

UNITED STATES MARINE CORPS
MARINE CORPS CIVIL-MILITARY OPERATIONS SCHOOL
WEAPONS TRAINING BATTALION
TRAINING COMMAND
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STUDENT OUTLINE

STAFF INTEGRATION

CAC-PLAN-204

CIVIL-MILITARY OPERATIONS PLANNER COURSE

M020AQD

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LEARNING OBJECTIVES

a. TERMINAL LEARNING OBJECTIVES

(1) Given a mission, commander's intent, CPB planning support products and as a member of a Civil-Military Operations Working Group, integrate Civil-Military considerations into the planning process, to support the commander's decision making by providing an understanding of the civil environment and the nature of the problem in order to identify an appropriate solution, in accordance with MCWP 3-33.1. (CACT-PLAN-2001)

(2) Given a group setting, with the aid of references and given a mission tasking, apply critical thinking, to provide objective analysis to the commander/staff throughout the decision making process, in accordance with Applied Critical Thinking Handbook 7.0. (0506-RDTM-2002)

b. ENABLING LEARNING OBJECTIVES

(1) Without the aid of references, define critical thinking, in accordance with the Applied Critical Thinking Handbook 7.0, Ch IV. (0506-RDTM-2002a)

(2) Without the aid of references, define the information hierarchy, in accordance with MCDP-6, Ch 2. (0506-RDTM-2002b)

(3) Without the aid of references, define decision making theory, in accordance with MCDP-6, Ch 2. (0506-RDTM-2002c)

(4) Without the aid of references, define staff integration mechanisms, in accordance with MCWP 5-1. (CACT-PLAN-2001d)

(5) Without the aid of references, define the purpose of a CMO working group, in accordance with MCWP 3-33.1, Ch 4. (CACT-PLAN-2001e)

(6) Without the aid of references, define the role of the CMO working group ISO the MAGTF OPT, in accordance with MCWP 3-33.1, Ch 4. (CACT-PLAN-2001f)

1. **THE ROLE OF THE STAFF.** The role of the staff is to inform and focus the commander and reduce the commander's tasking to a manageable level. The staff is a key component of MAGTF Command and Control. The staff supports the decision making process by gathering and processing information into usable form. Once the commander makes decisions, the staff promulgates them in the form of plans or orders.

a. **Where do you Fit?**

(1) Marine Corps staffs vary greatly in size and composition. A commander has broad authority to organize the staff as he requires. Factors influencing the staff's organization will include mission requirements, the operational environment, capabilities of subordinates, and the commander's own preferences. Broadly speaking, the commander will group his staff members into a personal staff, a principal staff, and a special staff. The personal staff is normally composed of aides-de-camp, the Sergeant Major, and personal secretaries. It is directly responsible to the commanding general. The principal and special staffs are directed, coordinated, and supervised by either a Chief of Staff (COS) when the commander is a general officer or an executive officer (XO) when he is not. When the commander is a general officer, the principal staff is typically referred to as the general staff.

(2) The civil-military operations (CMO) planner and/or senior civil affairs (CA) Marine advises the commander on CMO and CA operations (CAO), supports operational planning, and coordinates CMO/CAO with military and civilian organizations within the AO. Typically the CMO planner / senior CA Marine falls under the cognizance of the G-3 / S-3. However, the commander may find it more effective to position the CMO planner / senior CA Marine as a member of the general staff (typically the Assistant Chief of Staff, G-9) rather than under the cognizance of the G-3. Similarly, the CMO planner within the infantry regiment may be assigned the role of the S-9.

b. **Problem Solving**

(1) Planning is an essential element of command and control. The commander initiates the planning process by organizing his staff to gather, manage, and process information essential to decision making and execution. Planning supports decision making by helping the commander and staff appreciate the larger environment and understand the true nature of the problem.

