#### STAFF PAPERS

STANDARDIZATION OF DOCUMENT FORMATS. Staff papers and other written correspondence will be standardized to the maximum extent possible. Staff officers are responsible for completing staff papers and other written correspondence on time, on target, and in the required format.

**DOCUMENT ASSEMBLY**. Staff officers will prepare all correspondence, including naval messages forwarded to the CG, DCG, or COS as follows:

- 1. Enclose the correspondence in right-hand side of a pocket folder. For classified packages, use appropriately colored cover sheets (i.e., orange Top Secret; red Secret; blue Confidential,). Unclassified material does not require a cover sheet. The cover sheet will reflect the highest classification of the material in the package. The pocket folder will contain the following:
  - a. Classification cover sheet (as required).
- b. Pocket Folder: Color varies according to urgency/type of correspondence presented. Red = time sensitive/urgent material. Green = routine/general correspondence. Blue = Fitness Reports.
- c. Route sheet. The route sheet is one of the most important documents in the package. It reflects staff coordination and summarizes the package with emphasis on purpose, background, and recommendation(s).
- d. Originals of correspondence, requiring action or provided for information; including originals of previous endorsements, in proper sequence. The action/information document is the first enclosure under the route sheet.
- e. All documents referenced on the original correspondence and appropriately tabbed. Replace reference documents too large to include in the package with a "filler sheet" containing the title/subject, brief summary of applicable material, and location of the reference.
- f. All enclosures arranged numerically, with lowest number on top, plainly tabbed.
- 2. Do not include drafts, check-off lists and other superfluous paperwork in packages.

#### STAFF PAPERS - STANDARD FORMATS

**STANDARD FORMAT FOR SUBMITTING PACKAGES**. Staff officers will prepare staff papers and other correspondence in standard format and Courier New font, 10 or 12 point type as specified below:

- 1. Sample Trip Report (Figure 1).
- 2. Sample Position Paper (Figure 2).
- 3. Sample Information Paper (Figure 3).
- 4. Sample Point Paper (Figure 4).
- 5. Sample Decision Paper (Figure 5).
- 6. Sample Memorandum for the Record (Figure 6).
- 7. Sample Standard Naval Letter Format (Figure 7).
- 8. FRAG Order Format (Figure 8).

# TRIP REPORT (Figure 1)

- 1. Staff officers will submit trip reports, when necessary, within five working days of returning from the trip. Figure 4-1 is the trip report format. Staff officers will brief urgent reports to their Process Owner and/or the COS immediately after returning from the trip.
- 2. Process Owners will route trip reports to the COS, DCG, and CG as necessary and to other Process Owners, Executive Staff, or Special Staff Principals who have action or require information relating to matters covered in the report.
- 3. Staff officers will not distribute trip reports outside the Command Element unless approved by the Process Owner.



II MARINE EXPEDITIONARY BRIGADE II MARINE EXPEDITIONARY FORCE PSC BOX 20080 CAMP LEJEUNE, NC 28542-0080

> SSIC ORIG CODE DD MMM YY

From: Rank FName MI LName, Billet, Process/Section

To: Commanding General, or Deputy Commanding General, or Chief of

Staff

Via: Respective Staff Section (G,2,3,4 etc.)

Subj: TRIP REPORT; CAMP BONNY, NIGERIA

- 1. <u>Background</u>. (On DD Mmm YY) (From DD Mmm YY to DD Mmm YY), G9 personnel conducted a (site survey, conference attendance, assist visit, etc) manpower assist visit to Camp Bonny, Nigeria.
  - a. Travelers: Rank Last Name, Billet, Organization Rank Last Name, Billet, Organization
- 2.  $\underline{\text{Purpose}}$ . To collect and discuss camp manning issues with Camp Commanding Officer and staff, in order to develop an improved manning document supporting mission requirements.
- 3. Points of Contact

