

Summary Report for Individual Task  
150-MC-5011  
Prepare a Staff Study  
Status: Approved

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**Distribution Restriction:** Approved for public release; distribution is unlimited.

**Destruction Notice:** None

**Foreign Disclosure: FD6** - This product/publication has been reviewed by the product developers in coordination with the Fort Leavenworth, KS foreign disclosure authority. This product is releasable to students from foreign countries on a case-by-case basis.

**Condition:** The staff officer prepares a staff study in order to support the decisionmakers request for action on a recommendation. The staff officer includes all relevant information needed to solve the problem and provides a complete description of the methodology used to arrive at the recommended solution. The staff officer follows the seven-step Army problem-solving process that ensures the problem is clearly identified, is logically sequenced, and provides a justifiable solution. The staff officer receives and reviews all information/guidance provided by the decisionmaker, gathers information on the topic and coordinates with other organizations as needed during the preparation of the staff study Some iterations of this task should be performed in MOPP 4.

**Standard:** The staff officer prepares a staff study for the decisionmaker requesting action on a recommendation. The staff study follows the seven-step Army problem-solving process and, includes the information and methodology used to solve the problem. The staff study includes an official memorandum for the commanders signature that implements the action. The staff study is prepared using the Armys formal memorandum format or the organization own format. The staff officer lists all organizations with which the study was coordinated with and annotates whether they concur or nonconcur with the recommendation.

**Special Condition:** None

**Safety Risk:** Low

**MOPP 4:** Sometimes

<b>Task Statements</b>
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**Cue:** None

**DANGER**

Leaders have an inherent responsibility to conduct Risk Management to ensure the safety of all Soldiers and promote mission accomplishment.

**WARNING**

Risk Management is the Army's primary decision-making process to identify hazards, reduce risk, and prevent both accidental and tactical loss. All soldiers have the responsibility to learn and understand the risks associated with this task.

**CAUTION**

Identifying hazards and controlling risks across the full spectrum of Army functions, operations, and activities is the responsibility of all Soldiers.

**Remarks:** None

**Notes:** Note 1: The term "staff officer" refers to any individual member of a staff section (Officer, Warrant Officer, or Noncommissioned Officer) that is responsible for conducting the task action or generating the product required by the task in the absence of the principal staff officer.

Note 2: Task content last updated: 3 July 2014



## Performance Steps

Cue: The staff officer prepares the staff study, as a formal report to the decisionmaker, requesting action on a recommendation.

1. The staff officer includes the following actions when preparing the staff study:
  - a. Use the seven-step Army problem-solving process:
    - (1) Identify the problem.
    - (2) Gather information.
    - (3) Develop criteria.
    - (4) Generate possible solutions.
    - (5) Analyze possible solutions.
    - (6) Compare possible solutions.
    - (7) Make and implement the decision.
  - b. Provide a complete description of the methodology used to arrive at the recommended solution.
  - c. Prepare an official memorandum for the decision maker's signature that implements the action.
  - d. Coordinate with selected organizations, based on the following:
    - (1) Organizations that might be affected by the possible recommendation.
    - (2) Organizations that have expertise in the subject of the study.
  - e. Obtain concurrences or nonconcurrences from organizations affected by the study's recommendations and provide statements of nonconcurrence, if applicable.
2. The staff officer prepares the staff study as an informal memorandum using one of two formats:

Note: Use steps below use the staff study format found in ATTP 5-0.1, Command and Staff Officer Guide.

  - a. The staff study format found in AR 25-50, Preparing and Managing Correspondence or ATTP 5-0.1, Command and Staff Officer Guide.
  - b. The unit's own staff study format that meets local requirements.
3. The staff officer includes the following information in the memorandum's heading:
  - a. The staff officer's office symbol.
  - b. Date.
  - c. Memorandum For line - addresses the staff study to the decisionmaker and THRU addresses if required.

d. SUBJECT line - describe the subject.

4. The staff officer includes the following paragraphs in the body of the staff study:

a. Paragraph 1- PROBLEM:

(1) States the problem as an infinitive phrase or question; for example, "To determine..." or "How to..."