(2) Staff officers must be adept at analyzing situations and applying appropriate problem-solving skills in order to provide organized, coordinated, and well thought-out inputs to questions and tasks. Similarly, staff officers must understand the MAGTF's mission and logically place tasked assignments in context, and identify courses of action that will more effectively meet mission goals / objectives. Finally, staff officers must be able to accurately analyze their workloads to determine priorities by importance; to frame each problem in context.

(3) Problem solving models are used to address many issues that come up on a daily basis. These problems may be technical or issue-based. There are many different approaches in order to achieve a solution. Problems can be solved more easily and with better results by using a problem solving model, i.e., a structured, systematic approach to solving problems. The traditional six-step problem solving process is used in many professional organizations. The steps are: Identify and clarify the problem to be addressed; Analyze the problem and its causes; Identify and assess ramifications of potential solutions; Select and plan the solution; Implement the solution; Evaluate - was the problem solved? The CMO planner will use a problem solving model - the Marine Corps Planning Process!

c. **Critical Thinking**

(1) Critical thinking is hard, deliberative work which takes an open, inquisitive mind. It is not easy, but it doesn't take a genius either. Individuals can choose to believe whatever they hear and see, but to be a critical thinker, you must learn to ask yourself whether you *must* believe what you hear and see. Ultimately, critical thinking is about *what* to believe.

(2) Critical thinking is awareness: critical thinkers are aware of their surroundings, what they do know and (more importantly) what they do not know, and how their thinking can often fool them. Because of this, critical thinkers are self-reflective and defer judgment: they do not jump to conclusions, but rather take time to ask questions, ensure they've considered various perspectives, ask themselves what's missing that needs to be considered, and reflect upon how their values and beliefs may be conspiring to fool them.

(3) Critical thinking is also a process. Good critical thinkers consider various frameworks when thinking about problems, because frameworks force us to consider alternative perspectives that we wouldn't naturally consider.

(4) Critical thinking includes knowing that for many issues, assumptions prevail. Often these assumptions are hidden, or implicit: we make them without realizing that we are doing so. All assumptions need to be challenged. When the assumptions are challenged and found to be faulty, we may have better insight into the nature of the problem. Exploring alternatives is equally important. Otherwise, we take for granted that the first thing that comes to our mind is the way it really is - we fall prey to default-mode thinking, allowing ourselves to be comfortable with the first conclusion we settle upon.

(5) CMO planners need to think critically because people are constantly trying to fool us! In many instances they succeed because we don't think critically enough, or recognize many of the tricks that are being used. Examples of these include rhetorical tricks such as *Appeal to the Masses* (assertion is made that if something is good for everyone else, it must be good for you too), *Demagoguery* (a political leader who tries to get support by making false claims and promises using arguments based on emotion rather than reason), or *Appeal to Fear* (using emotionally charged language to distract readers and listeners from relevant reasons and evidence), *Ad Hominum* (attack a person, and not a position or argument), *False Dichotomy* (when someone presents a complex situation in black and white terms - i.e., they only present two alternatives where many exist), or the *Slippery Slope* (when the conclusion of an argument rests upon an alleged chain reaction and there isn't sufficient reason to conclude that the chain reaction will actually take place) - all common logic fallacies. Critical thinkers are knowledgeable of these common logic fallacies and use logic to deconstruct arguments based upon them.

(6) Therefore, the ideal critical thinker is habitually inquisitive, well-informed, trustful of reason, open-minded, flexible, fair-minded in evaluation, honest in facing personal biases, prudent in making judgments, willing to reconsider, clear about issues, orderly in complex matters, diligent in seeking relevant information, reasonable in the selection of criteria, focused in inquiry, and persistent in seeking results which are as precise as the subject and circumstances of inquiry permit.

d. **Information Hierarchy**

(1) MCDP 6, *Command and Control*, states that the term "information" generically refers to all manner of descriptions or representations from raw signals on the one hand to knowledge and understanding on the other. It further states that it is important to recognize that there are actually *four* different classes of information. We must understand the differences between these classes because they are of different value in supporting command and control. We must also understand what happens to information as it moves between levels on the hierarchy.