Rank, Name	Billet	Organization	Phone	E-mail

- 4. <u>Synopsis</u>. The state of Camp Bonny's manpower assets is such that, although mission objectives are being accomplished, there will be a point where . . . .
- 5. Key events/discussion points/action required

a. Item: XXXXXXXX

Discussion:

Recommendation:

6. Remarks

I. M. RESPONSIBLE Captain, USMC

Copy to: 7000260 (2)

## POSITION PAPER (Figure 2)

- 1. The position paper develops and recommends an official position on a particular issue. It includes a clear statement of why an official position is required, essential background on the problem or subject, and rationale for the recommended position. A position paper usually requires rapid research to identify key sources of information pertaining to the topic. The author must make a sound analysis of the information and write the paper in a clear, concise, and accurate format.
- 2. Figure 4-2 is the position paper format. The heading contains the classification, the originators office code, the date, and the designation "POSITION PAPER." The subject is clear and concise and references, if used, are standard and self-explanatory.
- 3. The problem statement clearly and concisely articulates the issue and normally begins with, "To develop a position..." The author also states why a position is required. The background summarizes what has gone before. The positions of others are summarized when appropriate; otherwise, "Not Applicable" is used in Paragraph 4.
- 4. The recommendation clearly, concisely, and concretely states the action requested, e.g. "approve attached statement" or "study. . .,". Each recommendation includes a "decision ladder" for record. Once a decision has been made regarding the recommendation, the originator will take the appropriate staff action.



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#### POSITION PAPER

Subj: THE SUBJECT MATTER IS INDICATED BRIEFLY BUT IN SUFFICIENT DETAIL TO FACILITATE FILING AND FUTURE REFERENCE

Ref: (a) List references as appropriate

## 2. WHY REQUIRED

- a. A position paper also states "why" the paper is required.
- b. It is directed by higher headquarters.

#### 3. BACKGROUND

- a. The background sets forth, in concise terms, what has gone before.
- b. It provides answers to such potential questions as: is this an ongoing problem? Did something suddenly occur that requires resolution?
- 4.  $\underline{\text{POSITION OF OTHER AGENCIES}}$ . Address the position of other agencies when appropriate, otherwise, this part of the position paper has the caption "Not Applicable" inserted.
- 5. RECOMMENDED POSITION. State the recommended position in clear, concise terms.
- 6.  $\underline{\text{RATIONALE}}$  The rationale includes concise statements which support the position taken.
- 7. RECOMMENDATION. The recommendation is what you recommend be done: e.g., "Approve the attached statement", or "Reconsider." A "decision ladder" is included for the decision to be recorded by the approving authority. The attached statement of the position, referred to in paragraph 5, is usually prepared on a mat, ready for reproduction. The decision signatures can indicate approval, at which time promulgation can quickly take place.

/s/ (Staff Agency Head) Subj: THE SUBJECT MATTER IS INDICATED BRIEFLY BUT IN SUFFICIENT DETAIL TO FACILITATE FILING AND FUTURE REFERENCE

For Decision by the Commanding General

Cos Recommends:	Approval
	Disapproval
DCG Recommends:	Approval
	Disapproval
CG's Decision:	Approved
	Disapproved

NOTE: When there are multiple recommendations, submit a "decision ladder" for each recommendation. If the decision ladder falls on a separate page from the recommendation, give a brief synopsis of the recommendations with the decision ladder.

Prepared by: (Rank, Name, Billet Description and Phone Number)

# INFORMATION PAPER (Figure 3)

- 1. An information paper is a one-page discussion of facts, plus opinions, suggestions, arguments, or matters needing resolution.
- 2. Write the paper in a brief, "telegraphic" style that can stand-alone; however, you can attach graphs, schedules, and background data, if required. The heading contains the classification of the paper, the originator's office code, the date, and the caption "INFORMATION PAPER." Indicate the subject in concise terms. Then, list the salient points that relate to the subject in short, logically arranged, concise statements.



