobilization and deployment of units, personnel, and supplies in support of the employment concept of a geographic combatant commander. The relative combat power military forces can bring to bear against an enemy is constrained by a nation's capability to deliver forces and materiel to the required points of application across the range of military operations.¹⁶

Doctrine is also an art form. Creating doctrine requires a degree of experience and knowledge that can be shaped and molded into a useful document intended to serve a greater purpose. Very little has been written on naval expeditionary logistics and the doctrine that does exist is not widely discussed amongst naval expeditionary logisticians. The theory espoused in the few existing publications is well written and very informative to a logistician of any experience level. The dilemma is reconciling naval expeditionary doctrine with a perceived disconnect between doctrine and applicable community level and command level instruction or guidance.

Doctrine is difficult to directly apply to all communities and commands within the Navy because of the very different missions and structures of each community. This can also be said of other Services. The Army and Marine Corps, in particular, have closed the gap between doctrine and applicable instruction or guidance through descending echelons of publications. Each echelon provides a greater level of detail at each subsequent level. Command instructions are then rooted in guidance from a higher

¹⁵ operational art — The employment of military forces to attain strategic and/or operational objectives through the design, organization, integration, and conduct of strategies, campaigns, major operations, and battles. Operational art translates the Joint force commander's strategy into operational design and, ultimately, tactical action, by integrating the key activities at all levels of war. JP 3-0.

¹⁶ JP 4-0, Chapter I, par. 1a.

authority or publication, which is also founded in guidance from a more comprehensive source. The Navy is distinctly lacking in this doctrinal structure for expeditionary logistics and combat service support.

Naval expeditionary logistics does not require a new infrastructure or a new set of publications that mirror other Services. To create such an establishment or encyclopedia of references would require too much from the Navy. The current resources are too slim, the task too daunting, and the number of Forces affected are simply too small to justify re-creating what already exists within other Services. A reasonable solution that would accomplish the same end-state is to adapt current Marine Corps publications and guidance with modifications that reflect the differences between the Navy and Marine Corps. It is not uncommon for the Services within the Department of the Navy to share common resources if such coordination and sharing of resources makes sense. Creating co-sponsored Navy-Marine Corps expeditionary logistics publications is a prime example when such a cooperative extension would benefit both Services in the following ways:

- The Navy could provide its logistics professionals additional guidance and further instruction in expeditionary logistics and combat service support without stretching its own resources.
- The Marine Corps, who frequently operates with NCF and units of the Naval Expeditionary Combat Command, would be a logistics force multiplier if Supply Corps Officers and senior enlisted logisticians were trained to understand and better coordinate with Marine forces.

2. Training

It is imperative that the Navy train its logistics professionals in the art of expeditionary logistics. Supply Corps Officers and senior enlisted logisticians are provided with the basics and the background in general supply, food service, disbursing, transportation, and financial management through formal education and experience tours. What is lacking in the professional education of the officers and enlisted logisticians in the naval expeditionary arena is the exposure to Joint logistics; the cornerstone of unit movement and sustainment.

There are a number of ways to fill the educational void that is created when a Logistics Officer with no expeditionary experience is assigned to an expeditionary unit for the first time.

- Navy Supply Corps School (NSCS), Athens, Georgia teaches a two-week, “Introduction to Expeditionary Logistics” course of instruction. This course covers the basics of Joint operations and planning, missions of various naval expeditionary units, and the broad spectrum of expeditionary logistics. This course is open to all Navy personnel requesting the class, but it is coordinated by the NSCS Reserve Programs Officer and is primarily intended for reserves on annual training.¹⁷

- Marine Corps Base Quantico, Virginia is home to several logistics training schools and programs. Among the applicable training options at Quantico are:

- ◆ The Marine Air-Ground Task Force (MAGTF) Staff Training Program (MSTP). The mission of MSTP is “to provide training in MAGTF, Joint and Combined warfighting skills, within the Joint and Combined environment, in order to improve the warfighting skills of senior commanders and their staffs and to provide feedback into the Expeditionary Force Development System (EFDS).” A variety of self-paced presentations can be downloaded. These presentations offer a great deal of information regarding all phases of logistic support and Joint operations.¹⁸

- ◆ The School of MAGTF Logistics offers a two-week course entitled “Tactical Logistics Operations Course (TLOC).” TLOC educates logisticians in tactical-level logistics operations to prepare them for MAGTF command and staff billets.¹⁹

- The Army Logistics Management College, Fort Lee, Virginia offers a variety of short courses that are from two to four weeks in duration. Relevant course titles are “Army Logistics Introductory Course,” “Joint Course on Logistics,” and

¹⁷ “Introduction to Expeditionary Logistics.”

¹⁸ MAGTF MSTP.

¹⁹ Marine Corps University MAGTF Logistics.

“Multinational Logistics Course.” These courses vary in emphasis, but all of them will present a student with a Joint perspective to logistics.²⁰

- Joint Forces Staff College (JFSC) in Norfolk, Virginia specializes in Joint education of military and logistics professionals. JFSC offers several resident courses, including; “Joint Course on Logistics,” “Joint Planning Orientation Course,” and a web-based tutorial called “Joint Task Force Fundamentals (JTF 101).” All of these classes teach Joint operations and logistics to all Services.

JFSC teaches Navy personnel the basics of Joint logistics, but JFSC does not offer courses of instruction that directly pertains to expeditionary logistics. The only expeditionary logistics related instruction that is the currently offered to Navy personnel is taught at NSCS. None of the Service taught schools or programs are designed to inculcate the Services in a Joint climate. Ad hoc training for expeditionary logisticians should not be considered acceptable for the Navy and learning about Joint logistics is not the same as training for Joint logistics. Service specific requirements must be recognized in a training pipeline, but the core of expeditionary logistics is Joint support and operations. The core of expeditionary training should therefore be done jointly.

A Joint Service expeditionary logistics course should be developed and mandated for all entry and mid-level logistics professionals prior to assignment to an expeditionary unit as a logistics professional. Until such a course can be established, the Supply Corps should work with other Services to take advantage of existing training and courses of instruction.

B. EXPANDING NAVAL LOGISTICS

The Logistics Handbook is not exhaustive of all available expeditionary logistics instructions and guidance, nor is it all-encompassing of every facet of expeditionary logistics and the world of combat service support. If it were completely comprehensive, the Logistics Handbook would be too cumbersome for practical use and perhaps even intimidating for the novice naval expeditionary logistician. The Logistics Handbook is

²⁰ Army Logistics Management College.

instead intended for the naval expeditionary logistician who has not had the benefit of years of experience or formal training. However, it will also be of use to the Logistics Officer or senior enlisted logistician that has served at an expeditionary command and would like additional insight into the topics covered in the Logistics Handbook. The Logistics Handbook will aid in applying judgment for effective decision making.

Although this project was initiated to meet partial requirements for a Master's of Business Administration, completion of this report is not the end of the research or the author's interest in the subject of naval expeditionary logistics. This report is expected to progress and mature as concerned parties within the greater naval expeditionary warfare and logistics communities take an active interest in its development.

1. Additional Reading

Suggested readings to further educate and familiarize the naval expeditionary logistician are:

- Joint Publication 1-02 – Department of Defense Dictionary of Military and Associated Terms
- Joint Publication 3-0 – Doctrine for Joint Operations
- Joint Publication 4-0 (series) – Doctrine for Logistic Support of Joint Operations
- Joint Publication 5-0 – Doctrine for Planning Joint Operations
- Chairman Joint Chiefs of Staff Manual (CJCSM) 3122.01A *Joint Operation Planning and Execution System (JOPES) Vol. I, Planning Policies and Procedures*
- Naval Doctrine Publication (NDP) 4 – Naval Logistics
- Navy Warfare Publication (NWP) 4-01.1 – Navy Advanced Base Logistics Operations, Naval Training, Tactics and Procedures (NTTP 4-01.1)
- Marine Corps Doctrinal Publication (MCDP) 4 – Logistics
- MCDP 5 – Planning

- Marine Corps Warfighting Publication (MCWP) 4-1 – Logistics Operations
- MCWP 4-11 – Tactical-Level Logistics
- MCWP 4-12 – Operational-Level Logistics
- MCWP 5-1 – Marine Corps Planning Process
- Marine Corps Reference Publication (MCRP) 4-11A, Vol. I – Combat Service Support (CSS) Field Reference Guide
- Army Field Manual (FM) 3-0 – Operations
- Army FM 3-101-1 – Squad/Platoon Operations TTP
- “Army Command and General Staff College, Student Text (ST) 101-6 – Combat Service Support Battle Book”

2. Research Opportunities

Additional research and development of the Logistics Handbook can include, but is not limited to:

- Expanding the Logistics Handbook to include a broader spectrum of embarkation, sea and airborne transportation, reach back support, encampment, and general combat service support
- Integrating NSCS, Athens, Georgia course of instruction “Introduction to Expeditionary Logistics” with Joint Forces Staff College, Marine Corps Base Quantico, and Army Quartermasters logistics courses or creating a new Joint Expeditionary Logistics course of instruction that encompasses Joint and Service specific nuances of expeditionary logistics and combat service support
- Modify Naval Postgraduate School Logistics Management curricula to include a broader spectrum of expeditionary logistics
- Developing useful, working documents that will enhance the planning process similar to what Marine forces have available in “A MAGTF’s Logistics Reference”

APPENDIX A: THE OPERATION ORDER

A. OPERATIONS PLANNING – PROCESS & INTENT

To be a successful commander at any echelon, you had better think about logistics and you had better make sure that when you are ready to go you have enough fuel, beans, bullets, and bandages – all of the things to sustain your forces.

General Carl E. Mundy, Jr., USMC
Commandant of the Marine Corps, 1993

One significant difference between the Supply Officer afloat and the naval expeditionary Logistics Officer is the degree of involvement in the complete operations planning process. It is essential that the Logistics Officer stay keenly attuned to the proceedings and progress of any plan. The quote from General Mundy alluded to the importance of logistics; the Commander must know as much about logistics as the Logistics Officer. Likewise, it serves the Logistics Officer well to know as much about the operations as the Commander. The good Logistics Officer attends every planning session and has a voice in every decision when the logistics of the operation could have an affect or be affected by the decision. Operations and missions that cannot be logistically supported are doomed from the onset. It is the Logistics Officers duty to ensure that the commanders and planners are not setting themselves up for failure by leaving logistics out of the operational equation.

Logistics and operations planning of any Service have a foundation in Joint planning. Joint doctrine is the genesis of all Service-specific doctrine. Likewise, Service-specific planning processes are derived from the Joint plans development process. All Services have developed doctrine and planning processes that are very similar to each other because of the Joint origins. The differences in each Service's doctrine and planning process results from the differences in Service discourse culture, mission, and operating environment. Terminology and planning phases in the processes and the resulting documents vary slightly from Service to Service, but the process and intent of the documents remains the same. Logistics planning can and will be done in all

operational phases. A study of Joint Publication 5-0, Doctrine for Planning Joint Operations is required to completely understand all operational phases and to acquire the bigger picture of operational plans.

There are two distinct methods for developing operational plans; contingency and crisis action planning. A third type, exercise planning, can resemble either contingency or crisis action planning. Exercise planning will vary depending upon the breadth, scope, and the intent of the Officer in Charge of the Exercise (OCE). The OCE will determine if the exercise is based upon an Operation Plan (OPLAN)²¹ or Concept Plan (CONPLAN),²² which will require a process similar to contingency planning, or if the exercise is to be hastily formed and executed, which will require crisis action planning. The Logistics Handbook will not focus on exercise planning because of the similarity with the other planning methods.

1. Contingency & Crisis Action Planning

In any given planning situation, you have all the time you have.

Lieutenant Colonel David Burwell, USA

The definitions of “contingency planning” (formerly known as deliberate planning) and “crisis action planning” are inherent to the titles. Contingency and crisis action planning have some similarities, but follow a different progression of phases. The most significant difference between the two methods is with contingency planning. The time dedicated to creating the contingency plan is spent well in advance of a mission or operation and in an assumed or anticipated environment. Crisis action planning is done in response to an unexpected incident. In the event that either planning strategy is called upon, the amount of time to plan for a mission will be dictated by the commander and, as Colonel Burwell alludes, the time that a plan takes to construct is predicated by the

²¹ “An OPLAN is complete and detailed, containing a full description of the concept of operations and all required annexes with associated appendices. It identifies the specific forces, functional support, deployment sequence, and resources required to execute the plan and it provides closure estimates for movement into the theater. An OPLAN [can be developed] into an operation order.” – JP 5-0

²² “A CONPLAN is an [OPLAN] in an abbreviated format that would require considerable expansion or alteration to convert it into an OPLAN or operation order. A CONPLAN contains the combatant commander Strategic Concept and those annexes and appendices that are either required or deemed necessary by the combatant commander to complete planning.” – JP 5-0

amount of time that a planning staff has before it needs to be put into action. Figure (4) details several more differences between the two types of planning from a strategic level. Figures (5) and (6) provide a big picture assessment of the planning phases in both contingency and crisis action planning. Figure (7) offers an illustrative depiction of how the two planning processes tie into one another in a “Joint Planning Summary.”

Contingency planning results in an OPLAN or CONPLAN and is initiated in response to a perceived threat. OPLANS and CONPLANS are written, periodically reviewed and updated in the event that they may eventually need to be executed. Crisis action planning directly produces an Operation Order (OPORD) because crisis action planning was initiated in response to an actual threat or event and not just a potential threat. *Joint Publication 5-0; Doctrine for Planning Joint Operations* covers each phase in both types of planning in great detail. Service specific doctrinal planning publications listed in the “Additional Reading” section also provide detail of the planning phases that is beyond the scope of the Logistics Handbook.