(2) Includes the who, what, when, and where if pertinent.

b. Paragraph 2 – RECOMENDATION: Recommends a solution or solutions to the problem based on the conclusion found in paragraph 10 (CONCLUSION) of the staff study.

c. Paragraph 3 – BACKGROUND:

(1) Briefly state why the problem exists.

(2) Provide enough information to place the problem in context.

(3) May include the origin of the action and a summary of related events.

(4) References the tasking document if it is the source of the problem, and places it in enclosure 2.

d. Paragraph 4 – FACTS:

(1) List each fact as a separate subparagraph.

(2) State all facts that influence the problem or its solution.

(a) Identify the facts.

Note: Facts must stand-alone: either something is a generally accepted fact or it is attributed to a source that asserts it to be true.

(b) Do not limit the number of facts, as long as every fact is relevant.

(c) Include all facts relevant to the problem, not just facts used to support the recommendation.

(d) Include any guidance given by the decisionmaker as a fact.

(e) Use annexes, as necessary to amplify, reference, include mathematical formulas, or tabular data.

e. Paragraph 5 – ASSUMPTIONS:

(1) List each assumption as a separate subparagraph.

(2) Identify assumptions that are necessary for a logical discussion of the problem.

f. Paragraph 6 – POSSIBLE SOLUTIONS:

(1) List all the solutions considered.

(2) List each solution as a separate subparagraph.

(3) List each of the solutions by using a number and name or as a short sentence in the imperative; for example, "Increase physical security measures at key assets".

(4) Include a brief description of the solution if it is not self-explanatory.

(5) Use enclosures to describe complex solutions.

g. Paragraph 7 – CRITERIA:

(1) Subparagraph 7a -Screening criteria (SC) are identified and used to define the minimum and maximum characteristics of the solution to the problem and require an absolute standard.

(a) Use to reject possible solutions that do not meet the absolute standard.

(b) Use one subparagraph for each SC.

(c) List and define each SC.

(d) Answer the following questions for each possible solution:

\_1\_ Suitable - Does it solve the problem and is it legal and ethical?

\_2\_ Feasible - Does it fit within available resources?

\_3\_ Acceptable - Is it worth the cost or risk?

\_4\_ Distinguishable - Does it differ significantly from other solutions?

\_5\_ Complete - Does it contain the critical aspects of solving the problem from start to finish?

(e) Do not apply weights to screening criteria.

(2) Subparagraph 7b - Evaluation criteria (EC) are identified and used to evaluate each possible solution not eliminated by screening criteria.

(a) Use one subparagraph for each EC.

(b) Define each EC in terms of:

\_1\_ Short title - the criterion name.

Definition - a clear description of the feature being evaluated.

Unit of measure - standard element used to quantify the EC, such as U.S. dollars, miles per gallon, or feet.

Benchmark - a value that defines the desired state or "good" for a solution in terms of a particular criterion.

Formula - an expression of how changes in the value of the criterion affect the desirability of the possible solution, stated in comparative terms (for example, less is better) or absolute terms (for example, a night movement is better than a day movement).

\_2\_ Definition - a clear description of the feature being evaluated.

\_3\_ Unit of measure - standard element used to quantify the EC, such as U.S. dollars, miles per gallon, or feet.

\_4\_ Benchmark - a value that defines the desired state or "good" for a solution in terms of a particular criterion.

\_5\_ Formula - an expression of how changes in the value of the criterion affect the desirability of the possible solution, stated in comparative terms (for example, less is better) or absolute terms (for example, a night movement is better than a day movement).

(3) Subparagraph 7c – Weight the EC.

(a) Determine the relative importance of each EC with respect to the others.

(b) Explains how each criterion compares to each of the other criteria and explain why the criterion is measured in that way:

\_1\_ Use measures of (equal, slightly favored, favored, or strongly favored).

\_2\_ Use values provided from the decision matrix, if used.

h. Paragraph 8 – ANALYSIS - lists the possible solutions that do not meet the SC and the results of applying the EC to the remaining solutions.