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SSIC Sponsor Code Date Signed

#### INFORMATION PAPER

- 1. SUBJECT: Use a word or phrase to define the topic.
- 2. <u>BACKGROUND</u>. Briefly describe the situation to enable the reader to grasp information in context. Don't overshadow facts treated in the body of the paper. List references bearing on the issue.
- 3. PURPOSE. Use this entry if someone requested the information.
- 4.  $\underline{\text{CONCLUSION}}$ . In a sentence or two, state the bottom line or your interpretation of the information. Do not make recommendations use a decision paper for that.

#### 5. DISCUSSION

- (a) Use an information paper:
  - To provide background and status of an action
  - To provide information on request
  - As backup information at briefings
  - To discuss implications of facts, make interpretations, offer opinions, note opposition, emerging problems, or matters for coordination
- (b) For informal use, prepare an information paper on 8-1/2 by 11 inch, plain bond paper. For information sent outside your headquarters, a formal format is more appropriate (see Figure 7).
- (c) Present information in a sequence the reader most likely expects or readily understands.
- (d) Limit content to a single subject, written on a single page. Provide only enough detail for information to stand alone. If you need more space, use a tab. Use one only if necessary.

- (e) If coordination is involved, show it at bottom of the page or at a tab.  $\,$
- (f) POC. List point of contact, office code, telephone, and e-mail.

# POINT PAPER (Figure 4)

- 1. The point paper presents key points, events, positions, or questions in a brief and orderly fashion.
- 2. Normally, the paper does not exceed one page. Write the paper in a brief, "telegraphic" style that can stand-alone; however, you can attach graphs, schedules, and background data, if required. The heading contains the classification of the paper, the originator's office code, the date, and the caption "POINT PAPER." Indicate the subject in concise terms. Then, list the salient points that relate to the subject in short, logically arranged, concise statements. Follow these points with a brief, pithy summary. This may include any conclusion or position that is appropriate.

#### Figure 4: Sample Point Paper



## **UNITED STATES MARINE CORPS**

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Orig. Code Date

#### POINT PAPER

To: Commanding General, or Deputy Commanding General, or Chief of Staff

Subj: THE SUBJECT MATTER IS INDICATED BRIEFLY BUT IN SUFFICIENT DETAIL TO FACILITATE FILING AND FUTURE REFERENCE

1. <u>BACKGROUND</u>. The background sets forth in concise terms what has gone on before; it provides answers to potential questions such as, "Is this an ongoing thing," or "Did something suddenly create this requirement?"

#### 2. DISCUSSION

Prepared by:

- a. The discussion is a concise narrative of all the salient points related to the topic under discussion.
  - b. References that are used as a source are cited in the discussion.
- 3. <u>RECOMMENDATION</u>. Reduce recommendations to clear, concise statements that permit straightforward approval or disapproval by the approving authority.

Approved by:

Rank, First/Last Name Billet	Rank, First/Last Name Billet
Derived From	
Declassify On (if applicable - mus standards)	t be IAW existing classification

# DECISION PAPER (Figure 5)

- 1. This paper requests a decision and only includes facts relevant to the decision. Decision papers are self-explanatory, and normally do not include enclosures. You may attach decision papers to other documents. A "decision ladder" is required, see figure 4-4.
- 2. Figure 4-4 is the decision paper format. Place the appropriate office symbol/code and date in the upper right hand corner of the page. (The date is the day of dispatch from the originating agency.) You may alter the format to meet specific needs.



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Section Code Date

#### DECISION PAPER

Subj: THE SUBJECT MATTER IS INDICATED BRIEFLY BUT IN SUFFICIENT DETAIL TO FACILITATE FILING AND FUTURE REFERENCE

1.  $\underline{\text{PURPOSE}}$ . State the purpose of the decision paper. Usually begins "To obtain a decision regarding..."

#### 2. BACKGROUND

- a. Describe in concise terms the actions and events leading to the requirement for this decision.
- b. Follow a logical progression, either chronological or by order of importance.