	Crisis Action Planning	Contingency Planning
<i>Time Available to Plan</i>	Up to 12-months	18-24 months
<i>Joint Planning & Execution Community (JPEC) Involvement</i>	For security reasons, possibly very limited using close-hold procedures	Participates fully
<i>Phases</i>	6 Phases from Situation Development to Execution	5 Phases from Initiation to Supporting Plans
<i>Document Assigning Tasks</i>	Warning Order to combatant commander (COCOM); COCOM assigns tasks with Evaluation Request message	Joint Strategic Capabilities Plan (JSCP) to COCOM: COCOM assigns tasks with planning or other written directive
<i>Forces for Planning</i>	Allocated in the Warning, Planning, Alert, or Execute Order	Apportioned in JSCP
<i>Early Planning Guidance to Staff</i>	Warning Order from Commander, Joint Chiefs of Staff (CJCS); COCOM Evaluation Request	Planning Directive issued by COCOM after planning guidance step of concept development phase
<i>Commander's Estimate</i>	Communicates recommendations of COCOM to the CJCS/National Command Authority (NCA)	Communicates the COCOM decision to staff and subordinate commanders
<i>Decision on COA</i>	NCA decide course of action (COA)	COCOM decides COA with review by CJCS
<i>Execution Document</i>	Execute Order	When an operation plan is implemented, it is converted to an OPORD, and executed with an Execute Order
<i>Products</i>	Campaign plan (if required) with supporting OPORD, or OPORD with supporting functional plans	OPLAN or Concept Plan (CONPLAN) with supporting plans or functional plans

Figure 4. Contingency & Crisis Action Planning Comparison²³

²³ E. Cory Yoder. "Contingency Contracting Student Handbook..."

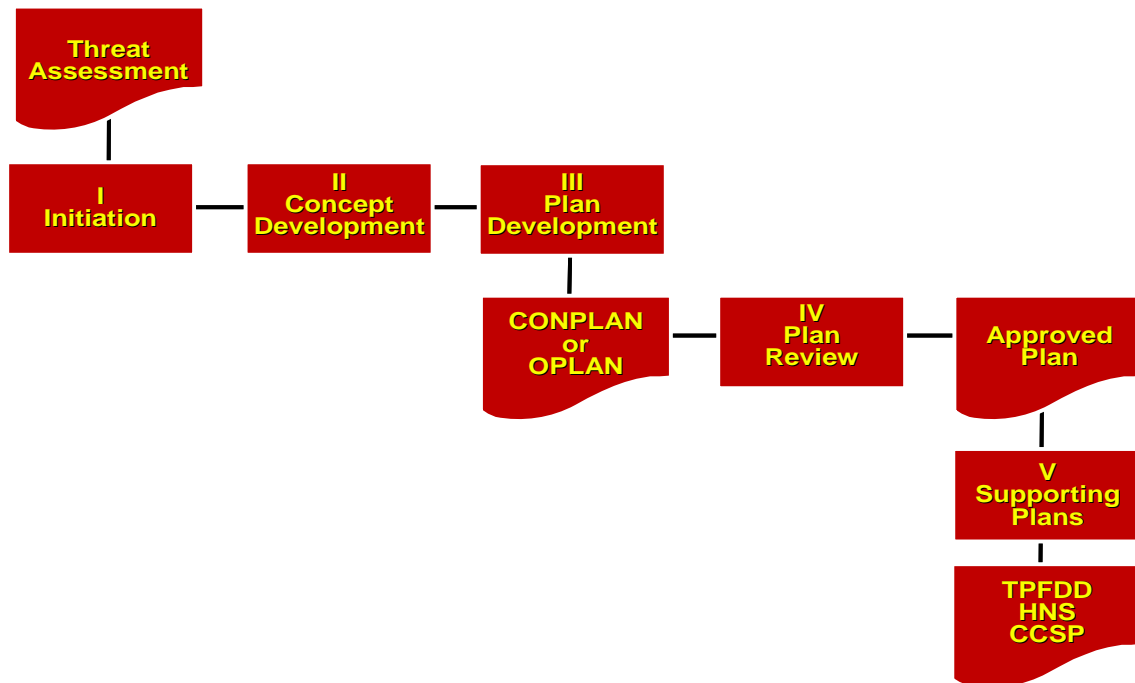


Figure 5. Contingency Planning Phases²⁴

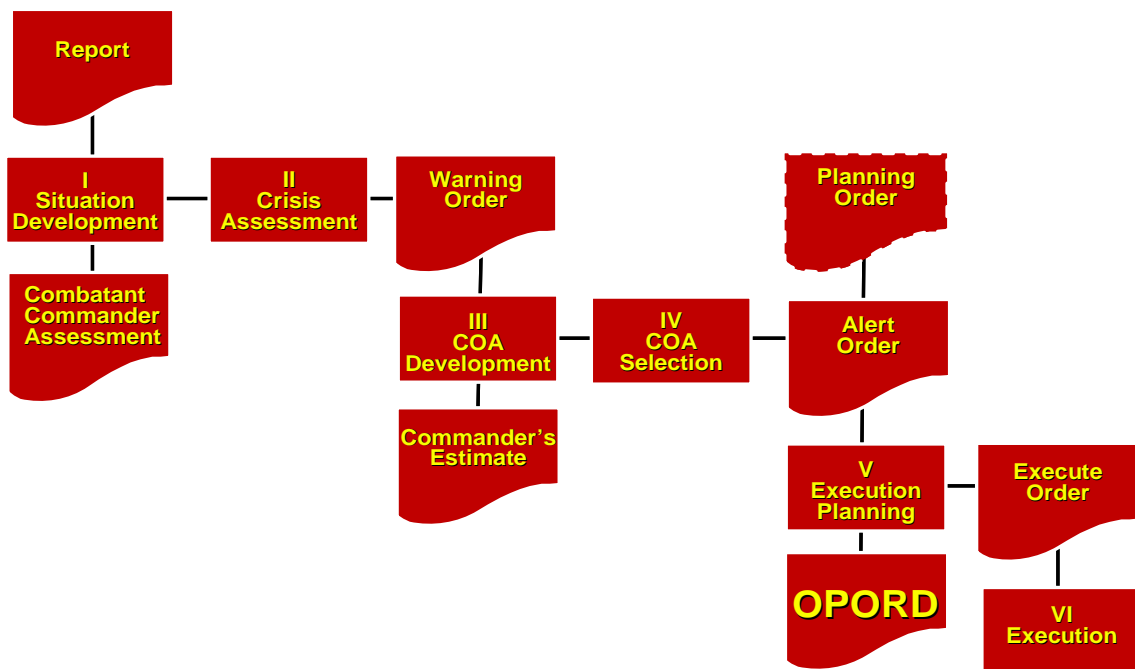


Figure 6. Crisis Action Planning Phases²⁵

²⁴ Adapted from Joint Pub 5-0.

²⁵ Mike McMaster. "Orders and Phasing."

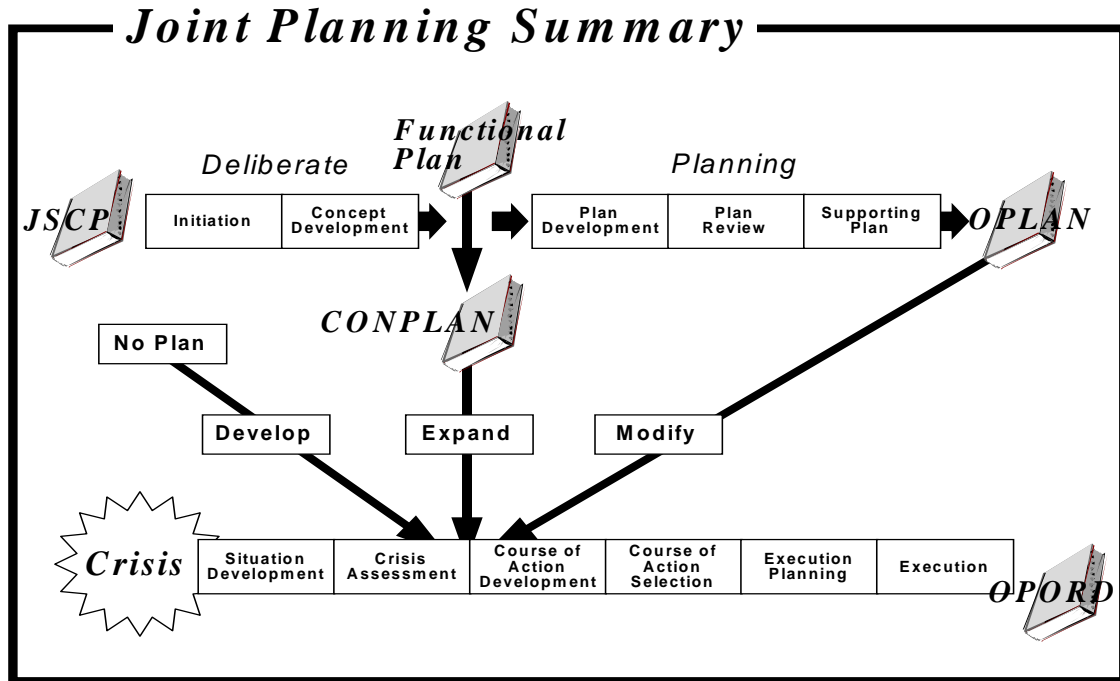


Figure 7. Joint Planning Summary²⁶

2. Orders

Once expansion of the CONPLAN, OPLAN, or crisis action planning has been initiated to develop a course of action (COA), there is a variety of orders that will be written or received at each echelon in the chain of command. The progression in which the orders are written or received varies, however, depending upon the nature and urgency of the operation. Orders may not come as separate, distinct commands and may be embedded in other orders. The all encompassing order, the OPORD, is the final product of the planning process and will be generated prior to executing the plan. The OPORD is covered in more detail in a later section of this appendix.

a. Warning Order

The first in the sequence of orders is typically the Warning Order (WARNORD). The WARNORD is written to notify each subsequent commander what is happening and that a COA needs to be identified and approved. The WARNORD

²⁶ Mike McMaster. "Orders and Phasing."

should contain the approved mission statement, commander's guidance, and any information that will assist subordinate commanders with planning.²⁷ A WARNORD may also be written in multiple phases if formulating an alternate COA needs to be initiated by the higher commander.

b. Alert Order

An Alert Order formalizes the approval of a COA. Once a commander has identified which COA is to be used, the commander will let subordinate commanders know the approved COA in sufficient detail in the Alert Order.²⁸

c. Planning Order

A Planning Order (PLANORD) initiates execution planning of subordinate commanders and may precede or succeed an Alert Order dependent upon the urgency and timing of the execution. A PLANORD may be used to initiate execution planning prior to final determination and approval of a COA.²⁹

d. Deployment Order

Deployment Orders (DEPORD) are issued to commence preparations for the conduct of a military operation.³⁰ They can also be used to order the actual movement or re-deployment of forces. A DEPORD can be combined with any other order listed in this section.

e. Execute Order

The Execute Order (EXORD) initiates military operations as directed and outlined in all previous orders and is the final order given before a mission is to happen. It is possible that the EXORD is the only one written and that all information ordinarily found in the preceding orders is contained in this one order.

²⁷ MCWP 5-1.

²⁸ JP 1-02.

²⁹ JP 5-0.

³⁰ Ibid.

f. Fragmentary Order

A Fragmentary Order (FRAGO) is an abbreviated form of an OPORD, issued daily or as needed, that eliminates the need for restating information that is contained in the basic OPORD. A FRAGO may be issued in sections.³¹

g. Time Phased Force Deployment Data

Time Phases Force Deployment Data (TPFDD) is not an order per se; instead it is a database that contains information regarding apportioned forces for a combatant commander. TPFDD assigns force flow, non-unit-related cargo and personnel data, and movement data for an OPLAN. TPFDD will contain detailed information regarding anticipated deployment days, debarkation schedules, the priority of units that are scheduled to arrive in-theatre, and transportation requirements for those units.³² TPFDD is mentioned along with other orders because of the relative importance to the Logistics Officer. TPFDD is decided via input from commanders' assessment and will ultimately determine how and when a unit will deploy.

B. OPERATION ORDER STYLE & CONTENT

1. Situation, Mission, Execution, Administration & Logistics, Command & Signal (SMEAC)

An operation order (OPORD) is prepared under Joint procedures in a prescribed format during the planning process, whether it is in response to a threat in crisis action planning or it is written in the execution of an OPLAN or CONPLAN. An OPORD is the formal directive from a commander to subordinate commanders of tasks, relationships, and the situation of the units involved for the purpose of effecting the coordinated execution of an operation.³³

An OPLAN and an OPORD have a very similar format, although the OPLAN typically encompasses a larger Force and has a broader scope than the OPORD. An OPORD is written for each subsequent, subordinate commander in the chain of command

³¹ JP 1-02.

³² Ibid.

³³ Ibid.

and will consist of greater and greater detail as the orders flow downward. A Logistics Officer is expected to know and understand the explicit and implied tasks in an OPORD and, dependant upon the echelon, know how to write an OPORD for others to follow. The key objectives of an OPORD³⁴ are intended to:

- Direct and coordinate actions
- Develop a shared situational awareness
- Generate expectations about how actions will evolve and how they will affect the desired outcome
- Support the mission or exercise initiative and objective
- Shape the thinking of planners and operators alike

These objectives must be written in such a way that they are clear, concise, to the point, timely, authoritative and complete.³⁵ The Logistics Handbook acknowledges that a plan will take as long to create as the planners and drafters of the plan have been given before its anticipated execution. If an organization has only a day before movement is expected, then the plan will take only take a day to write. If the same organization has been given an unspecified timeline, then the plan will be worked, re-worked, and manipulated for the same unspecified amount of time. A drawn-out process can be counter-productive and confusing to those who are expected to carry out the plan. It is essential that an OPORD, regardless of the level to which it is written, clearly identify the following:³⁶

- Commander's intent – will be contained in the OPORD or fragmentary order (FRAGO) of the higher headquarters or commander
- Purpose of the operation – this should be spelled out in the commander's intent or derived from a higher commander's intent, assigned missions or tasks

³⁴ MCDP 5

³⁵ FM 3-101-1, Appendix A

³⁶ MCDP 5

- Specified tasks – specifically assigned to a unit by higher headquarters or commander, found primarily in the execution paragraph, but may be located elsewhere in the order
- Implied tasks – these are missions or tasks that are inherent to a unit and must be accomplished to execute specified tasks, these may not be specifically stated in the order, but rather emerge from analysis of the orders of the higher headquarters or commander
- Essential tasks – specified or implied tasks that define mission success will be stated, if a task must be successfully completed for the commander to accomplish the purpose of the operation, then it is considered to be essential

The basic OPORD and its associated appendices are written in a 5-paragraph format that clearly delineates and identifies the responsibilities of the subordinate commanders and subordinate command staffs. The acronym “SMEAC” is broken down in sections to provide separation and easily identifiable tasks, associations, and analyzes the “who, what, where, when, why, and how” of a mission.³⁷ Each supporting annex in an OPORD has a similar structure, each one outlining information specific to the title and intent of the annex. The next section includes all of the annexes, appendices, tabs, and exhibits that will likely appear in a complete OPORD. Any of the aforementioned may be omitted if the operation does not have an applicable mission.