(1) Subparagraph 8a - identify the possible solutions that were screened out:

(a) List the possible solutions that did not meet the SC.

(b) Use one subparagraph for each possible solution that did not meet the SC.

(2) Subparagraph 8b – list the possible solutions that were analyzed using the EC.

(a) Use one subparagraph for each possible solution analyzed.

(b) Discuss the advantages and disadvantages of each solution.

(c) Use the raw data of the EC for quantitative criteria.

(d) Discuss or list advantages and disadvantages.

i. Paragraph 9 – COMPARISON - compare the courses of action to each other, based on the analysis outlined in paragraph 8 (ANAYSIS).

j. Paragraph 10 – CONCLUSION - state the conclusion drawn based on the analysis in paragraph 8 (ANALYSIS) and the comparison of the possible solutions in paragraph 9 (COMPARISON).

(1) Answers the question asked in the problem statement (paragraph 1) or provides a possible solution to the problem.

(2) Match the recommendation in paragraph 2.

k. Paragraph 11 – COORDINATION- list all organizations with which the study was coordinated.

(1) Use enclosure 3:

(a) Use if the staffing list was too long for paragraph 11.

(b) Enter "Not used" in the enclosure list of the body if paragraph 11 contains the entire staffing list.

(2) Include all statements of nonconcurrency and considerations of nonconcurrency here or in separate enclosures for each nonconcurrency.

(3) Include concurrences with comment here or in a separate enclosure or enclosures.

I. Paragraph 12 – APPROVAL OR DISAPPROVAL LINE:

(1) Restate the recommendation from paragraph 2.

(2) Provide a format for the approval authority to approve or disapprove the recommendation.

m. Paragraph 13- POINT OF CONTACT- Identify the point of contact (or action officer) and contact information, such as:

(1) Staff Officers organization.

(2) Telephone number.

(3) Unit address.

(4) E-mail address.

n. The staff officer includes the following information in the memorandum's ending:

(1) The staff officer's signature block.

(2) At least four enclosures:

(a) Enclosure 1 - contains implementing memoranda, such as:

\_1\_ Directives.

\_2\_ Letters submitted for signature or approval.

\_3\_ The documents required to implement the decision.

(b) Enclosure 2 - contains a memorandum for record if the requirement was given verbally, if no record exist enter "Not used" in the annex list in the body.

(c) Enclosure 3- contains the staffing list if the list is too long for paragraph 11, if paragraph 11 contains the entire staffing list, enter "Not used" in the enclosure list in the body.

(d) Enclosure 4 - contains statements of nonconcurrency and considerations of nonconcurrency. Other enclosures - may include detailed data, lengthy discussions, or bibliographies.

(Asterisks indicates a leader performance step.)



**Evaluation Guidance:** Score the Soldier: GO if all performance measures are passed. Score the Soldier NO-GO if Soldier fails any performance measure. If the Soldier scores NO-GO, show the Soldier what was done wrong and how to do it correctly.

**Evaluation Preparation:** Brief the Soldier: Tell the Soldier what is expected of him by reviewing the task standards. Stress to the Soldier the importance of observing all cautions and warnings to avoid injury to personnel and, if applicable, damage to equipment.