#### 3. DISCUSSION

- a. Describe in concise terms the relevant factors impacting on the issue, both pros and  $\operatorname{cons}$ .
- b. Follow a logical progression, either chronological, by order of importance, or pros and cons.
- 4. <u>CONCLUSION</u>. Considering the background and discussion points, succinctly summarize the issue's key factors and your conclusion. Example: "Utilization of the proposed fuel cell system will result in substantial monetary savings, and will provide more efficient energy to Camp Bonny. No detrimental impacts will occur."
- 5. RECOMMENDATION. The recommendation is what you recommend be done. (i.e.—"Approve the purchase of new computers"). Include a "decision ladder" in order to record the decision by the approving authority.

Prepared by: Approved by:

Rank, First/Last Name
Billet

Rank, First/Last Name
Billet

Subj: THE SUBJECT MATTER IS INDICATED BRIEFLY BUT IN SUFFICIENT DETAIL TO FACILITATE FILING AND FUTURE REFERENCE

For Decision by the Commanding General

CoS Reco	mmends:	Approval	
		Disapproval	
DCG Reco	mmends:	Approval	
		Disapproval	
CG's Dec	ision:	Approved	
		Disapproved	

#### NOTES:

- 1. When there are multiple recommendations, provide a "decision ladder" for each recommendation. If the decision ladder falls on a separate page from the recommendation, provide a brief synopsis of the recommendation with the decision ladder.
- 2. Decision papers should not exceed two pages in length. Supporting documentation is included as tabs to the paper.

# MEMORANDUM FOR THE RECORD (Figure 6)

- 1. A memorandum for the record (MFR) summarizes the results of formal or informal discussions, conferences, meetings, telephone conversations, and the like.
- 2. The memorandum for the record is used as an in-house record of significant information or as a place holder/filler in the absence of the actual documentation. It often reflects ongoing action and the associated background. MFRs are often shared with others, either formally or informally, to facilitate staff coordination and action.
- 3. Figure 6 is the memorandum for the record format.



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DD Mmm YY

#### MEMORANDUM FOR THE RECORD

Subj: THE SUBJECT MATTER IS INDICATED BRIEFLY BUT IN SUFFICIENT DETAIL TO FACILITATE FILING AND FUTURE REFERENCE

- 1. Use a "Memorandum For The Record" (MFR) as an internal document to record information in the record that is not recorded elsewhere. Examples include results of meetings, telephone conversations, oral agreements, and other relevant information.
- 2. Type or handwrite these most informal memorandums. If it is only two or three lines, include it on the file copy of your document. Leave out the subject line if you add your MFR to the file copy.
- 3. A full "signature" block and identification symbols are not required. However, it should be dated, signed, and show the signatories' organizational code.

I. M. RESPONSIBLE OPS, G9



II MARINE EXPEDITIONARY BRIGADE II MARINE EXPEDITIONARY FORCE PSC BOX 20080 CAMP LEJEUNE, NC 28542-0080

> SSIC ORIG CODE DD Mmm YY

From: Commanding General, II Marine Expeditionary Brigade

To: Commandant of the Marine Corps

Via: Deputy Commandant for Manpower and Reserve Affairs (MMOA-1)

Subj: THE PREPARATION OF CORRESPONDENCE WILL CONFORM WITH INSTRUCTIONS

SET FORTH IN SECNAV M-5216.5.

Ref: (a) MCO 1001R.1K

Encl: (1) MCRAMM

- 1. Ensure that the "United States Marine Corps" in the letterhead is written in 12 point Arial font. The II MEB address should be in 6 or 8 point Arial font.
- 2. Subsequent pages will be numbered.
  - a. Sub paragraph...
    - (1) Sub, Sub-paragraph...
      - (a) Sub...
        - 1. Sub...
          - a. Sub...
- 3. Remember that the signature block begins on the fourth line down from the last line of text. The first initial of the signature block should be at the true center of the page.