Situation. The opening section outlines the overall posture of politico-military affairs, friendly and enemy forces, the battlespace, assumptions and other considerations made by the commander.

Mission. The commander’s mission statement will be concise and assert the tasks and purpose of the operation.

Execution. Execution includes a commander’s intent and personal expression of the purpose of the operation. This section will also include the concepts of; operations, maneuver, fires, and support. Tasks are listed here, but as noted earlier in this text, they

³⁷ MCWP 5-1.

may be located elsewhere as well. A commander’s critical information requirements and coordinating instructions are also contained in “Execution.”

A **Administration & Logistics.** Administration and Logistics includes information that will directly affect friendly forces.

C **Command & Signal.** Command and Signal outlines senior, subordinate, and adjacent relationships. This section also provides instructions or restrictions in the use of all communication systems.

2. Basic Order & Annex Table of Contents

BASIC ORDER

- I. Situation
- II. Mission
- III. Execution
- IV. Administration & Logistics
- V. Command & Signal

Annex A	Task Organization
Appendix A-1	Time-Phased Force Deployment List
Appendix A-2	Shortfall Identification
Appendix A-3	Force Module Identification
Appendix A-4	Deterrent Options
Appendix A-5	Reserve Component Requirements Summary
Annex B	Intelligence
Appendix B-1	Priority Intelligence Requirements
Appendix B-2	Signals Intelligence
Tab B-2-A	Communications Intelligence Collection Requirements
Tab B-2-B	Operational Electronic Intelligence Collection Requirements
Appendix B-3	Counterintelligence Operations
Tab B-3-A	Counterintelligence Estimate

Tab B-3-B	Counterintelligence List of Targets
Tab B-3-C	Countersigns, Challenges and Passwords
Appendix B-4	Targeting Intelligence
Tab B-4-A	Target List (Conventional)
Appendix B-5	Human-Resource Intelligence (HUMINT)
Tab B-5-A	HUMINT Operations Cell Operations
Tab B-5-B	Enemy Prisoner of War (EPW)/Civilian Detainees
Appendix B-6	Intelligence Support to Command and Control Warfare
Appendix B-7	Imagery Intelligence
Appendix B-8	Measurement and Signature Intelligence
Appendix B-9	Captured Enemy Equipment
Tab B-9-A	Specific Prioritized Intelligence Collection Requirements
Tab B-9-B	Equipment Releasable for Operational Purposes
Appendix B-10	National Intelligence Support Team
Appendix B-11	Intelligence Estimate
Appendix B-12	Intelligence Products
Appendix B-13	Intelligence Collection Plan
Tab B-13-A	Signals Intelligence Employment Plan
Tab B-13-B	Counterintelligence/HUMINT Employment Plan
Appendix B-14	Reconnaissance and Surveillance Plan
Tab B-14-A	Ground Reconnaissance and Surveillance Plan
Tab B-14-B	Sensor surveillance Plan
Exhibit B-14-B-1	Sensor Implant Plan
Exhibit B-14-B-2	Sensor Employment Plan
Exhibit B-14-B-3	Sensor Monitoring and Dissemination Plan
Exhibit B-14-B-4	Sensor Resources
Appendix B-15	Geographic Intelligence
Appendix B-16	Intelligence Operations
Appendix B-17	Support to Survival, Evasion, Resistance, and Escape

Annex C	Operations
Appendix C-1	Nuclear Operations
Appendix C-2	Chemical, Biological, and Radiological (CBR) Defense Operations
Tab C-2-A	CBR 1 Report Format
Tab C-2-B	CBR 2 Report Format
Tab C-2-C	CBR 3 Report Format
Tab C-2-D	CBR 4 Report Format
Tab C-2-E	CBR 5 Report Format
Tab C-2-F	CBR 6 Report Format
Tab C-2-G	CBR 7 Report Format
Tab C-2-H	Chemical Downwind Message Format
Appendix C-3	Information Operations/Command and Control Warfare
Tab C-3-A	Military Deception
Exhibit C-3-A-1	Task Organization
Exhibit C-3-A-2	Intelligence
Exhibit C-3-A-3	Operations
Exhibit C-3-A-4	Administration and Logistics
Exhibit C-3-A-5	Command Relationships
Exhibit C-3-A-6	Execution Schedule
Exhibit C-3-A-7	Distribution
Tab C-3-B	Electronic Warfare
Tab C-3-C	Operations Security
Tab C-3-D	Psychological Operations
Tab C-3-E	Physical Destruction
Tab C-3-F	Computer Network Attack
Tab C-3-G	Defensive Intelligence Operations
Appendix C-4	Special Operations
Appendix C-5	Evasion and Recovery Operations
Appendix C-6	Rules of Engagement
Appendix C-7	Reconnaissance

Appendix C-8	Air Base Operability
Appendix C-9	Combat Camera (COMCAM)
Tab C-9-A	COMCAM Customer Support Requirements
Appendix C-10	Non-combatant Evacuation Operations (NEO)
Appendix C-11	Escape and Evasion Operations
Appendix C-12	Counter-attack
Appendix C-13	Explosive Ordnance Disposal (EOD)
Appendix C-14	Amphibious Operations
Tab C-14-A	Advance Force Operations
Tab C-14-B	Embarkation Plan
Tab C-14-C	Landing Plan
Exhibit C-14-C-1	Landing Diagram
Exhibit C-14-C-2	Serial Assignment Table
Exhibit C-14-C-3	Landing Craft and Amphibious Vehicle Assignment Table
Exhibit C-14-C-4	Assault Table
Exhibit C-14-C-5	Landing Sequence Table
Exhibit C-14-C-6	Amphibious Vehicle Availability Table
Exhibit C-14-C-7	Amphibious Assault Vehicle (AAV) Employment Plan
Exhibit C-14-C-8	Helicopter Availability Table
Exhibit C-14-C-9	Helicopter Employment and Assault Landing Table
Exhibit C-14-C-10	Helicopter Wave and Serial Assignment Table
Exhibit C-14-C-11	Helicopter Landing Diagram
Tab C-14-D	Rehearsal Plan
Tab C-14-E	Combat Service Support (CSS) Control Agencies
Appendix C-15	Force Protection
Tab C-15-A	Combating Terrorism
Tab C-15-B	Physical Security
Tab C-15-C	Base Defense

Appendix C-16	Rear Area Operations
Appendix C-17	Aviation Operations (omitted when Annex W is used)
Appendix C-18	Operations Overlay
Appendix C-19	Fire Support
Tab C-19-A	Air Fire Plan
Exhibit C-19-A-1	Pre-planned Air Support
Exhibit C-19-A-2	Air Targets
Exhibit C-19-A-3	Air Target Overlay
Tab C-19-B	Artillery Fire Plan
Exhibit C-19-B-1	Artillery Target List
Exhibit C-19-B-2	Artillery Synchronization Matrix
Exhibit C-19-B-3	Target Overlay
Exhibit C-19-B-4	Schedules of Fire
Exhibit C-19-B-5	Observation/Target Acquisition Plan
Attachment C-19-B-5-A	Consolidated Visibility Diagram
Attachment C-19-B-5-B	Consolidated Capabilities Overlay
Attachment C-19-B-5-C	Radar Deployment Order
Exhibit C-19-B-6	Survey/Metro Plan
Tab C-19-C	Naval Surface Fire Support (NSFS) Plan
Tab C-19-D	Chemical Fire Plan
Tab C-19-E	Targeting
Tab C-19-F	Fire Support Coordination Plan
Tab C-19-G	Marine Corps Fire Surface Support (MCFSS) Plan
Appendix C-20	Counter-mechanized Plan
Appendix C-21	Breaching Plan
Appendix C-22	Obstacle Plan
Annex D	Logistics/Combat Service Support (CSS)
Appendix D-1	Petroleum, Oils, and Lubricants (POL) Supply
Tab D-1-A	Estimate of POL Support Requirements
Appendix D-2	Mortuary Affairs

Appendix D-3	Sustainability Analysis
Appendix D-4	Mobility and Transportation
Tab D-4-A	En Route Support Requirements
Exhibit D-4-A-1	En Route Support Requirements: Air
Exhibit D-4-A-2	En Route Support Requirements: Sea
Tab D-4-B	Reception, Staging, Onward-movement and Integration (RSO&I)
Appendix D-5	Civil Engineering Support Plan
Tab D-5-A	Suggested Construction Standards
Appendix D-6	Non-nuclear Ammunition
Tab D-6-A	Munitions Matrix
Appendix D-7	Supply
Appendix D-8	Services
Appendix D-9	Health Services
Appendix D-10	Aviation Logistic Support
Tab D-10-A	Aircraft Maintenance Provisions for Aviation Logistics Support
Tab D-10-B	Aviation Supply Provisions for Aviation Logistic Support
Tab D-10-C	Aviation Ordnance Provisions for Aviation Logistic Support
Tab D-10-D	Automated Data Processing Provisions for Aviation Logistic Support
Appendix D-11	External Support
Appendix D-12	Maintenance
Appendix D-13	General Engineering
Appendix D-14	Contingency Contracting/Host-Nation Support Plan
Annex E	Personnel
Appendix E-1	Enemy Prisoners of War/Civilian Internees and other Detained Persons
Appendix E-2	Processing of Formerly Captured, Missing, or Detained U.S. Personnel
Appendix E-3	Finance and Disbursing
Appendix E-4	Legal

Appendix E-5	Military Postal Service
Tab E-5-A	Aerial Mail Terminals
Tab E-5-B	Military Post Offices
Appendix E-6	Chaplain Activities
Tab E-6-A	Inter-service Chaplain (ICS) Support
Exhibit E-6-A-1	List of ICS Agreements
Exhibit E-6-A-2	ICS Reliability
Exhibit E-6-A-3	Presumed ICS
Tab E-6-B	Host-Nation Religious Support (HNRS)
Exhibit E-6-B-1	List of HNRS Agreements
Exhibit E-6-B-2	HNRS Reliability
Exhibit E-6-B-3	Presumed HNRS
Tab E-6-C	Commander-Staff Chaplain Relationships
Annex F	Public Affairs
Appendix F-1	Personnel Requirements for Joint Information Bureaus (JIB) and Sub-JIB
Appendix F-2	Equipment and Support Requirements for JIB and Sub-JIB
Appendix F-3	General Ground Rules for the Media
Appendix F-4	Department of Defense National Media Pool
Annex G	Civil Affairs
Appendix G-1	Information Requirements
Appendix G-2	Protected Target Guidance
Appendix G-3	Civil-Military Operations Center (CMOC) Operations
Appendix G-4	Transition Matrix
Appendix G-5	Forward Error Correction (FEC) Operations
Annex H	Meteorological and Oceanographic (METOC) Operations
Appendix H-1	Astronomical and Climatological Data
Appendix H-2	Marine Air-Ground Task Force (MAGTF) Standard Tactical METOC Support Plan
Tab H-2-A	Weather Facsimile (WEAX)

Tab H-2-B	Tactical Atmospheric Summary
Tab H-2-C	Strike Forecast
Tab H-2-D	Assault Forecast
Tab H-2-E	Amphibious Objective Area Forecast
Annex J	Command Relationships
Appendix J-1	Command Relationships Diagram
Annex K	Communication Information Systems
Appendix K-1	Communications and Information Systems Security
Appendix K-2	Command and Control (C2) Protection
Appendix K-3	Communications and Information Systems Planning
Appendix K-4	Radio Circuit Plan
Appendix K-5	Call Signs and Routing Indicators
Appendix K-6	Wire and Multi-channel Radio Plan
Appendix K-7	Data Communications Network Plan
Appendix K-8	Visual and Sound Communications
Appendix K-9	Communications Control
Appendix K-10	Frequency Management
Appendix K-11	Power Requirements
Appendix K-12	Command Post (CP) Displacement Communications
Appendix K-13	Tactical Satellite Communications (SATCOM)
Tab K-13-A	UHF SATCOM Network List
Tab K-13-B	SHF SATCOM Network List
Tab K-13-C	EHF SATCOM Network List
Appendix K-14	Communications Restoration
Appendix K-15	Special Maintenance Procedures
Appendix K-16	Messenger Service
Appendix K-17	Communications Center
Appendix K-18	Emergency Action
Appendix K-19	Communications for Linkup Operations
Appendix K-20	Safety
Appendix K-21	NEO Communications

Appendix K-22	Integrated Tactical/Strategic Digital Networking (ITSDN)/Defense Information System Network (DISN)/Deployment Cycle Support (DCS)
Appendix K-23	Task Organization/Communications Guard Shifts
Appendix K-24	Emergency Action Communications
Appendix K-25	Critical Incident Stress (CIS) Support for Embarked Units
Appendix K-26	Radio Battalion (RADBN)/Special Security Office (SSO) Communications Support
Appendix K-27	Special Climatic/Geographic Considerations
Appendix K-28	Joint Service Communications Coordination
Appendix K-29	Host-Nation Communications
Appendix K-30	Global Communications
Appendix K-31	Communications Support for Intelligence
Appendix K-32	Reports
Appendix K-33	Compositing
Appendix K-34	Internet Protocol (IP) Address Assignments
Appendix K-35	CIS Support for Information Management
Annex L	Environmental Considerations
Appendix L-1	Environmental Assessments
Appendix L-2	Environmental Assessment Exemptions
Annex M	Geospatial Information and Services
Appendix M-1	Geospatial Information and Services Requirements List
Appendix M-2	Geospatial Information and Services Transportation Requirements
Appendix M-3	Geospatial Information and Services Reports
Annex N	Space Operations
Annex P	Host-Nation Support (HNS)
Appendix P-1	List of HNS Agreements
Appendix P-2	HNS Reliability
Appendix P-3	Presumed HNS
Annex Q	Medical Services
Appendix Q-1	Joint Medical Regulating System