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. The staff officer included the following actions when preparing the staff study:			
<b>Note :</b> The staff officer prepares the staff study, as a formal report to the decisionmaker, requesting action on a recommendation.			
a. Used the seven-step Army problem-solving process:			
(1) Identified the problem.			
(2) Gathered information.			
(3) Developed criteria.			
(4) Generated possible solutions.			
(5) Analyzed possible solutions.			
(6) Compared possible solutions.			
(7) Made and implemented the decision.			
b. Provided a complete description of the methodology used to arrive at the recommended solution.			
c. Prepared an official memorandum for the decision maker's signature that implemented the action.			
d. Coordinated with selected organizations, based on the following:			
(1) Organizations that might be affected by the possible recommendation.			
(2) Organizations that have expertise in the subject of the study.			
e. Obtained concurrences or nonconcurrences from organizations affected by the study's recommendations and provided statements of nonconcurrence, if applicable.			
2. The staff officer prepared the staff study as an informal memorandum using one of two formats:			
<b>Note :</b> The steps below use the staff study format found in ATTP 5-0.1, Command and Staff Officer Guide.			
a. The staff study format found in AR 25-50, Preparing and Managing Correspondence or ATTP 5-0.1, Command and Staff Officer Guide.			
b. The unit's own staff study format that meets local requirements.			
3. The staff officer included the following information in the memorandum's heading:			
a. The staff officer's office symbol.			
b. Date.			
c. Memorandum For line - addresses the staff study to the decisionmaker and THRU addresses if required.			
d. SUBJECT line - describe the subject.			
4. The staff officer included the following paragraphs in the body of the staff study:			
a. Paragraph 1- PROBLEM:			
(1) Stated the problem as an infinitive phrase or question; for example, "To determine..." or "How to..."			
(2) Includes the who, what, when, and where if pertinent.			
b. Paragraph 2 – RECOMENDATION: Recommended a solution or solutions to the problem based on the conclusion found in paragraph 10 (CONCLUSION) of the staff study.			
c. Paragraph 3 – BACKGROUND:			
(1) Briefly stated why the problem exists.			
(2) Provided enough information to place the problem in context.			
(3) May include the origin of the action and a summary of related events.			
(4) Referenced the tasking document if it was the source of the problem, and places it in enclosure 2.			
d. Paragraph 4 – FACTS:			
(1) Listed each fact as a separate subparagraph.			
(2) Stated all facts that influenced the problem or its solution.			
(a) Identify the facts.			
(b) Did not limit the number of facts, as long as every fact was relevant.			

(c) Included all facts relevant to the problem, not just facts used to support the recommendation.			
(d) Included any guidance given by the decisionmaker as a fact.			
(e) Used annexes, as necessary to amplify, reference, included mathematical formulas, or tabular data.			
e. Paragraph 5 – ASSUMPTIONS:			
(1) Listed each assumption as a separate subparagraph.			
(2) Identified assumptions that were necessary for a logical discussion of the problem.			
f. Paragraph 6 – POSSIBLE SOLUTIONS:			
(1) Listed all the solutions considered.			
(2) Listed each solution as a separate subparagraph.			
(3) Listed each of the solutions by using a number and name or as a short sentence in the imperative; for example, “Increase physical security measures at key assets”.			
(4) Included a brief description of the solution if it is not self-explanatory.			
(5) Used enclosures to describe complex solutions.			
g. Paragraph 7 – CRITERIA:			
(1) Subparagraph 7a -Screening criteria (SC) are identified and used to define the minimum and maximum characteristics of the solution to the problem and require an absolute standard.			
(a) Used to reject possible solutions that did not meet the absolute standard.			
(b) Used one subparagraph for each SC.			
(c) Listed and defined each SC.			
(d) Answered the following questions for each possible solution:			
_1_ Suitable - Did it solve the problem and is it legal and ethical?			
_2_ Feasible - Did it fit within available resources?			
_3_ Acceptable - Was it worth the cost or risk?			
_4_ Distinguishable - Did it differ significantly from other solutions?			
_5_ Complete - Did it contain the critical aspects of solving the problem from start to finish?			
(e) Did not apply weights to screening criteria.			
(2) Subparagraph 7b - Evaluation criteria (EC) were identified and used to evaluate each possible solution not eliminated by screening criteria.			
(a) Used one subparagraph for each EC.			
(b) Defined each EC in terms of:			
_1_ Short title - the criterion name.			
_2_ Definition - a clear description of the feature being evaluated.			
_3_ Unit of measure - standard element used to quantify the EC, such as U.S. dollars, miles per gallon, or feet.			
_4_ Benchmark - a value that defines the desired state or “good” for a solution in terms of a particular criterion.			
_5_ Formula - an expression of how changes in the value of the criterion affect the desirability of the possible solution, stated in comparative terms (for example, less is better) or absolute terms (for example, a night movement is better than a day movement).			
(3) Subparagraph 7c – Weight the EC.			
(a) Determined the relative importance of each EC with respect to the others.			
(b) Explained how each criterion compared to each of the other criteria and explained why the criterion was measured in that way:			
_1_ Used measures of (equal, slightly favored, favored, or strongly favored).			
_2_ Used values provided from the decision matrix, if used.			