I. M. RESPONSIBLE By direction

Copy to:

#### FRAG ORDERS

- 1. The Fragmentary Order, or "Frag Order" (FRAG-O), serves as an abbreviated form of an operation order (verbal, written or digital) usually issued on a day-to-day basis that eliminates the need for restating information contained in a basic operation order. The baseline order for II MEB will be XXXXX Plan. Instead of drafting Letters of Instruction (LOIs), FRAG-Os will address the applicable Operation outlined in the XXXXXX Plan. It may be issued in sections. It is issued after an operation order to change or modify that order or to execute a branch or sequel to that order. Also called FRAG order.
- 2. Figure 8 is the standardized format for the II MEB FRAG-O.
- 3. The FRAG-O will be prepared by the appropriate staff section and routed to the SWO for tracking number assignment and distribution.



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SSIC Sponsor Code (Date Signed)

BASE ORDER: II MEB XXXXXX Plan

FRAG ORDER # (to be issued by COPS SWO)

From: Originating Command (section)

To: Executing Command/Major Subordinate Unit (list all)

Subj: LETTER OF INSTRUCTION FORMAT (LOI) / FRAGMENTARY ORDER FORMAT

Ref: (a) FM-100 Staff Planning

Encl: (1) Example Execution Matrix

- 1.  $\underline{\text{Situation}}$ . This paragraph describes the purpose of the FRAG ORDER and must be the first paragraph.
- 2.  $\underline{\text{Mission}}$ . This paragraph outlines the 5 W's (who, what, where, when and why) of the task to be accomplished. Example: On order (O/O), or no later than (NLT), or be prepared to (BPT), who, what, where, when, and the why in order to do/accomplish the associated task from higher headquarters/commanding general.

## 3. Execution

- a. Commander's Intent and Concept of Operations
- (1) <u>Commander's Intent</u>. This section will be completed in purpose (why?), method (how?), and end state (disposition upon completion).
- (2) <u>Concept of Operations</u>. This is a sequential word picture depicting the actions and counteractions inherent to the execution of this order.
- b.  $\underline{\text{Tasks}}$ . This sub-paragraph includes the tasking statements for the main effort, supporting efforts, and reserve efforts. The tasking should identify which specific II MEB action is being supported. All tasks should be coupled with a purpose to facilitate mission command.

### c. Coordinating Instruction

- (1) Tasks Common to All.
- (2) Other relevant tasks.

### 4. Administration and Logistics

a. At a minimum, this paragraph will denote when the FRAG Order becomes effective, to include: how accountability will be addressed, any funding data,

cost estimates, and any equipment transfer requirements, if applicable.

b. When cancellation of an order, directive, or previous LOI is required, a "Cancellation" paragraph will be included in the Coordinating Instructions. A cancellation paragraph is required when canceling other directives and by higher authority regulation. When the "Coordinating Instruction" and "Mission" paragraphs are both used, the FRAG-O will have six paragraphs.

#### 5. Command and Control

- a. This paragraph will provide all applicable point of contact information and reporting instructions, to include the Action Officer responsible for the FRAG and any appropriate points of contact required to accomplish the mission.
- b. This paragraph will also provide, when applicable, an execution matrix (enclosure 1) with the reporting command, action required, and the information required by the reports to the SWO in order to facilitate execution tracking by I MEF and MSC SWOs. \*Note: To maintain situational awareness within the Command Element, execution of all tasks must be tracked by the SWO through the use of a well thought out execution matrices. Execution tracking updates should be briefed at the Operations and Intelligence briefs on a weekly basis.

# I. M. MARINE Appropriate Billet

\*Note: Signatures cannot be delegated to process owners or officers serving as the "acting" staff member.

# Enclosure (1): Sample Execution Matrix

#	EVENT/SITUATION	FROM - TO  *Explain which section/unit is responsible for reporting execution and who should receive the report	EST. EXECUTE TIME	ACTUAL TIME OF EXECUTION	REMARKS
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

\*Note: Pro-words/brevity codes will be established at the unit level