Appendix Q-2	Joint Blood Program
Appendix Q-3	Hospitalization
Appendix Q-4	Patient Evacuation
Appendix Q-5	Returns to Duty
Appendix Q-6	Medical Logistics (Class 8A) System
Appendix Q-7	Preventive Medicine
Appendix Q-8	Medical Command, Control and Communications
Appendix Q-9	Host-Nation Medical Support
Appendix Q-10	Medical Sustainability Assessment
Appendix Q-11	Medical Intelligence Support to Military Operations
Tab Q-11-A	Disease Threat by Geographic Area and Country
Appendix Q-12	Veterinary Medicine
Appendix Q-13	Medical Planning Responsibilities and Task Identifications
Annex S	Special Technical Operations
Annex U	Information Management (IM)
Appendix U-1	Commander's Critical Information Requirements (CCIR) Management
Appendix U-2	Information Needs
Appendix U-3	Duties and Responsibilities for Personnel Supporting Key IM Functions
Appendix U-4	Procedures
Tab U-4-A	Internet/Intranet Management
Tab U-4-B	Reports Matrix
Tab U-4-C	Daily Battle Rhythm
Tab U-4-D	Requests For Information (RFI) Management
Exhibit U-4-D-1	RFI Flow Diagram
Tab U-4-E	Track Management
Annex W	Aviation Operations
Appendix W-1	Air Defense/Anti-air Warfare (AAW)
Tab W-1-A	Detailed Concept of Operations (CONOPS)
Tab W-1-B	Sectors of Responsibility and Locations of AAW Agencies Overlay

Tab W-1-C	Sector Scramble Procedures
Tab W-1-D	Air Defense Warning Procedures
Tab W-1-E	Anti-aircraft Missiles and Aircraft Coordination Procedures
Tab W-1-F	Combat Air Patrol (CAP)
Tab W-1-G	Anti-aircraft Missiles Instructions
Tab W-1-H	Airborne Early Warning Instructions
Tab W-1-I	Data Link/Manual CrossTell Procedures
Tab W-1-J	Offensive AAW
Tab W-1-K	Passive Air Defense
Tab W-1-L	AAW Reports and Codes
Appendix W-2	Offensive Air Support
Tab W-2-A	Air Control Procedures
Tab W-2-B	Forward Air Controller (Airborne) Procedures
Tab W-2-C	Battle Damage Assessment Reporting Procedures
Tab W-2-D	Target Marking for Air Attack
Tab W-2-E	General Instructions and Safety Procedures
Tab W-2-F	Air Interdiction and Armed Reconnaissance
Appendix W-3	Assault Support
Tab W-3-A	Helicopter Landing Zones (LZ) Overlay
Tab W-3-B	Helicopter Control and Procedures
Tab W-3-C	Assault Support Request Form
Tab W-3-D	Helicopter Escort Procedures
Tab W-3-E	Counter-mechanized Procedures
Tab W-3-F	Helicopter Availability Table
Tab W-3-G	Helicopter Wave and Serial Assignment Table
Tab W-3-H	Helicopter Employment and Assault Landing Table
Tab W-3-I	Helicopter Landing Diagram
Appendix W-4	Reconnaissance and Surveillance Plan
Tab W-4-A	Joint Tactical Aerial Reconnaissance/Surveillance Request Form
Tab W-4-B	Air Observation Support Request Form

Tab W-4-C	Joint Tactical Electronic Warfare Request Form
Tab W-4-D	Air Reconnaissance
Tab W-4-E	Supplementary Air Operations
Appendix W-5	Supplementary Air Operations
Appendix W-6	Aircraft Armament
Appendix W-7	Air Control
Appendix W-8	Air Communications
Tab W-8-A	Call Sign and Frequency Assignments
Tab W-8-B	Lost Communications Procedures
Appendix W-9	Air Movement Plan/Flight Ferry
Appendix W-10	Aircraft Schedules
Appendix W-11	Air Tasking
Tab W-11-A	Air Tasking Process
Tab W-11-B	Air Tasking Order (ATO) Format
Annex X	Execution list
Annex Z	Distribution

3. Basic Order Template³⁸

CLASSIFICATION

Copy no. ____ of ____ copies

OFFICIAL DESIGNATION OF COMMAND

PLACE OF ISSUE

Date/Time Group

Message Reference Number

OPERATION ORDER (Number) (Operation CODEWORD) (U)

TITLE (U)

REFERENCES: List any maps, charts, standing operating procedures or other documents essential to understanding the OPORD.

(U) TIME ZONE: Enter if area of operations (AO) is different from the place of the OPORD issue.

³⁸ Adapted from MCWP 5-1.

(U) TASK ORGANIZATION: (Refer to Annex A)

1. (U) Situation

a. (U) General. Describe the general political-military environment that would establish the probable preconditions for execution of the plan. If applicable, state U.S. policy goals and the estimated goals of other parties and outline political decisions needed from other countries to achieve U.S. policy goals and conduct effective U.S. military operations to attain U.S. military missions. Specific details are found in Annex B (Intelligence).

b. (U) Battlespace

(1) (U) Joint AO or Higher Commander's AO. Describe the higher commander AO's. A map may also be included as an attachment.

(2) (U) Area of Interest. Describe the commander's area of interest covered by the basic OPORD or CONPLAN. This description should address all air, ground, and sea areas that directly affect the operation. A map may also be included as an attachment.

(3) (U) Commander's AO. Describe the specific area covered by the operation. A map may also be included as an attachment.

c. (U) Enemy Forces. Identify the opposing forces expected on execution, i.e., enemy location, disposition, etc., and appraise the enemy's general capabilities to defend, reinforce, attack, withdraw, or delay. Limit this information to what is vital for the entire command or what is likely to affect mission accomplishment. See Annex B (Intelligence) for details. Address known or potential terrorist threats. When applicable, identify the enemy's operational and tactical center(s) of gravity.

d. (U) Friendly Forces

(1) (U) This paragraph provides information on non-organic forces having a bearing on the operation. The information is presented in the following order:

(a) (U) Higher Commander. State the mission statement and commander's intent of the higher commander.

(b) (U) Adjacent Commander. State the mission statement or relevant tasks of adjacent commanders.

(c) (U) Supporting Commander. State the command relationship with the supporting commanders, specifically; operational control, tactical control, tactical missions, general support, and direct support, or relevant tasks of supporting commanders.

(2) (U) Identify applicable friendly centers of gravity that require support and protection for successful mission accomplishment.

(3) (U) If applicable, list the tasks of government and non-governmental departments, agencies, and organizations associated with the operation.

e. (U) Attachments and Detachments. List non-organic units attached to or units detached from the issuing headquarters. If no units are attached or detached, state “None.”

f. (U) Assumptions. List all assumptions on which the plan is based.

g. (U) Legal Considerations. List those significant legal considerations on which the plan is based; Status of Forces Agreements, Law of Land Warfare, Law of Armed Conflict, etc.

2. (U) Mission. Write a concise statement of the tasks and purpose of the operation. State the “who, what, when, where, why,” and as much of the “how” as necessary to ensure command, control, and coordination. The “who, what, when, and where” are derived from the essential tasks. The “why” is derived from the purpose of the operation.

3. (U) Execution

a. (U) Commander’s Intent. Commander’s intent is the commander’s personal expression of the purpose of the operation and reflects the intent of the higher commander. It must be clear, concise, and easily understood. It may also include how the commander envisions achieving a decision as well as the end-state or conditions, that when satisfied, accomplish the purpose.

b. (U) Concept of Operations (CONOPS). Write a description of how the operation will be conducted to accomplish the mission. It includes a narrative of the actions to be taken and a generic organization for combat; main and supporting effort, reserve, etc. CONOPS is the course of action approved by the commander during planning. It may be summarized here if a detailed CONOPS is contained in Annex C (Operations). CONOPS provides a basis for supporting concepts such as:

(1) (U) Concept of Maneuver. See Annex C (Operations) and Annex W (Aviation Operations [if applicable]) for a detailed description.

(2) (U) Concept of Fires. See Annex C (Operations) and Annex W (Aviation Operations [if applicable]) for a detailed description.

(3) (U) Concept of Support. See Annex D (Logistics/Combat Service Support) for a detailed description.

(4) (U) Other Concepts as Required. See appropriate annex for a detailed description.

c. (U) Tasks

(1) (U) List the tasks assigned to each subordinate commander in separate, numbered subparagraphs. Tasks are listed in order of priority or accomplishment. Tasks may be listed by operational phase. Designation of main effort or supporting effort is noted in the tasking order.

(2) (U) Actions may so critical that the commander will assign them as missions. These should be assigned as task and purpose, “the following mission is in order to accomplish. . .”, while other actions are assigned simply as tasks because the purpose is generally understood. The commander assigns subordinate commanders tasks he deems necessary to fulfill his CONOPS.

(3) (U) Unit or element task assignments are listed in the following order:

(a) (U) Offensive Operations: ground combat units or elements; infantry, followed by artillery and combat support units numerically or alphabetically, aviation

combat units or elements, aircraft units, combat support, combat service support, and finally combat service support units or elements.

(b) (U) Defensive Operations: units or elements closest to the enemy are listed first, ground and aviation combat units in the forward defense area are then listed in numerical order, and other units are then listed alphabetically.

(4) (U) Each task assignment may begin with the assets, attached or in support, available to the unit or element.

d. (U) Reserve. List the tasks assigned to the reserve force.³⁹ List all units or elements planned to be in reserve when the order is in effect. If the unit or element will be the reserve in the future, the current assigned tasks will be listed in paragraph 3c. If a unit or element in reserve is given a future mission or ordered to prepare plans for possible reserve missions, it is included in this subparagraph.

e. (U) Commander's Critical Information Requirements. A commander's critical information requirements identify information on friendly and enemy activities and the battlespace that the commander deems as critical for; maintaining situational awareness, planning future activities, and assisting in timely and informed decision making. They help the commander tailor the command and control organization and are central to effective information management, which directs the processing, flow, and use of information throughout the commander's forces.

f. (U) Coordinating Instructions. List the instructions applicable to two or more elements of the command if it is necessary for proper coordination of the operation, but the instructions are not appropriate for inclusion in a particular annex. Coordinating instructions should establish the conditions for execution and provide information about the timing of execution and deployments.

³⁹ This is not a reserve force in the traditional sense, i.e. the Naval Reserves, but rather a combat capable cadre or element withheld from the first order of battle and readied for later tasks.

4. (U) Administration and Logistics

a. (U) Personnel. Refer to Annex E (Personnel) in preparing this paragraph. Identify detailed planning requirements and subordinate tasking. Assign tasks for establishing and operating personnel facilities, managing accurate and timely personnel accountability, strength reporting, and making provisions for staffing. Discuss the administrative management of participating personnel, the reconstitution of forces, command replacement and rotation policies, and required individual augmentation to command headquarters and other operational requirements.

b. (U) Logistics. In preparing a basic OPORD, refer to Annex D (Logistics/Combat Service Support). Logistic phases are normally concurrent with operational phases. This subparagraph should address sustainment priorities and resources, base development and other civil engineering requirements, host-nation support, and inter-service responsibilities. Identify the priority and movement of major logistic items for each option and phase of the concept. Identify strategic and theater ports for resupply. Outline transportation policies, guidance, and procedures for all options. Identify logistic and transportation assumptions and include them with other planning assumptions in subparagraph 1.f. Identify detailed planning requirements and subordinate tasking.

c. (U) Public Affairs. Include appropriate information in this subparagraph or refer to Annex F (Public Affairs).

d. (U) Civil Affairs. Include appropriate information in this subparagraph or refer to Annex G (Civil Affairs).

e. (U) Meteorological and Oceanographic Services. Include appropriate information in this subparagraph or refer to Annex H (Meteorological and Oceanographic Operations).

f. (U) Geospatial Information and Services. Include appropriate information in this subparagraph or refer to Annex M (Geospatial Information and Services).

g. (U) Medical Services. In preparing the basic OPORD, refer to Annex Q (Medical Services). Identify planning requirements and subordinate tasking for hospitalization and evacuation. Address critical medical supplies and resources. Refer to wartime host-nation support agreements or provisions to support in Annex P (Host-Nation Support).

5. (U) Command and Signal

a. (U) Command Relationships. Include appropriate information in this subparagraph or refer to Annex J (Command Relationships). Indicate any changes to major commands, relationships with supporting, supported, adjacent, subordinate, or higher commands, and commands that expect to in-chop or out-chop and the time of the expected shift. Identify all existing memorandums of understanding and those that require development.

b. (U) Command Posts and Headquarters. The command post is the headquarters echelon where the commander is located. List the designations and locations of the issuing commander's headquarters echelons and appropriate senior, adjacent, and subordinate commanders' headquarters echelons. When headquarters are to be displaced, indicate the location and time of opening of the new headquarters and closing of the old headquarters.

c. (U) Succession to Command. Designate the succession of command for the operation.

d. (U) Signal. Include appropriate information in this subparagraph or refer to Annex K (Combat Information Systems). Provide instructions or restrictions about radio frequency restrictions, pyrotechnic signals, the use of lasers, etc. Include a general statement concerning the scope of communications and information systems and procedures required to support the operation. Highlight any communications and information systems or procedures requiring special emphasis.

ACKNOWLEDGE RECEIPT

Name

Rank and Service

Title

OPORD ANNEXES:

A – Task Organization

B – Intelligence

C – Operations

D – Logistics/Combat Service Support

E – Personnel

F – Public Affairs

G – Civil Affairs

H – Meteorological and Oceanographic Operations

J – Command Relationships

K – Combat Information Systems

L – Environmental Considerations

M – Geospatial Information and Services

N – Space Operations

P – Host-Nation Support

Q – Medical Services

S – Special Technical Operations

U – Information Management

W – Aviation Operations

X – Execution Checklist

Z – Distribution

OFFICIAL:

/s/

Name

Rank and Service

Title

4. Annex A (Task Organization)

ANNEX A OPERATION ORDER (Number) (Operation CODEWORD) (U) TASK ORGANIZATION (U)

(U) REFERENCES: Cite references necessary for a complete understanding of this annex.

ORGANIZATION

Issuing Headquarters. The first entry is the organization of the issuing headquarters.

Subordinate Unit or Task Grouping. Units or task groupings with no assigned mission and which are not assigned to any other grouping are indented under issuing headquarters.

Subordinate Unit or Task Grouping. Subordinate units or task groupings with assigned missions, and which are not assigned to any other grouping, are indented under issuing headquarters.

Subordinate Unit or Task Grouping. Organic and attached units or task groupings are indented under the subordinate unit or task grouping.

Units or task groupings that are not attached but will provide support are listed under the supported unit or task grouping. The type of support, i.e., general support, direct support, is shown in parentheses.

COMMANDER

Indicate names of commanders of the parent organization and principal units, including supported, supporting, and adjacent commanders.

Reserve Unit or Task Grouping. Units or task groupings in reserve are listed last. If a unit or task grouping will be in reserve in the future it is listed under reserve, as well as in its normal sequence.

APPENDICES:

1 – Time-Phased Force and Deployment List

2 – Shortfall Identification

3 – Force Module Identification (Used in conjunction with Marine Corps operations, normally at the component or MAGTF level.)