(a) Raw "data" comprise the lowest class of information and include raw signals picked up by a sensor of any kind (a radio antenna, an eyeball, a radar, a satellite) or communicated between any kind of nodes in a system. In other words, raw data are signals which have not been processed, correlated, integrated, evaluated, or interpreted in any way. This class of information is rarely of much use until transformed in some way to give it some sort of meaning.

(b) The next class is data that has been processed into or has been displayed in a form that is understandable to the people who must use it. The act of processing in itself gives the data a limited amount of value and is, therefore, more useful to people than raw data – and some may have immediate, obvious and significant value – but has not yet been evaluated or analyzed. This class of processed data is also described as "information."

(c) Following processed data (information) is knowledge – data that has been analyzed to provide meaning and value, reliability, relevance, and importance. Knowledge is various pieces of processed data which has been integrated and interpreted to begin to build a picture of the situation. At this level, we are starting to get a product which can be useful for decision making.

(d) The highest class of information is understanding – knowledge that has been synthesized and applied to a specific situation to gain a deeper level of awareness of that situation. We may know what is going on and we understand why. Understanding results when we synthesize bodies of knowledge, use *judgment* and *intuition* to fill in the gaps, and arrive at a complete mental image of the situation. Understanding means we have gained situational awareness.

Understanding reveals the critical factors in any situation. It reveals the enemy's critical vulnerabilities. It reveals the patterns and logic of a situation. Understanding thus allows us to anticipate events – to recognize in advance the consequences of new or impending developments or the effects of our actions on the enemy or the civil environment. We try to make understanding the basis for our decisions – although recognizing that we will rarely be able to gain full understanding.

(2) Essential to mission success is the shared understanding and appreciation of the operational context and the commander's intent by multiple partners. Shared understanding of the operational environment, the operation's purpose, the problem, and approaches to solving the problem form the basis for unity of effort and trust so critical to CMO. The actions of the Commander and Staff develop understanding.

e. **Decision Making Theory.** All decisions must be made in the face of uncertainty. Theoretically, uncertainty can be reduced by gaining more information, but any such decrease in uncertainty occurs at the expense of time.

(1) There are two basic theories on how we make decisions. The traditional view is that decision making is an *analytical* process based on generating several different options, comparing all the options according to some set of criteria, and identifying the best option. The basic idea is that comparing multiple options concurrently will produce the optimal solution, the result being, analytical decision making tends to be methodical and time-consuming.

(2) The other basic approach, called *intuitive* decision making, rejects the computational approach of the analytical method and instead relies on an experienced commander's (and staff's) intuitive ability to recognize the key elements of a particular problem and arrive at the proper decision. The intuitive approach focuses on situation assessment instead of on the comparison of multiple options. Intuitive decision making aims at "satisficing," finding the first solution which will satisfactorily solve the problem, rather than on optimizing, as the analytical approach attempts to do. Intuitive decision making works on the further belief that, due to the judgment gained by experience, training, and reflection, the commander will generate a workable first solution, and therefore it is not necessary to generate multiple options. Because it does not involve comparing multiple options, intuitive decision making is generally much faster than analytical decision making.

(3) Each approach has different strengths and weaknesses, and determining which approach is better in a given situation depends on the nature of the situation, particularly on how much time and information are available. For example, an analytical approach may have some merit in situations in which commanders are inexperienced or in which they face never-before-experienced problems. On the other hand, the intuitive approach may be more appropriate for the majority of typical tactical or operational decisions – decisions made in the fluid, rapidly changing conditions of war when time and uncertainty are critical factors, and creativity is a desirable trait. Regardless, the CMO planner must learn to operate in consonance with the commander and staff in either decision making environment.

(4) We frequently associate intuitive decision making with rapid/time-sensitive planning and analytical decision making with deliberate planning. This may often be the case, but not necessarily. For example, a thorough, deliberate planning effort in advance of a crisis can provide the situational awareness that allows a commander to exercise effective intuitive decision making. Conversely, the analytical approach of developing and selecting from several courses of action may be done rapidly. The point is that the planning model or process we choose, and the decision making approach that supports it, should be based upon the situation, the time available, the knowledge and situational awareness of the organization, and the commander's involvement in the planning and decision making process. While the two approaches to decision making are conceptually distinct, they are rarely mutually exclusive in practice.