h. Paragraph 8 – ANALYSIS - listed the possible solutions that did not meet the SC and the results of applying the EC to the remaining solutions.			
(1) Subparagraph 8a - identified the possible solutions that were screened out:			
(a) Listed the possible solutions that did not meet the SC.			
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(2) Subparagraph 8b – listed the possible solutions that were analyzed using the EC.			
(a) Used one subparagraph for each possible solution analyzed.			
(b) Discussed the advantages and disadvantages of each solution.			
(c) Used the raw data of the EC for quantitative criteria.			
(d) Discussed or listed advantages and disadvantages.			
i. Paragraph 9 – COMPARISON - compared the courses of action to each other, based on the analysis outlined in paragraph 8 (ANAYSIS).			
j. Paragraph 10 – CONCLUSION - stated the conclusion drawn based on the analysis in paragraph 8 (ANALYSIS) and the comparison of the possible solutions in paragraph 9 (COMPARISON).			
(1) Answered the question asked in the problem statement (paragraph 1) or provided a possible solution to the problem.			
(2) Matched the recommendation in paragraph 2.			
k. Paragraph 11 – COORDINATION- listed all organizations with which the study was coordinated.			
(1) Use enclosure 3:			
(a) Used if the staffing list was too long for paragraph 11.			
(b) Entered “Not used” in the enclosure list of the body if paragraph 11 contained the entire staffing list.			
(2) Included all statements of nonconcurrence and considerations of nonconcurrence here or in separate enclosures for each nonconcurrence.			
(3) Included concurrences with comment here or in a separate enclosure or enclosures.			
l. Paragraph 12 – APPROVAL OR DISAPPROVAL LINE:			
(1) Restated the recommendation from paragraph 2.			
(2) Provided a format for the approval authority to approve or disapprove the recommendation.			
m. Paragraph 13- POINT OF CONTACT- Identified the point of contact (or action officer) and contact information, such as:			
(1) Staff Officers organization.			
(2) Telephone number.			
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n. The staff officer included the following information in the memorandum’s ending:			
(1) The staff officer’s signature block.			
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(a) Enclosure 1 - contained implementing memoranda, such as:			
_1_ Directives.			
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(d) Enclosure 4 - contained statements of nonconcurrency and considerations of nonconcurrency.			
(e) Other enclosures - may include detailed data, lengthy discussions, or bibliographies.			

**Supporting Reference(s):**

Step Number	Reference ID	Reference Name	Required	Primary
	ADRP 3-0	Unified Land Operations	Yes	No
	ADRP 5-0	The Operations Process	Yes	No
	ADRP 6-0 (Change 002, March 28, 2014)	Mission Command <a href="http://armypubs.army.mil/doctrine/DR_pubs/dr_a/pdf/adrp6_0_new.pdf">http://armypubs.army.mil/doctrine/DR_pubs/dr_a/pdf/adrp6_0_new.pdf</a>	Yes	No
	FM 6-0	COMMANDER AND STAFF ORGANIZATION AND OPERATIONS	Yes	Yes

**Environment:** Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT. .

**Safety:** In a training environment, leaders must perform a risk assessment in accordance with ATP 5-19, Risk Management. Leaders will complete the current Deliberate Risk Assessment Worksheet in accordance with the TRADOC Safety Officer during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination. .

**Prerequisite Individual Tasks :** None

**Supporting Individual Tasks :** None

**Supported Individual Tasks :**

Task Number	Title	Proponent	Status
150-MC-0000	Organize the Staff as the CoS/XO/DCO at Battalion to Corps Level	150 - Combined Arms (Individual)	Approved

**Supported Collective Tasks :**

Task Number	Title	Proponent	Status
71-8-2440	Provide Intelligence Support to Counterinsurgency (Battalion - Corps)	71 - Combined Arms (Collective)	Approved