4 – Deterrent Options (Not used in Marine Corps orders. Included to conform to CJCSM 3122.03.)

5 – Reserve Component Requirements Summary

5. Annex D (Logistics/Combat Service Support)

ANNEX D TO OPERATION ORDER (Number) (Operation CODEWORD) (U)
LOGISTICS/COMBAT SERVICE SUPPORT (U)

(U) REFERENCES: Cite references necessary for a complete understanding of this annex.

1. (U) Situation

a. (U) Enemy Forces. Refer to Annex B (Intelligence). Provide available information on enemy actions or intent to conduct actions to disrupt or degrade envisioned friendly logistic and combat service support operations. Include information on enemy capabilities or assets that can augment friendly logistic and combat service support operations.

b. (U) Friendly Forces. List supporting logistic or combat service support organizations not subordinate to the force and the specific missions and tasks assigned to each.

c. (U) Infrastructure. Refer to Annex B (Intelligence). Provide information on existing infrastructure, such as ports, factories, fuel and water sources, and lines of communications (LOC) that can be used to support friendly logistic and combat service support operations.

d. (U) Attachments and Detachments. Refer to Annex A (Task Organization). List other service and nation logistic and combat service support units attached to the

force. List all Navy and Marine Corps logistic and combat service support units detached to support other friendly forces.

e. (U) Assumptions. State realistic assumptions and consider the effect of current operations on logistic capabilities.

f. (U) Resource Availability. Identify significant competing demands for logistic resources where expected requirements may exceed resources. Include recommended solutions within resource levels available for planning, if any, and reasonably assured host-nation support.

g. (U) Planning Factors. Refer to and use approved planning factors and formulas, except when experience or local conditions dictate otherwise. When deviating from planning factors, identify the factors and the reason.

2. (U) Mission. State in a clear, concise manner the mission of the logistics and combat service support forces and the logistic objectives that support accomplishment of the command's purpose and tasks.

3. (U) Execution

a. (U) Concept of Logistics and Combat Service Support. State the concept for logistics and combat service support operations necessary to implement the order or plan. Describe how the logistics and combat service support assets will be organized and positioned to execute the mission. The concept may include planned employment of other services, agencies, and nation's logistics and combat service support forces, host-nation support logistic capabilities, or operation of the LOC.

b. (U) Tasks

(1) (U) Assign logistics and combat service support responsibilities to subordinate logistics organizations.

(2) (U) Identify and assign responsibility for logistics and combat service support required from other commands, services, or nations.

(3) (U) Identify and assign responsibility for logistics and combat service support required for forces assigned or attached from other commands, services, or nations.

(4) (U) Identify and assign responsibility for logistics and combat service support required for Navy or Marine Corps forces assigned or attached to other commands, services, or nations.

(5) (U) Assign responsibilities to support joint boards and committees, such as transportation and procurement, and other services or nations providing services.

4. (U) Administration and Logistics

a. (U) Logistics and Combat Service Support

(1) (U) Supply. Refer to Appendix 7 (Supply) to Annex D (Logistics/Combat Service Support). Summarize the following facets of the supply operation in coordination with supporting commanders and service component commanders if the functions are different from standard planning factors. Detailed discussions shall be included in the appendices and listings of supply depots, terminals, and LOC as tabs or in the appropriate appendices.

(a) (U) Distribution and Allocation

i. (U) Purpose, location, and projected displacement of main and alternate supply depots or points and supporting terminals and ports to be used or considered.

ii. (U) Prepositioned logistic resource allocation.

iii. (U) Existing terminals and LOC and the known or estimated throughput capability. Indicate the time-phased expansion necessary to support the plan.

(b) (U) Level of Supply

i. (U) Indicate the time-phased operating and safety levels required to support the plan.

ii. (U) Indicate the prepositioned war reserve materiel requirements to support the time-phased deployments that are pending re-supply.

iii. (U) Specify significant special arrangements required for materiel support beyond normal supply procedures.

iv. (U) Indicate anticipated shortfalls.

v. (U) Indicate common-user logistic supply support responsibilities and arrangements.

(c) (U) Salvage. Provide instructions for, and identify the logistic impact of, the collection, classification, and disposition of salvage.

(d) (U) Captured Enemy Materiel. Provide instructions for the collection, classification, and disposition of enemy materiel. See Annex B (Intelligence) for further guidance. See Appendix 10 to Annex B (Intelligence) for specific instructions for the disposition of captured enemy cryptographic equipment.

(e) (U) Local Acquisition of Supplies and Services. See Joint Pub 4-01, the current version of DOD Instruction 3020.37, and applicable local instructions that may be in place at the time of the operation.

i. (U) Identify acquisition of goods and services in the following categories:

a) (U) The general categories of materiel and services that is available and contemplated as a supplement to regular sources.

b) (U) Sources that may be used for emergency acquisition.

ii. (U) Make a statement concerning the dependability of the local acquisition or labor source in each of the above categories and the joint or service element that will obtain or manage these resources.

iii. (U) State that all essential contractor services, to include new and existing contracts, have been reviewed to determine which services will be essential to OPORD execution. Make a statement concerning the existence of CONPLANS to ensure the continuation of these essential services.

(f) (U) Petroleum, Oils, and Lubricants. Refer to Appendix 1 (Petroleum, Oils, and Lubricants Supply) to Annex D (Logistics/Combat Service Support).

(2) (U) External Support. Refer to Appendix 11 (External Support) to Annex D (Logistics/Combat Service Support). Provide the required planning information including type and quantity of support and instructions where inter-service and cross-service arrangements for common supply and service support are appropriate.

(a) (U) Summarize major support arrangements that are presently in effect or that will be executed in support of the plan.

(b) (U) Include significant inter-service and cross-service support arrangements. Refer to appropriate annexes or appendices.

(c) (U) Include foreign and host-nation support.

(3) (U) Maintenance

(a) (U) General. Refer to Appendix 12 (Maintenance) to Annex D (Logistics/Combat Service Support).

(b) (U) Specific Guidance

i. (U) Include sufficient detail to determine the requirements for maintenance facilities needed to support the plan.

ii. (U) Indicate the level of maintenance to be performed and where it is to occur, including host-nation or contractor facilities, if applicable.

(4) (U) Transportation

(a) (U) General. Refer to Appendix 4 (Mobility and Transportation) to Annex D (Logistics/Combat Service Support). Provide general planning or execution guidance to subordinate and supporting organizations to facilitate transportation of the force and its sustainment. This can include movement and who has priority for usage.

(b) (U) Mobility Support Force and Movement Feasibility Analysis. Provide an estimate of the mobility support and movement feasibility of the plan. Include in the analysis any appropriate remarks affecting mobility and transportation tasks. Consider the availability of adequate lift resources for movements of personnel and equipment, airfield reception capabilities, seaport and aerial port terminal capabilities, and port throughput capabilities. Also consider any features that will adversely affect movement operations, such as the effect of deployment or employment of forces and materiel on airfield ramp space.

(5) (U) General Engineering Support Plan. Refer to Appendix 13 (General Engineering) to Annex D (Logistics/Combat Service Support). State the rationale if Appendix 5 (Civil Engineering Support Plan) to Annex D (Logistics/Combat Service Support) is not prepared. Indicate the general engineering support activities applicable to the basic OPORD and the policies for providing these services.

(6) (U) Health Services. Refer to Appendix 9 (Health Services) to Annex D (Logistics/Combat Service Support).

(7) (U) Services. Refer to Appendix 8 (Services) to Annex D (Logistics/Combat Service Support).

(8) (U) Mortuary Affairs. Refer to Appendix 2 (Mortuary Affairs) to Annex D (Logistics/Combat Service Support). Indicate the mortuary affairs activities applicable to the OPORD and policy for providing these affairs if mortuary affairs appendix is not included.

(9) (U) Ammunition. Refer to Appendix 6 (Non-nuclear Ammunition) to Annex D (Logistics/Combat Service Support). Discuss any critical ammunition issues that may affect the ability of the force to accomplish the mission if non-nuclear ammunition appendix is not included.

(10) (U) Aviation Logistic Support. Refer to Appendix 10 (Aviation Logistic Support) to Annex D (Logistics/Combat Service Support) or Annex D (Logistics/Combat Service Support) of the aviation combat element OPORD. Critical aviation logistic and combat service support issues may be discussed if they affect the ability of the force to accomplish the mission.

(11) (U) Operation Security (OPSEC) Planning Guidance for Logistics. Refer to Tab C (Operations Security [OPSEC]) to Appendix 3 (Information Operations/Command and Control Warfare) to Annex C (Operations). Provide a comprehensive OPSEC planning guidance for planning, preparing, and executing logistic and combat service support activities. At a minimum, address base, facility, installation, logistic stocks, physical, and LOC security. Provide guidance to ensure that logistic and combat service support activities promote essential secrecy for operational intentions,

capabilities that will be committed to specific missions, and current preparatory operational activities.

b. (U) Administration. Include general administrative guidance to support logistic and combat service support operations for the basic OPOD. If reports are required, specify formats for preparation, time, methods, and classification of submission.

5. (U) Command and Signal

a. (U) Command Relationships. Refer to Annex J (Command Relationships) for command relationships external to logistics units. Provide supporting and supported relationships.

b. (U) Communications and Information Systems. Refer to Annex K (Combat Information System) for detailed communications and information systems requirements. Provide a general statement of the scope and type of communications required.

APPENDICES:

1 – Petroleum, Oils, and Lubricants Supply

2 – Mortuary Affairs

3 – Sustainability Analysis

4 – Mobility and Transportation

5 – Civil Engineering Support Plan

6 – Non-nuclear Ammunition

7 – Supply

8 – Services

9 – Health Services

10 – Aviation Logistic Support (Normally provided in the aviation combat element plan or order.)

11 – External Support

12 – Maintenance

13 – General Engineering

14 – Contingency Contracting/Host-nation Support Plan

TAB A TO APPENDIX 6 TO ANNEX D TO OPERATION ORDER (Number)
(Operation CODEWORD) (U) MUNITIONS MATRIX (U)

(U) REFERENCES: Cite references necessary for a complete understanding of this tab.

1. (U) General. Critical sustainability items (CSI) are level-of-effort and threat-oriented munitions items that commanders identify as essential to successful execution of the OPORD. As a minimum, each CSI should include level-of-effort items with less than 30-days of supply on hand or located in theater storage and threat-oriented items with less than 50-percent of required assets on hand.

a. (U) Column 1 – Provide a separate report section for each Service component assigned.

b. (U) Column 2 – Provide appropriate name and identification codes or markings with substitutes for each type of munitions.

c. (U) Column 3 – Provide the total OPORD requirements.

d. (U) Column 4 – Provide a time-phased breakout of the total OPORD requirements.

e. (U) Column 5 – Provide the theater asset posture.

f. (U) Column 6 – Provide the theater capability and the percentage of required assets on hand.

g. (U) Column 7 – Provide the munitions deficiency, which is the difference between the total OPORD requirements (Column 3) and the in-theater assets (Column 5). This is the amount the logistics planners will need to source from out-of-theater assets.

h. (U) Column 8 – Provide the results of the Services sourcing process to support the time-phased requirement.

i. Column 9 – Provide the total shortfall, which is the difference between the deficiency (Column 7) and the Services' re-supply (Column 8).

j. Column 10 – Provide the aggregate capability (see Column 6).

APPENDIX B: SUPPORTING CHECKLISTS

Preparing for a deployment or any phase in an operation requires a great deal of thought and preparation. Many things run through the minds of the planning and logistics teams and the Logistics Officer as movement day nears. Checklists are a valuable tool in assisting with planning and ensuring that nothing has been overlooked or left to chance at any phase. Table (1) is a general list of items and concerns that need to be considered when making deployment preparations and how these items will be obtained either organically, through contracted support, or with host-nation support (HNS). The following checklists are comprehensive, but by no means all encompassing since no two operations or exercises are identical. These checklists are merely intended to give the Logistics Officer a starting point from which to begin preparations and will likely change the planning perspective and frame of mind. These checklists should be modified to accommodate the nature of the supported mission.

Table 1. Items for Pre-movement Consideration⁴⁰

<p>1. <u>Accommodations</u></p> <ul style="list-style-type: none"> a. billeting b. offices c. stores & warehouses d. workshops e. medical f. hardstands g. fuel h. recreation i. laundry 	<p>2. <u>Weapons & Ammunition</u></p> <ul style="list-style-type: none"> a. transportation, including aircraft b. security c. storage d. firing ranges e. training areas & facilities f. collection or delivery
<p>3. <u>Communications</u></p> <ul style="list-style-type: none"> a. local phone service, mobile & landlines b. international phone service c. security 	<p>4. <u>Fuel</u></p> <ul style="list-style-type: none"> a. aviation b. vehicles c. ships d. storage e. method of delivery f. refueling stations g. environmental standards

⁴⁰ Adapted from FM 100-8.

<p>5. <u>Finance</u></p> <ul style="list-style-type: none"> a. payment for all other categories b. consumables c. military interdepartmental purchase request (MIPR) & transfers 	<p>6. <u>Local Labor</u></p> <ul style="list-style-type: none"> a. method of hiring b. method of payment c. administration
<p>7. <u>Maintenance</u></p> <ul style="list-style-type: none"> a. accommodations b. vehicles c. ships d. equipment e. roads f. fixed and rotary-wing aircraft g. damage control h. emergency facilities for guest vehicles and equipment i. evacuation of disabled vehicles and equipment 	<p>8. <u>Movement</u></p> <ul style="list-style-type: none"> a. aerial ports; primary & alternates <ul style="list-style-type: none"> - facilities - material handling equipment (MHE) - refueling b. sea ports; primary & alternates <ul style="list-style-type: none"> - draft - bunkering - repair c. road & rail <ul style="list-style-type: none"> - personnel - equipment - security - traffic control
<p>9. <u>Medical</u></p> <ul style="list-style-type: none"> a. routine health care b. emergency facilities c. foreign national health care d. evacuation of casualties 	<p>10. <u>Rations</u></p> <ul style="list-style-type: none"> a. fresh b. meals, ready-to-eat c. other packed rations d. potable & bottled water
<p>11. <u>Supplies & Equipment</u></p> <ul style="list-style-type: none"> a. consumables b. all other than ammunition, fuel, or rations 	<p>12. <u>Translation</u></p> <ul style="list-style-type: none"> a. interpreters, language & cultural specialists b. translation of documents
<p>13. <u>Transportation Equipment</u></p> <ul style="list-style-type: none"> a. MHE b. contracted or host-nation provided c. policy on drivers and handlers 	<p>14. <u>Water</u></p> <ul style="list-style-type: none"> a. production/purification capability b. distribution c. storage d. host-nation quality standards

A. SURVEY, LIAISON, & RECONNAISSANCE PARTY

The Survey, Liaison, and Reconnaissance Party (SLRP) is a pre-deployment, pre-operational group of key personnel within a command whose mission is to provide a unit commander with the information needed for a mission analysis and to properly align the personnel and equipment package required to accomplish follow-on missions to meet the objectives of an operation or exercise. The SLRP will conduct site surveys in all potential operating areas during the deployment. The purpose of the site survey is to have eyes-on contact with sea ports, aerial ports, arrival and assembly areas (AAA), potential camp sites, base operation sites, and any other geographic site or facility that may be required to accomplish a mission. The site survey is also the appropriate time and place for SLRP to meet with host-nation, coalition, intra and inter-Service counterparts.