2. **STAFF INTEGRATION.** Effective staff integration is achieved when functional expertise from across the staff and from stakeholders outside the staff comes together to directly support the commander's decision cycle. The key aspect of staff integration involves the creation, management, and use of an effective staff battle rhythm. This is accomplished by a thorough understanding of the commander's decision making style and how he interacts with the staff. Proper staff integration leverages the staff's analytical capabilities by ensuring synchronized interaction between its integrating mechanisms – the command's battle rhythm and its boards, bureaus, centers, cells, and working groups (B2C2WG). B2C2WGs enhance staff coordination and facilitate planning, monitoring, and assessment. Virtual collaboration tools facilitate participation in B2C2WG(s).

a. **Decision Cycle**. The commander's decision cycle operates across three event horizons - current operations, future operations, and future plans. Each event horizon requires battle-rhythm events to support planning, execution, and assessment. The *current operations* event horizon focuses on the 'what is' and can move very quickly. The *future operations* event horizon focuses on the 'what's next' and normally moves slower with more deliberate assessment and planning activities. The *future plans* event horizon focuses on the 'what if,' interacts with higher headquarters planning efforts, and moves very deliberately through the decision cycle.

b. **Battle Rhythm**

(1) The commander's decision cycle is synchronized with higher, adjacent, and subordinate echelon headquarters' decision cycles across all three event horizons. The unit's battle rhythm represents a logical arrangement of the B2C2WGs over time (days, weeks, months), based on the support needed at various phases by the commander's decision cycle.

(2) The staff's battle rhythm is commander-centric. The synchronization of battle rhythm activities focuses on the commander's decision cycle. The staff battle rhythm requires flexibility, adaptability, and the ability to balance mission requirements and HHQ demands. An effective battle rhythm provides structure and foundation for staff and unit level interaction, planning, and prioritization with all inputs and outputs of the battle rhythm events linked together.

(3) A battle rhythm also provides a time management structure for the commander and staff - it must be compatible with the battle rhythms of higher and adjacent commands and other stakeholders. It must provide subordinate commands with timely direction and guidance. It must also prioritize the efforts of critical staff functions that are in high demand for working groups, boards, and operational planning teams. Finally, an effective staff organization needs a logical and mutually supporting system of B2C2WG(s).

c. **Integrated Planning**

(1) The Marine Corps planning process is not conducted in isolation. Usually we establish small groups of representatives from across a headquarters - operational planning teams (OPTs) and working groups (WGs) - that together, tackle problems of varying complexity and organize the details

of these problems in such a way that the commander can make sense of the information. Often times, this effort is centered on a core group of individuals who are responsible for giving and taking information from other specialized groups of individuals and meld the information in such a way that the whole is greater than the sum of its parts.

(2) OPTs are run by the Operations section (G/S-3) or Plans branch (G/S-5). By definition they are focused on operational problems. WGs can be held by any member or section of the staff to examine any issue or problem. This usually occurs at the same time across the headquarters, and with subordinate commands. To help coordinate and harmonize these efforts, we can also establish a supporting B2C2WG structure.

3. THE OPERATIONAL PLANNING TEAM

a. **Definition.** A group built around the future operations section which integrates the staff representatives and resources. The OPT may have representatives or augmentation from each of the standard staff sections, the six warfighting functions, staff liaison, and/or SMEs (MCRP 5-12C).

b. **Purpose.** An OPT is a task-organized planning element that supports the commander and his staff's decision making process. Through its diverse composition, the OPT promotes an integrated planning effort that brings together the commander, representatives or augmentation from his subordinate commanders and staff officers, and those SMEs necessary to develop comprehensive operational plans or orders.