Key assistants or departments of a unit are included as members in the SLRP. The number of SLRP members and the representation of various departments will vary and is dependent upon the size and scope of the unit. A regimental SLRP will be much larger than that of a battalion, for example. Each assistant or department will have sufficient representation to cover all possible operating areas to accomplish a thorough site survey. Unit officers and enlisted personnel that may be included on the SLRP are; Logistics Officer, Operations Officer, Operations Chief, Intelligence Officer, Plans Officer, Medical Officer or Independent Duty Corpsman, Legal Officer, Communications Officer or Communications Chief, and any others that the unit Commanding Officer ultimately determines is needed for a mission analysis and to properly plan for the operation or exercise.

The SLRP will identify what is required to support the forces that are known to be within its area of responsibility (AOR) based upon the specified and implied tasks written into an OPLAN or an OPORD. The SLRP Logistics Officer will determine existing contracts and contracting potential, what HNS has been planned and can be counted upon, what HNS will be ad hoc and potentially at risk of delivery, and what assets will need to be organic and included in the deployment package.

B. ADVANCED PARTY

The SLRP may be followed or may be included as part of the Advanced Party (AP). The AP is an echelon that is intended to precede the Main Body or preponderance of deploying personnel and can be referred to as the advanced echelon (ADVON). The AP will consist primarily of specialists and planners whose mission is to prepare for the arrival of the Main Body. The AP may have the responsibility of initial camp construction, preparing the AAA, and ensuring that all arrangements made by the SLRP are carried through. The AP will also make adjustments and begin to fine-tune the orders and plans that were written and given prior to actual deployment. Daily situation reports (SITREP) will be sent by the AP back to the Main Body so that final modifications to the deployment personnel and equipment package can be made and the Main Body can be kept apprised of progress made by the AP. Table (2) is a thorough checklist that will encompass many facets of planning and preparation by the SLRP and AP. Not all categories or specific line items in the checklist will apply to every mission. The checklist should be reviewed at the time of deployment or each body of personnel or operational phase and modified to meet the needs of the planning process and the specific mission. The officer or senior enlisted within the cognizant department or code should take the responsibility for their respective portion of the checklist, but the Logistics Officer should ensure that all aspects have been assigned to an individual and that progress updates are maintained. The terms “taskforce” and “Marine Air-Ground Task Force (MAGTF)” are used interchangeably within the checklist as reference to the supported element, but the line item may apply to any size or functional group that is responsible for the respective task.

Table 2. Survey, Liaison, & Reconnaissance Party (SLRP)/Advanced Party (AP) Checklist

PRE-DEPLOYMENT CHECKLIST

1. PERSONNEL

The SLRP determines or identifies the following prior to deployment –

- a. Uniform/civilian dress requirements for both on and off base and when personnel are traveling under separate orders
- b. Cash requirements and method of currency exchange
- c. Customs, cultural and religious do's and don'ts
- d. Camera restrictions for all personnel
- e. Emergency leave and pay procedures
- f. Requirements for maintaining and obtaining in-country ID cards
- g. Passport/visa requirements
- h. Immunization requirements
- i. Mailing address and mail procedures
- j. Red Cross service and support
- k. Plan for general administrative support
- l. Diplomatic pouch/secure communication services available through U.S. Embassy

1.2 Public Affairs

- a. Points of contact at the embassy/consulate and host-nation
- b. Identification of operation/exercise Public Affairs Officer (PAO)
- c. U.S. and foreign interest in operation/exercise
- d. Approximate size of press corps/pool
- e. Press corps logistics requirements

- f. Host-nation press corps/media concerns
- g. USMC/USN responsibilities for host-nation requirements applicable to media
- h. Determine taskforce/MAGTF responsibility to establish a press center
- i. Press identification tags
- j. U.S. Embassy press policies
- k. U.S. Embassy/press attaché plans for involvement
- l. PAO responsibilities established
- m. Photo restrictions from host-nation for both still and video
- n. Photo processing facilities
- o. Satellite transmission facilities
- n. Communication support for the press corps
- p. Off-base billeting for press corps
- q. Procedures for obtaining the Stars and Stripes newspaper (1 per 5 service members)
- r. Hometown news release procedures
- s. Courier service availability to press corps

1.3 Legal

Staff Judge Advocate (SJA) or Legal Officer will –

- a. Obtain copies of Host-nation Support Agreements (HNSA) and contracts
- b. Review HNSA and contracts prior to signing
- c. Determine Status of Forces Agreements (SOFA)
- d. Determine U.S. privileges and immunities for operation/exercise
- e. Determine procedures to obtain custody of service members incarcerated
- f. Determine tax liabilities for personnel entering/leaving host-nation

- g. Determine duties/obligations the U.S. has regarding equipment brought into host-nation
- h. Determine financial obligation to the host-nation that the U.S. incurs through operation/exercise
 - i. Establish procedures for claims brought against the U.S. Government
 - j. Identify host-nation restrictions concerning flow of motor vehicles
 - k. Determine host-nation requirements for passport/visa for both entering and leaving
 - l. Obtain copies of all SOFA, Memorandums of Understanding (MOU), protocols, or agreements applicable
 - m. Establish procedures for the review of all contracting procedures/documents
 - n. Report legal restrictions, such as Environmental Protection Agency restrictions, that may have a potential impact on the operation/exercise
 - o. Determine host-nation requirements concerning evacuation of human remains

1.4 Intelligence

Intelligence (G/S-2), counterintelligence, or security personnel will –

- a. Determine points of contact with host-nation and U.S. security officials
- b. Determine maps, charts, geodetic and aerial photo product requirements
- c. Obtain terrain analysis of AAA
- d. Gather meteorological/astronomical data for analysis
- e. Determine location of all U.S. federal agencies in the AAA
- f. Identify local intelligence agencies available to support taskforce/MAGTF
- g. Develop a narrative summary concerning threat assessment

1.5 Operations

The taskforce/MAGTF Operations (G/S-3) will –

- a. Identify area to be used for arrival and assembly
- b. Identify operation/exercise area
- c. Identify joint/combined operational/training requirements for U.S. and allied forces
- d. Identify all range requirements
- e. Determine all special equipment/uniform requirements for operation/exercise
- f. Identify training restrictions for weapons/ammunition, and tracked vehicles
- g. Obtain all maps and photographs of AAA and operational/training areas
- h. Determine supporting/supported combatant commander (COCOM) deployment order requirements
- i. Obtain copies of OPLAN that the taskforce/MAGTF may support
- j. Determine chemical, biological, radiological (CBR) threat
- k. Determine OPORD/OPLAN requirements of the supported COCOM
- l. Determine translator/linguist requirements
- m. Obtain charts showing host-nation service members rank structure
- n. Identify procedures for local explosive ordnance disposal (EOD) support
- o. Determine environmental restrictions within AAA that may affect the operation/exercise
- p. Determine environmental considerations/concerns for troop commanders

1.6 Security

Security personnel will –

- a. Identify security requirements for the SLRP, Offload Preparation Party (OPP) and AP in the AAA

- b. Determine who will provide security in the AAA (host-nation/U.S.)
- c. Identify points of contact for security
- d. Identify security forces Rules of Engagement (ROE) to include air defense and methods to disseminate ROE to all personnel
- e. Identify host-nation security procedures within the AAA and the operation/exercise areas
- f. Determine U.S. personnel mobility within the entire area of responsibility (AOR)
- g. Determine security considerations for flag officers
- h. Determine requirements for host-nation contracted worker ID cards
- i. Identify and report primary/alternate locations for air defense units

1.7 Provost Marshal/Master at Arms

The Provost Marshal/Master at Arms representative will

- a. Develop a law enforcement concept
- b. Determine special requirements due to host-nation customs/values and merge those requirements into enforcement
- c. Determine customs procedures for arrival and departure
- d. Identify POC and location of local police, security and military agencies

1.8 Logistics

Logistics personnel are responsible for –

- a. Air transport facilities evaluation
 - 1) Air Mobility Command (AMC)/Tanker Air Lift Control Element (TALCE) requirements
 - 2) Material Handling Equipment (MHE) requirements
 - 3) Temporary passenger shelter

- 4) Cargo storage areas (indoor and outdoor)
- 5) Taxi service availability
- 6) Bus availability
- 7) Shuttle requirements
- 8) Convoy routes from arrival airfield to AAA
- 9) Ammunition transportation restrictions
- 10) Dunnage/crate reclamation procedures

b. Determining availability/requirements for environmentally controlled structures

c. Billeting information

- 1) Billeting locations
- 2) Distance from quarters to work spaces
- 3) Cost of quarters
- 4) Billeting/work space for non-military personnel
- 5) Tent camp locations

d. Determining water requirements –

- 1) Source of bottled water
- 2) Potability of local water within operation/exercise area and AAA
- 3) Water transportation
- 4) Water storage capabilities in the operation/exercise area and AAA
- 5) Water requirements for medical, messing, and personal hygiene
- 6) Availability of well water
- 7) Whether drilling for water is possible or feasible
- 8) Source/requirement for ice and dry ice

- e. Petroleum, Oils, and Lubricants (POL)
 - 1) Understand POL requirements
 - 2) Analyze costs of bringing POL from home-port to AAA vice HNS
 - 3) Determine host-nation and Defense Logistics Agency (DLA)/Defense Fuel Supply Center (DFSC) POL sources and availability to the taskforce/MAGTF
 - 4) Determine host-nation POL storage capacity
 - 5) Provide POL quality control measures
 - 6) Identify and report location for employment of Amphibious Assault Bulk Fuel System (AABFS) and determine water depth for ship-to-shore fuel transfer sites
- f. Ammunition
 - 1) Identify location of ammunition supply points (ASP)
 - 2) Determine whether host-nation and U.S. safety requirements are compatible
 - 3) Determine ammunition security requirements
 - 4) Determine explosive arc for ASP/Maritime Prepositioning Ships (MPS)
 - 5) Determine host-nation availability of explosive drivers/MHE operators
- g. Personal hygiene services
 - 1) Laundry services
 - 2) Shower facilities
- h. Transportation
 - 1) SLRP/AP transportation requirements
 - 2) Convoy routes/escort requirements (U.S. and host-nation)
 - 3) Host-nation transportation to move troops within arrival airfield and AAA
 - 4) All available information concerning main supply routes (MSR) –

- a) Speed limits
 - b) Rest stops
 - c) Refueling points
 - d) Remaining-overnight locations
 - e) Road conditions
 - f) Road limitations, constraints, and restrictions
 - g) Requirements for special permits (e.g., international licenses)
 - h) SOFA rules governing U.S. forces in case of accident
 - i) Vehicle support for flag officers and distinguished visitors (DV)
 - j) Wash down points
 - k) Passenger, vehicle, and cargo processing areas
 - l) Host-nation wrecker support
 - m) Host-nation structural fire truck support
 - n) Bus and shuttle route requirements
 - o) Source and rules concerning rental vehicles
 - p) Source and rules for use of host-nation railroads
 - q) Locations and other restrictive features of bridges/underpasses/tunnels
- i. Determine availability of support for supply systems –
- 1) Sources, procedures, and stocks available through the nearest U.S. military base
 - 2) Procedures/authority for the purchase of all classes of supply from the host-nation
 - 3) Storage areas (covered/uncovered) for use by supply personnel
 - 4) Facility capabilities to support supply functions

1.9 Comptroller

The comptroller or designated representative is responsible for the following –

- a. Contract information -
 - 1) Determining all known contracting requirements
 - 2) Establishing funding procedures
 - 3) Identifying primary agent for finances
 - 4) Determining source for contracting agent
- b. Criteria for contracts –
 - 1) Cost
 - 2) Purpose
 - 3) Contractors involved
 - 4) Contracting Officer Representative (COR) assignments
- c. Areas that may require contracts –
 - 1) POL
 - 2) Water/ice/dry ice
 - 3) Electricity (distribution and generation)
 - 4) Billeting (flag, officer, enlisted, DV, male/female)
 - 5) Industrial services (trash, laundry, portable heads/sewage disposal)
 - 6) Engineer services (prep of land, ditching, stump removal)
 - 7) Messing/dining/catering services
 - 8) Land/facility rental
 - 9) Vehicle and other equipment rental
 - 10) Vehicle maintenance support
 - 11) Wrecker support

12) Host-nation security personnel

13) Printing services (copiers/road maps)

- d. Determine anticipated costs
- e. Identify support requiring HNSA
- f. Identify support requiring other than HNSA
- g. In conjunction with higher headquarters, negotiate HNSA
- h. Establish methods for handling funds
- i. Identify agent(s) which have authority to certify availability of funds
- j. Indicate local purchase requirements
- k. Determine whether local transactions will be cash, charge, or voucher
- l. Estimate and obtain imprest funds (if authorized)
- m. Identify source and procedures for fund/currency conversion
- n. Identify contracting procedures
- o. Establish procedures for taskforce/MAGTF contracting agent to write contracts during initial deployment of the Main Body
- p. Determine host-nation reimbursement requirements

1.10 Medical

Medical personnel are responsible for the following –

a. Only a qualified: Plans, Operations, and Medical Officer; Environmental Health Officer; or Preventive Medicine Technician, will be assigned to the SLRP to evaluate capabilities of the nearest medical facilities and support services. Evaluation criteria should include, but not be limited to -

- 1) Location
- 2) Distance from AAA
- 3) Inpatient capacity

- 4) Number of host-nation physicians assigned to or on staff
 - 5) Number of nurses and ancillary personnel
 - 6) Types and numbers of medical specialties available
 - 7) Outpatient care capabilities
 - 8) X-ray capabilities, including scope and range
 - 9) Laboratory services available
 - 10) Dental facilities available
 - a) Number of dentists, hygienists and dental technicians available
 - b) Dental lab/X-ray services available, including range and scope
 - c) Number of dental surgeons available and status of equipment
 - 11) Food service facilities within the hospitals and their sources of food supplies
 - 12) Sources for water, fuel, and storage facilities including electrical power
 - 13) Methods of disposal for all types of waste including bio-hazardous waste
- b. Locate and evaluate local sources of medical supplies, to include timeline for request for delivery of supplies
 - c. Determine the number of ambulances available to include; type, condition, maintenance support required and type(s) of fuel used
 - d. Number of qualified ambulance drivers and Emergency Medical Technicians (EMT) available
 - e. Determine if Medical Evacuation (MEDEVAC) is available and location(s) of landing zones(s) (LZ) in relation to medical facilities
 - f. Identify general medical information that may affect the general health of the taskforce/MAGTF –
 - 1) Topography

- 2) Climate
 - 3) Prevalent insects
 - 4) Prevalent rodents
 - 5) Poisonous reptiles (land and water)
 - 6) Communicable diseases in the AOR, including history of disease prevalent in the area
 - 7) Domestic/wild animals prevalent, including veterinary assistance
 - 8) Special requirements
- g. Evaluate the following socio-economic features of the local population and how those features may affect the general health of the taskforce/MAGTF –
- 1) Living conditions
 - 2) Customs and religion(s)
 - 3) Addictions
- h. Determine effectiveness of procedures employed to control insects and rodents

1.11 Communications

Communications personnel will –

- a. Determine frequency requirements
- b. Determine available frequencies
- c. Identify requirements to establish a communications link between the AAA and the U.S. Embassy/Consulate
- d. Determine whether the climate of the AAA may adversely affect operations/exercise communications
- e. Determine requirements for the taskforce/MAGTF processing/message center including facility availability and HNS

- f. Determine location of closest classified material disposal facility (shredding facility)
- g. Cryptographic information –
 - 1) Cryptographic account number and mailing address
 - 2) Distribution procedures for cryptographic material
- h. Non-tactical radios available –
 - 1) Non-tactical radio systems in use
 - 2) Frequency and power/range
 - 3) Frequencies available
 - 4) Frequency/power restrictions in AAA/Area of Operations (AO)
- i. Determine accessible Department of Defense (DOD) communications agencies
- j. Defense Switched Network (DSN)/Automatic Digital Network (AUTODIN) common user military network availability –
 - 1) Availability on base
 - 2) Circuits available
 - 3) Alternate routing capability
- k. Determine communications requirements to support training areas
- l. Determine tactical communications requirements to support –
 - 1) MEDEVAC operations
 - 2) Local security within the AAA
 - 3) Host-nation/Multinational liaison parties

2. SLRP RESPONSIBILITIES IN THE ARRIVAL AND ASSEMBLY AREA

This section aids the SLRP in evaluating and preparing the AAA once the SLRP arrives in-country.

2.1 Personnel

The SLRP will determine the following –

- a. Restrictions for service members and civilians attached to the taskforce/MAGTF
- b. Local regulations for casualty control procedures with specific emphasis on processing remains of deceased personnel
- c. Recreational facilities and cultural tours available
- d. Special Services support available
- e. ATM locations for cash withdrawal and direct deposit used by personnel
- f. Verify all personnel pre-deployment checks

2.2 Public Affairs

Verify all public affairs pre-deployment checks

2.3 Legal

- a. Determine jurisdiction rules over taskforce/MAGTF personnel in the event of crimes or accident
- b. Determine necessary reports in the event U.S. personnel are detained by local authorities
- c. Verify all legal pre-deployment checks

2.4 Intelligence

- a. Conduct counterintelligence survey to assist commanders in establishing systems, procedures, and safeguards to protect military installations, personnel and organizations from espionage, sabotage, terrorism or subversion

- b. Verify all intelligence pre-deployment checks

2.5 Operations

- a. Verify all ranges for joint and special/follow-on training
- b. Finalize plans to organize and mark the AAA to include areas for the SLRP
- c. Determine drop zone requirements for possible air delivery
- d. Finalize locations and numbers of landing zones and cushion landing zones
- e. Finalize command post (CP) locations that are for use by military units participating in the operation/exercise but are not part of the taskforce/MAGTF or Maritime Prepositioning Force (MPF) operation
- f. Verify all operations pre-deployment checks

2.6 Security

- a. Establish Joint/multinational security requirements
- b. Identify/verify all off-limits areas to U.S. Forces
- c. Determine host-nation escorts for movement outside the AAA and identify the following –
 - 1) Escort coordinator
 - 2) Escort translation requirements
 - 3) Mission briefing
- d. Determine restrictions on U.S. personnel carrying weapons/ammunition outside the AAA
- e. Finalize the security plan overlay –
 - 1) Airfield
 - 2) Port/beach/anchorages
 - 3) Roads/MSR
 - 4) Billeting areas

- 5) Assembly areas
- 6) Ships/small boats
- f. Verify all security pre-deployment checks

2.7 Provost Marshal/Master at Arms

- a. Analyze effect that existing political agreements or SOFA will have on law enforcement activities
- b. Determine off-limit areas/establishments and discuss distribution limits and methods
- c. Determine security requirements for ammunition, weapons and equipment, and establish plan to implement required controls
- d. Verify all provost marshal/master at arms pre-deployment checks

2.8 Logistics

- a. Camp services, engineer services and utilities requirements –
 - 1) Survey sites
 - 2) Determine areas affected by adverse weather
 - 3) Evaluate road networks on and off-base
 - 4) Finalize requirements for construction projects and Class IV information
 - 5) Finalize requirements for water supply and mobile electric power to include source and expected dependability
 - 6) Determine latrine capability, type, location, capacity, and balance against known requirements
 - 7) Verify plan for refuse disposal, including ecology procedures
 - 8) Determine shower capabilities, availability, capacities, and locations
 - 9) Determine vehicle wash down sites
 - 10) Verify fire protection information

- 11) Finalize rules on construction projects performed by participants
- b. Verify the following –
- 1) Location of desalination plants
 - 2) Recommended locations of water purification units/water points
 - 3) Location of ice/dry ice supply points
- c. Finalize messing information to include –
- 1) Number of perspective areas
 - 2) Total number of personnel that require mess support
 - 3) Total number and frequency of hot meals vice MRE
 - 4) Existing dining facility capabilities
 - 5) Availability of local contractor support
 - 6) Availability of MRE supplements
 - 7) Refrigeration requirements
 - 8) Ration resupply cycle
 - 9) Construction support for required dining facility set-up
 - 10) Establishment of initial messing hours
 - 11) Identification of ration resupply point location
 - 12) Ration distribution system
 - 13) Ration storage capability
 - 14) Picnic supply request procedures for local/host-nation support
- d. Verify all logistics pre-deployment checks

2.9 Comptroller

- a. Finalize criteria for contracts
- b. Determine means of funding costs not anticipated

- c. Verify all comptroller pre-deployment checks

2.10 Medical

- a. Verify general state of repair for all facilities and ancillary buildings
- b. Locate and evaluate local sources of medical supplies
- c. Determine adequacy of road nets for ambulance evacuation
- d. Establish liaison with government agencies (e.g., USAID) international organizations (e.g., United Nations and Red Cross) and non-governmental organizations (e.g., Doctors without Borders) currently operating in the area
- e. Verify all medical pre-deployment checks

2.11 Communications

- a. Finalize recommendations to the communications plan for the taskforce/MAGTF Commander
- b. Determine requirements for peculiar communications equipment
- c. Determine estimated cost for communications support including leased lines, batteries, and special installation and facilities
- d. Obtain copy of the local phone book
- e. Finalize host-nation/commercial communications support capability
- f. Locate and evaluate sites for commercial telephones within the following areas –
 - 1) AAA telephone systems ability to support the taskforce/MAGTF
 - 2) AAA cable; determine –
 - a) Number of cable pairs available in the AAA
 - b) Number of cable pairs in use
 - c) Number of spare cable pairs available
 - d) Commercial or government-owned systems ability to support the taskforce/MAGTF

- g. Evaluate the following –
 - 1) Circuit layout
 - 2) Data facility
 - 3) Electric power source available
 - 4) Cryptographic equipment (on/off line)
 - 5) Message center operations
 - 6) Distance between communications center and the AAA
 - 7) Delivery procedures
- f. Verify all communications pre-deployment checks

2.12 Navy Support Element

Determine cooperative agreements if operating as an element of or in conjunction with a Navy Support Element (NSE)

2.13 Naval Mobile Construction Battalion

Determine cooperative agreements if operating in conjunction with a Naval Mobile Construction Battalion (NMCB)

2.14 Fleet Hospital

Determine cooperative agreements if operating in conjunction with a Naval Fleet Hospital

3. FORCE PROTECTION ASSESSMENT SURVEY

a. Overview. This Force Protection Assessment Survey (FPAS) is to be used as a guide by SLRP and AP to assess the overall force protection issues and assist in the development of a comprehensive force protection plan prior to the start of operations.

b. Threat Assessment. The SLRP/AP will need to assess the overall threat risk to U.S. personnel, equipment, ships and small craft, including a chemical, biological or radiological (CBR) attack. Threats can be classified as – High, Medium, Low, Normal/Peacetime. The SLRP/AP will also need to identify source documents for the

threat assessment, such as the theater COCOM special intelligence summaries, Naval Criminal Investigative Service (NCIS) and Service counter-intelligence reports, U.S. embassy reports, etc.

c. Force Protection Organization Example FPAS

Force Protection Officer (FPO) - Address - Telephone - Email/SIPRNET	
Air Security Officer (ASO) - Address - Telephone - Email/SIPRNET	
Seaward Security Officer (SSO) - Address - Telephone - Email/SIPRNET	
Landward Security Officer (LSO) - Address - Telephone - Email/SIPRNET	
NCW Units assigned - Address - Telephone - Email/SIPRNET	
U.S. Small Boats assigned - Address - Telephone - Email/SIPRNET	
USMC Landward Security Elements assigned - Address - Telephone - Email/SIPRNET	
Host Nation Seaward Security Elements - Address - Telephone - Email	
Host Nation Landward Security Elements - Address - Telephone - Email	
NAVFOR/Naval Component Commander - Address - Telephone - Email/SIPRNET	
MARFOR Commander - Address - Telephone - Email/SIPRNET	

d. Afloat Forces Example FPAS

Class	Qty	Mission	Length & Draft	Crew Size	Endurance	Weapons	Sensor	Comms	Home Port

e. Air Assets Example FPAS

Class	Qty	Mission	Length & Draft	Crew Size	Endurance	Weapons	Sensor	Comms	Home Port

f. Land Forces

- 1) Mission
- 2) Capabilities
- 3) Command and Control
- 4) Reporting relationships
- 5) Augmentation and support requirements

g. Site Security

- 1) Attach diagram of operating site(s)
- 2) Site access
- 3) Field of fire layouts (surveillance and weapons), indicate on site diagram –

- a) Coverage
- b) Shadows/gaps
- c) Geographic/physical conditions
- d) ROE/terrorist conditions
- e) Forces assigned to site security
- f) Reporting relationships
- g) Communications
 - i) Landline
 - ii) Communication plan (w/frequencies)
 - iii) Data links to CP
- h. Host-Nation Ground Forces (Rear Area Command) Command –
 - 1) Address
 - 2) Telephone
 - 3) Agency Head/Chief/Commander
 - 4) Primary POC
 - 5) Communications
 - a) Message plain language address directory (PLAD)
 - b) Communication plan (w/frequencies)
 - c) Email
 - 6) Responsibilities/AOR
 - 7) Interface with civil authorities

i. Host-Nation Military Installations Example FPAS

	Installation A	Installation B	Installation C
Base Name/Command			
Mission			
Forces			
Address			
Commander			
POC			
Telephone			
Message PLAD			
Email			

j. Multinational Military Installations Example FPAS

	Installation A	Installation B	Installation C
Base Name/Command			
Mission			
Forces			
Address			
Commander			
POC			
Telephone			
Message PLAD			
Email/SIPRNET			

k. Include General Comments Regarding Host-nation/Multinational Forces –

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APPENDIX C: CONTINGENCY CONTRACTING & HOST-NATION SUPPORT

A. CONCEPT OF LOGISTIC SUPPORT OPERATIONS

The concept of logistic support is to create a broad outline of how a commander intends to support and integrate a concept of operations (CONOPS) into an operation or a campaign.⁴¹ Two key elements of the logistic support CONOPS are contingency contracting and the use of host-nation support (HNS). In recent operations, contingency contracting and HNS have become increasingly more important as organic military logistic capabilities are stretched and operational tempo increases. Contracting and HNS are also essential in exercise planning and execution because of limited strategic lift that is typically apportioned to exercises. Contingency contracting and HNS are important force multipliers because they reduce the necessary logistic footprint for a deployed force. Efficient use of these tools can greatly enhance a force and effective advanced planning can mitigate the anticipated, inherent risks associated with a mission when the Logistics Officer or Contracting Officer enters the theatre of operations.

Contingency contracting support plans (CCSP) and HNS plans (HNSP) are not new concepts and are only a part of the logistic support CONOPS, but very little written guidance has been proffered on the subjects. HNS is provided by the country in which operations are taking place. HNS is intended to provide the desired civil and military assistance from coalition or allied nations for the care and feeding of deployed U.S. forces.⁴² HNS differs from contingency contracting in that HNS is granted by a foreign nation based upon an international agreement. Reimbursement or other compensation for HNS may be obtained quid pro quo or as part of a mutual defense program.⁴³ Contingency contracting is direct contracting support and complies with Defense Federal Acquisition Regulations. Contingency contracting offers consideration that is standard with any contract in return for the goods or services that are obtained in support of

⁴¹ JP 4-0.

⁴² Ibid.

⁴³ Army Regulation 570-9.

tactical and operational forces engaged in the full spectrum of armed conflict. Contingency contracting may be conducted in either a mature or an immature environment. Mature environments will likely possess a stable government, a business infrastructure that is capable of supporting and sustaining operations, and will have established contracts or the legitimacy to enter into contracts with the U.S. government. Immature environments are more austere and will require a unit to have inherent capabilities to write and execute contracts.⁴⁴ In either situation, understanding the environment, knowing the resources that are available, and conducting proper planning are necessary to utilize the benefits of contracting and enhance mission effectiveness.