c. **Leadership.** The OPT is usually led by a school-trained Marine Corps Planner at Divisions and above while at Regiments and below, the OPT is run by the most experienced planner in the S-3. Regardless, it is specifically chartered to develop plans for upcoming operations or to find solutions to any problem identified by the Commander.

d. **Support to decision making.** The OPT supports the commander in decision making by designing operations that include all aspects of the battlespace, providing a common venue for sharing information across the battle staff, integrating with the planning efforts of the battle staff and SMEs and coordinating planning activities across the staff and other agencies (e.g. USAID/OFDA, IGO/NGOs) to facilitate unity of effort. The OPT supports the three tenets of MCPP - top down, single battle, integrated planning.

e. **OPT Organization**

(1) Requirements. All members of the OPT must be knowledgeable in their functional area and well versed in MCPP. Regardless of the composition of the OPT, there must always be representatives with expertise in the warfighting functions.

(2) Composition. The OPT will vary based on the mission, but normally consists of the following:

(a) Core: Future Ops/Future plans

1. OPT Leader
2. Assistant OPT
3. Information Manager
4. Recorder(s)
5. C2PC operator
6. Principal staff planners (e.g., Civil Affairs)

(b) Special staff representatives.

(c) Subject matter experts as required by the mission.

(d) Liaison Officers (LNO) from subordinate, adjacent and supporting commands.

(3) OPT member roles

(a) OPT leader. The OPT leader has a close relationship with the commander and primary staff to support understanding of the commander's vision and intent for the planning effort. The OPT leader understands MCPP and tailors the planning process to the purpose and scope of the planning effort. He/she establishes and maintains OPT battle rhythm and is the OPT's decision-maker and final arbiter. He/she is an "Honest Broker," and represents the concerns of all OPT members.

(b) Assistant OPT lead / facilitator. The assistant OPT leader supports the OPT leader in all facets of the OPT's requirements. These include time-management and attendance,

coordinating and monitoring individual break-out groups, may be a "Line of Operation" lead and oversees individual steps of MCPP.

(c) Staff Representatives. Respective Sections will support through their "Plans Officer." These representatives provide a link between the OPT and Principal Staff. They coordinate the development of Staff Estimates, Concepts of Support, and the foundation for Annexes and Appendices. It is extremely important that these representatives are consistently engaged in the process.

(d) Information Manager. The information manager is crucial to the effort, ensuring proper data management, version control of products, information posting / distribution and requests for information management.

(e) CMO Planner's role in the OPT. As the SME on the civil dimension of the battlespace, the CMO planner is an integral part of the OPT, providing analysis on the civil operating environment during each step in the planning process. The CMO planner is a conduit to the CA Staff Principal receiving guidance and providing feedback to the CA Staff Principal. Additionally, he/she will provide information back to the CMO working group on the activities and progress of the OPT and tasks the CMO working group for particular CA/CMO information or products for the overall planning effort.

(f) Subject Matter Experts. Complex operating environments will require expertise that is not usually resident within the MAGTF staff. Such expertise includes interorganizational capabilities and cultural advisor(s) to provide specific expertise when requested. This may also require reach-back capability to tap into this expertise.

(g) Others. Often overlooked, support personnel such as OPT and WG Chiefs, C2PC / CPOF clerks and recorders are crucial to the planning effort. Depending on the Staff level, the following can be represented from within the OPT or by a representative from the standing cell; Assessment Cell - to formulate assessment metrics concurrent with planning effort; Green Cell - to provide civil perspective to the OPT and the Red Cell - to provide threat perspective to the OPT.

(4) Battle rhythm. Time management is critically important to the effective functioning of the OPT. Instituting an OPT battle rhythm is a technique that is often used to

support this. For example, starting each day with a roll call and updates (RFIs, COPs, Intel, MSCs), balancing time between core and "full" members so that there is time for core planners to brainstorm, develop products and synthesize information, time for members to engage respective staff and/or reconvene the group periodically to ensure congruency (azimuth checks). The battle rhythm keeps members aware of where they are in the planning process or what the deliverable is by the end of the meeting. It is important to remember to schedule breaks regularly to reduce fatigue.

(5) Execution

(a) Generating Group Creativity. There are numerous ways to execute planning and the OPT. A basic approach looks to generate group creativity via core brainstorming, group brainstorming and further refinement via specific breakout groups. Breakout groups are most efficient when smaller, consisting primarily of functional experts. The results of these sessions should result in a back brief to the entire OPT on results. Plan and enforce breaks to maintain efficiency!

(b) Product Development. To ensure timely and quality product development, the OPT leader establishes deadlines, clearly articulates expectations to breakout groups, WG members, and staff sections and schedules formal out-briefs.

4. THE WORKING GROUP

a. Definition. An enduring or ad hoc organization within a Joint Force Commander's headquarters consisting of a core functional group and other staff and component representatives whose purpose is to provide analysis on the specific function to users. Also called a WG. (JP 3-33)

b. Role. The WG synchronizes the contributions of multiple staff elements into a process. For example, the CMO WG brings representatives from various staff sections oriented on solving civil-military problems. WGs synchronize the staff, Current Operations and Future Operations with other WGs. Additionally, they are formed and disestablished as needed or directed and their products are sequenced so the outputs of one group are available for others as inputs.

c. **CMO Working Group**

(1) **Role**. The CMO WG is a task organized planning entity that supports the G-9's (or other Staff lead) responsibilities for CMO planning requirements. The CMO WG can be formed and disestablished as needed or directed.

(a) **Responsibilities**. When supporting the CMO planner on an OPT or during the conduct of MCPP, the CMO WG conducts concurrent planning from the civil perspective and provides input as required and requested.

(2) **Composition**. The CMO WG consists of CA staff personnel and relevant SMEs. The composition and scope of the CMO WG vary according to the size of the MAGTF and level of interorganizational involvement. The CMO WG is most effective when there is maximum participation and transparency among interorganizational partners.

(3) **Tasks**. The CMO WG plans concurrently with the OPT and informs the efforts of the OPT via a CMO planner. Additionally, the CMO WG conducts Civil Preparation of the Battlespace, prepares Civil Information Management-related products for assigned area of operations, develops the CMO Staff Estimate, creates the CMO Concept of Support, supports production of Annex G (Civil-Military Operations) and related Appendices and examines/resolves issues, concerns, or problems as directed by the G-9 or Senior CA Marine.

5. **CA MARINE RESPONSIBILITY**

a. **Role in MCPP**. In the absence of a CMO working group or a Green Cell, CMO planning responsibilities may fall on a CA Detachment Officer-in-Charge or even a CA Team leader. Regardless, the CA Marine provides civil dimension analysis to the decision-making process. For example, during Problem Framing the CA Marine assists with framing the problem through the civil preparation of the battlespace process. During COA Development, War Game, Comparison and Decision, he/she describes civil reactions - Most Likely / Most Disadvantageous (disruptive) to the MAGTF, develops a CMO Concept of Support and CMO Tasks, and finally, during Orders Development / Transition, is responsible for writing the CMO / CA portions of the order and/or supports transition briefs to executors.

b. **Personal Preparation**. There is no one perfect way to prepare for staff action. After all, assisting an OPT or being

part of a WG is staff action. Nevertheless, the following points will be helpful:

- (1) Be prepared to work on the staff
- (2) Understand how the staff functions and integrates information
- (3) Interact amongst other staff members
- (4) Effective staff integration requires interpersonal skills and an understanding of group dynamics
- (5) Review pertinent command references (Operations Orders, FRAGOs, SOPs, etc.)
- (6) Formulate a staff integration plan
- (7) Report to the Commander or Chief of Staff/XO
- (8) Observe staff & OPT dynamics
- (9) Actively participate in all staff processes, including OPTs

REFERENCES:

MCDP 6, Command and Control
MCWP 5-1, Marine Corps Planning Process
MCWP 3-33.1, MAGTF Civil-Military Operations
Applied Critical Thinking Handbook 7.0