Contingency contracting and HNS are different, but they can be included in the same overall plan since the materiel and services obtained are typically provided by or within the country in which the operation is taking place. Although the CCSP and HNSP are different, the Logistics Handbook will address them equally because they are interrelated and can be written into the same supporting plan or Appendix 14 to Annex D of an OPORD.

1. Contingency Contracting Planning Model

By doctrine, Services are to provide for their own logistics and combat service support.⁴⁵ The Navy has no current doctrine that fully addresses contingency contracting, therefore The *Yoder Three-tier Model for Optimal Planning and Execution of Contingency Contracting* is an excellent resource for understanding and developing a supporting CCSP or for inclusion into an OPORD. The *Yoder Model* recommends a defined establishment, a hierarchical structure, and responsibilities that a large-scale contingency contracting component would need to support a combatant commander. The *Yoder Model* has a great deal of merit, but the complete model is outside the scope of the Logistics Handbook and will be used to discuss a contingency contracting plan that fits the scope and responsibility of the unit or taskforce level, naval expeditionary logistician.

⁴⁴ E. Cory Yoder. "The Yoder Three-tier Model for Optimal Planning Execution of Contingency Contracting."

⁴⁵ E. Cory Yoder. "Deliberate & Crisis Action Planning."

The *Yoder Model* addresses four phases of contingency contracting; mobilization and initial deployment, build-up and stabilization, sustainment, and termination and redeployment.⁴⁶ It is important to note that these phases may not be concurrent with the five operational phases addressed in Joint Publication 5-0, Doctrine for Planning Joint Operations.

a. Phase I: Mobilization and Initial Deployment

Phase I is the initiation of the contingency contracting operation and includes the initial 30 – 45 days of support operations. The essential tasks in Phase I emphasize basic life support, security, and the establishment of relationships with other supporting elements that are operating within the AOR. Life support may be required for more than combat forces dependent upon the nature of the mission. Termination criteria for Phase I must be determined in advance and can include the establishment of items of basic life support. Items on the life support list to consider, in order of importance:

- Potable and non-potable water sources
- Subsistence
- Sanitation
- Shelter for habitation and equipment
- Transportation
- Fuel
- Utilities
- Non-organic security
- Interpreters, guides, and country/culture briefs
- Liaison with host-nation, interagency, and non-governmental organizations working within the AOR (foreign military or state representatives, USAID, State Department, Red Cross, etc.)

⁴⁶ Adapted from “The Yoder Three-tier Model for Optimal Planning Execution of Contingency Contracting.”

b. Phase II: Build-up and Stabilization

Phase II will extend from approximately day 45 of support operations and will continue until termination criteria have been met. Priority must be given to continuing the basic life support and security elements of Phase I. Termination criteria for Phase II will likely be ambiguous, but can include a shift from a “pull” system to a “push” support strategy in which the supported elements are receiving materiel and services when needed vice ordering when identified and then awaiting delivery. Tasks associated with Phase II include:

- All aspects of Phase I
- Construction and infrastructure
- Habitability
- Quality of life and morale, welfare and recreation
- Establishment of a solid and reliable vendor base
- Contracting control and administration

c. Phase III: Sustainment

The duration of Phase III will be very subjective and potentially last months or years. Phase III may eventually resemble a home-port operation. It is likely that Phase III of a contingency contracting operation will lose an expeditionary flavor and become increasingly stabilized and standardized. Additional functions of the operation that may be included in Phase III:

- All aspects of Phases I and II
- Establishment of indefinite delivery type contracts
- Blanket purchase agreements
- Improving and refining internal controls
- Increasing the vendor and supply base
- Executing contracts for services not available in the host-nation or

the AOR

- Planning and contracting for termination of operations (disposal, transportation, site clean-up, etc.)
- Developing further contingency plans that may include creating “dormant contracts” for extraordinary events

d. Phase IV: Termination and Redeployment

Phase IV will continue to provide the materiel and services in Phases I – III, but will begin to focus on functions required to terminate operations in an orderly and expeditious manner. The end state of the operations must be clearly defined by the commander and achieving the end state will signal the commencement of Phase IV. This can be particularly challenging because the end state may not be fully recognizable and potentially ambiguous. Phase IV may come quickly and rapid withdrawal of forces from an AOR may be necessary, which will significantly shorten the timeline and duration of Phase IV. Proper planning and preparation for Phase IV will enable a quick implementation and execution of the necessary tasks:

- All aspects of Phase I
- Reduced emphasis on aspects of Phases II and III
- Transportation
- Packing and freight services
- Contract termination
- Contract close-out
- Auditing existing accounts and contracts
- Securing accountability
- Complementing the commander’s exit strategy

It is also necessary to identify a clear and orderly hand-off of contracts and/or services that may have been provided to parties that will be in the AOR after the close-out and exit of the primary party. This may include Joint, host-nation or coalition forces, and interagency or non-governmental organizations.

e. Identifying Roles and Responsibilities in a Contingency Contracting Operation

The roles and responsibilities that are identified in the *Yoder Model* are critical to the implementation and success of a contingency contracting operation. Segregating tasks reduces the potential of fraud and negligence in contracting and protects the commander and all others from illegal or nefarious activities. Complying with the recommendations of Table (3) will ensure that the contracting operation complies with required training and functional separation as required by federal regulations. The Logistics Handbook modifies the titles in Table (3) slightly to reflect more commonly used and identifiable terms and titles used in the Joint arena.

Table 3. Yoder Three-tier Model for Contingency Contracting Operations

Model Title & Tier Level	Functions/Education/Rank	Highlights/Drawbacks
Ordering Officer – Tier One	<ul style="list-style-type: none"> • Basic ordering • Some simplified acquisitions training: GCPC certification, DAU CON 234, DAWIA Certified CON Level I or II • Junior to mid-grade enlisted, junior officers, GS-7 – GS-9 1102 series civilians 	<ul style="list-style-type: none"> • Simple buys with little integration • No operational planning • No broad liaison functions
Contracting Officer – Tier Two	<ul style="list-style-type: none"> • Leverages local economy • Warranted with contracting authority • Reduces CONUS material support DAU CON 234, recommend higher education DAWIA Certified CON Level II or III • Senior enlisted, junior to mid-grade officers, GS-11 or higher 1102 series civilians 	<ul style="list-style-type: none"> • Better local operational planning • Some integration with other forces • More capability for the operational commander • No planned theater integration • No broad liaison functions • May perform to optimize local operations to the detriment of theater operations
Principal Assistant Responsible for Contracting (PARC) – Tier Three	<ul style="list-style-type: none"> • Highest level of planning and integration • Joint linked/integrated with J-4 and J-5 • Creates and executes OPLAN CCO strategy • Provides direction to tiers-one & two • Links operations strategically to theater objectives of COCOM • Master’s degree or higher, Joint Service Officer, DAWIA Certified CON Level III, other DAWIA disciplines (LOG, ACQ, FIN, etc.) • Senior officers (0-5/6), GS-13 or higher 1102 series civilians 	<ul style="list-style-type: none"> • Performs operational and theater analysis and integrates results into OPLAN/ CONPLAN • Link between COCOM and OPLAN/ CONPLAN to all theater contracting operations • Coordinates theater objectives with best approach to contracted support • Can achieve broader national security goals through effective distribution of national assets • Includes planning, communication, coordination, and exercising with NGO and PVO in theater

2. Basic Contingency Contracting Support Plan

The contents and format of a CCSP are not mandated or specified. The CCSP will be developed by the Logistics or Contracting Officer in a manner that best suits the needs of the operation and in a format that can be readily understood by all users of the plan. The CCSP should specifically address each phase of the contingency contracting operation, termination criteria for each phase, and the types and titles of positions that will be established. Topics that should be addressed in a typical CCSP⁴⁷:

- Command, control, and coordination (as would be the case with interagency and non-governmental organizations)
- Location and structure of the contracting office and sub-offices, including which customers will be supported by each
- Procedures for appointing, training, and employing ordering officers, contracting officer representatives, disbursing agents, and Government-wide Commercial Purchase Card holders
- Manpower, equipment, and supplies required for contracting support and the deployment sequence
- Types of supplies, services, and construction customers can expect to receive through contingency contracting; list any special prioritization or control measures for scarce commodities or services
- Procedures for defining, validating, processing and satisfying customer requirements
- Procedures for budgeting and payments to vendors
- Procedures for closing out contracting operations and redeployment
- Security requirements and procedures for contracting and contractor personnel

⁴⁷ Contingency Contracting Student Handbook, Chap. 7.

- Specific statutory/regulatory constraints or exemptions which apply to the supported operation
- Concept of contracting operations which is phased and synchronized with the supported plan
- Description and assessment of host-nation support agreements (HNSA), customs, laws, culture, language, religion, and business practices which will impact contracting operations

Another area that needs to be addressed is the environmental impact of the operation. The general rule of thumb is that the U.S. will abide by host-nation environmental laws unless U.S. laws are more stringent. This could have a significant impact on the commander, since these laws may need to be incorporated into some of the service contracts. The CCSP should consider Annex L (Environmental Considerations) to the OPORD or the OPLAN in order for it to comply with any special considerations of the operation.

3. Host-Nation Support

a. Host-Nation Support Agreement

The impetus of logistic support traditionally generates from the U.S. and is then forwarded into the theater of operations with organic supporting elements and assets. Commanders, however, should be relieved of the details of logistic support when it is feasible; as long as it does not affect the ability or the control of existing organic logistic support. This can be accomplished through judicious implementation of HNSA and the use of HNS. The U.S. invests large sums of money into the economies of nations that provide HNS and expenditures in support of operations and supporting local businesses and infrastructure is a second-order effect of utilizing HNS.

HNS, whether wartime HNS (WHNS) or peacetime, has been addressed in a few Field Manuals and Army Regulations, but not in earnest and HNS has only a minor mention in Navy or Marine Corps logistics references. HNSA as a part of an OPLAN are likely to be classified because of the sensitivity of the HNSA contents as it relates to the OPLAN. Inasmuch, HNSA may not be readily discussed by naval commanders and may

not be utilized in peacetime or during exercises by naval logisticians or commanders. The concept of HNS is not widely known or understood in the Army either.⁴⁸ An additional problem with HNS, is that the supporting government may not have the resources to adequately provide agreed upon support at a time of crisis. These reasons are perhaps why HNS, although important, is given a pass by those who need it most and only pay it close attention when HNS is truly needed.

HNSA of an OPLAN are not typically the responsibility of a unit level or even a taskforce logistician. HNSA of this level are determined through significant negotiations by the Department of State or the combatant command (COCOM) in the AOR. A COCOM staff will have the responsibility of agreeing upon and developing HNRP that result from HNSA in contingency planning. In crisis action planning, however, extracting HNS from the AOR and HNSA development may fall upon the lowest level possible; the end-user.

HNSA require deliberate and continuous coordination between nations because of HNSA complexity.⁴⁹ Joint and coalition coordination of HNS is also important to ensure that resources are adequately shared and to minimize competition. Consistent monitoring of HNSA by end-users, not just planners, will prevent potential problems such as price fluctuation and lack of available resources when HNS is called upon. All players benefit from full disclosure and mutual collaboration. Maximizing HNS can result in shorter lead-times for materiel and services and provide a greater benefit to the local economy. Ensuring that the local services and commodities are not stressed to the point of hurting local infrastructure is critical because it improves the chances that HNS will be available. HNS can provide combat service/combat service support (CS/CSS) which will speed the process of reception, staging, and onward-movement and integration (RSO&I) of naval and Joint forces. HNS can also enhance operational flexibility as a significant force multiplier because HNS permits a commander to reduce the logistics footprint and increase CS/CSS sustainability.

⁴⁸ FM 100-8.

⁴⁹ Ibid.

Prudent use of HNS must allow the mission to be performed even if the host-nation provider fails to deliver the agreed-upon materiel, therefore WHNS and HNS should be readily tested during exercises and at any other point that is practical for the unit that intends to use HNS at a time of crisis. Exercises and interoperability conferences should be used to validate the adequacy of HNSA and the ability of the host-nation to support RSO&I for naval and Joint forces.⁵⁰

b. Host-Nation Support Plan

The Army gives consideration to two types of HNS; planned and ad hoc.⁵¹ Planned HNS is pre-planned and is negotiated based upon international, U.S., and host-nation law. Requirements for planned HNS should be identified for generic units operating in an anticipated environment and with widely accepted procedures to avoid planning for specific units with unique needs. Ad hoc HNS is support requested during a crisis or for support that was not previously identified. Since a host-nation will likely be focused on its own needs when ad hoc HNS is requested, requirements may not be fulfilled in an ad hoc scenario.

If the time for preparing a HNSP is made available, whether for an exercise or a contingency, the Logistics Officer should take advantage of any and all services and facilities that are offered. If a need is not met by what has been offered by the host-nation, there is no harm in asking for the requirement, but compensation may be requested in return.

The infrastructure of the AOR is a key source of logistics. Common areas of HNS for request are; facilities, transportation, construction equipment and material, subsistence, lodging, arrival and assembly areas, civilian supplies and labor, and base operating areas. There are three factors that influence the use of HNS in an operation;⁵²

- Capability, dependability, and willingness of the host-nation to provide assistance

⁵⁰ Army Regulation 570-9.

⁵¹ FM 100-8.

⁵² Ibid.

- Risk associated with a dependence upon HNS
- Security concerns associated with allowing host-nation personnel and equipment within secured perimeters or the ability for host-nation to influence operations

Although there is no widely accepted or standardized construct for an HNRP, Logistics Officers should have a minimum of information in the plan and related documentation.⁵³

- Existing HNSA and the details of such
- Command, control, and coordination details
- Categories of support should be listed by type of materiel and services; including classes of supply, anticipated delivery schedules and quantities
- Procedures and policies for requesting and utilizing HNS
- HNSA materiel and services that are not to be used and rationale for not taking advantage of these agreements

When pre-existing agreements do not exist and formal agreements cannot be formally accepted in time for operations, estimates of HNS/WHNS expected to be available need to be written into the HNRP. Such estimates should be based on the assumption of a permissive environment or that the host-nation government requested U.S. forces to be deployed in the AOR. Assessments of the ability of the host-nation and the probability of host-nation willingness to provide support to U.S. forces should also be mentioned in the plan. These estimates and assumptions should be listed separately from any lists of existing HNSA or WHNS agreements. Estimated categories of support should be listed in a similar format as known support with the addition of statements regarding operational impact of non-availability.

⁵³ Army Regulation 570-9.

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