

Insights and Best Practices

Focus Paper



Chief of Staff (COS) Roles and Functions at Joint Headquarters

Second Edition

**Deployable Training Division
Joint Staff J7**

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Approved for public release

This is the Second Edition of the Insights and Best Practices Focus Paper on Chief of Staff (COS) roles and functions at joint headquarters. It is written by the Deployable Training Division (DTD) of the Joint Staff J7 and released by the J7 Deputy Director for Joint Training.

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Scope of paper:

- Relevant to Combatant Command HQs, Subunified Command HQs, Joint Functional Component HQs, and JTF HQs.
- Highlights importance of the COS position and talent management / selection implications.
- Addresses COS leadership and coaching roles, and details the COS staff integration and synchronization role in supporting the commander's decision-making process.
- Addresses key functions associated with identifying, monitoring, and managing gaps, seams, complexity, and transitions across planning time horizons and staff directorates, and responsibilities for development and discipline of the battle rhythm and information sharing.
- Describes and shares an extract of a terms of reference document depicting joint commander direction on COS and Deputy Commander roles and duties.

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Related Insights and Best Practices focus papers: Recommend the following focus papers for more in depth coverage: Mission Command, Joint HQ organization, staff integration, and battle rhythm, CCIR, and Joint HQ Terms of Reference. These and other DTD focus papers are accessible at the websites below.

Terminology and Acronyms: Numerous military acronyms and organizational names are used in this paper. They are defined in the glossary to increase readability in the body of the paper for the intended readership. Recommend review of the C2 discussions in Joint Publication 1 and 3-0.

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Accessibility: This and other insight and best practice papers can be accessed on the internet at the Joint Electronic Library site: http://www.jcs.mil/Doctrine/focus_papers.aspx.

Disclaimer: The views in this paper are those of the author and do not necessarily reflect the official policy or position of the Joint Staff, the Department of Defense (DOD), or the United States Government (USG).

Releasability: Approved for public release

PREFACE

This paper shares insights and best practices related to the roles of a joint headquarters Chief of Staff (COS) – our only paper focused on a single position. We pull these insights directly from the joint forces executing operations.

This paper may be beneficial to three main audiences:

- Commanders in providing guidance to the Chief of Staff on roles and responsibilities.
- Chiefs of Staff as they take on this duty in a joint and multinational environment.
- Staff as they look to the COS as a leader and staff synchronizer.

We solicited and gained the insights and perspectives of many current and former commanders and chiefs of staff at both the Combatant Command and Joint Task Force level. **Their points of emphasis were:**

- The critical importance of a close Commander – Chief of Staff relationship within the HQ. The COS leads and synchronizes the staff, and enables the Commander to focus on command, providing guidance and intent, and developing and deepening trust-based relationships with higher HQs, subordinates, and partners.
- The value of a terms of reference document clarifying roles and responsibilities of the key leaders and staff.
- The COS is responsible for the battle rhythm and staff integration.

“I wish this paper had been around about ten years ago. It is long overdue and addresses a job often left shrouded in mystery, one to be worked out by a new Chief and/or a new Commander without the benefit of developed best practices.”
- Combatant Commander

This and other focus papers summarize observations and insights on joint force HQs shared by the Joint Staff J7 Deployable Training Division. The DTD gains insights on operational matters through regular contact and dialogue with CCMD and operational level commanders and staffs as they plan, prepare for, and conduct operations and exercises. They incorporate these insights in functionally-based focus papers, refine them through senior flag officer feedback, and then share them with the operational force, and joint lessons learned and joint doctrine communities. Four related focus papers to this paper are Geographic Combatant Command C2 Organizational Options, Mission Command, Forming a JTF HQ, and Joint HQ’s Terms of Reference. These papers are found on the site noted on the inside front cover.

Please share your thoughts, solutions, and best practices to DTD’s POC, Mr. Mike Findlay, as you think, plan, and work your way through these challenges.



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1.0 EXECUTIVE SUMMARY. Today’s uncertain environment with the increased potential (and reality) for a “fight tonight” has dramatically changed the nature of combatant command, component, and even JTF HQs. These HQs have by necessity increased their agility and bias for action to act at the speed of the many ongoing challenges.

“The COS is the commander’s most valuable player. He or she must have the right instincts and background, and accept being an inch deep and a mile wide.”

- Combatant Commander

The role of the COS has also ***changed to being a hands-on, tuned-in leader and synchronizer*** of a complex HQ that supports not only the commander’s decision requirements, but also subordinate operational mission requirements, mission partners, and higher headquarter’s information requests.

“The Chief is a coach, directing the staff in order for the force to achieve the highest level of battlefield harmony. Critical to taking advantage of fleeting opportunities.”

- Combatant Commander

The COS leads, coaches, and mentors the staff. The COS is the staff integrator and synchronizer to support the commander’s decision-making requirements. This

integration and synchronization is achieved through a deep understanding of the commander’s decision-making style and the development, management, and prioritization of staff processes and efforts. The COS is also normally empowered to make certain decisions to retain agility in decision making, such as in the areas of targeting and messaging.

“The staff must be able to operate under degraded communications or while its military planning and execution model is being “whipsawed” by newsworthy fact or fiction.”

- Combatant Commander

Challenges: Commanders and COS note the following common challenges.

- Ensuring common understanding within the staff on the roles and responsibilities of the key leaders within the HQ - both within the command group and across the staff - to prevent confusion, streamline operations, and improve overall effectiveness.
- The information environment. Today’s 24 hour news cycle and potential cyber intrusion challenges have the potential to disrupt efficient staff operations.
- Large HQs and complex processes that can impede operating at the speed of the challenge.
- The daily grind of staff churn that consumes a HQ. It is often difficult to find time to identify opportunities to streamline or eliminate unnecessary or redundant requirements / processes.
- HQs also get drawn into the close fight - current operations. It takes discipline to anticipate and proactively plan in the future plans and future operations arena. This includes prioritization and discipline of staff efforts across these three time horizons.
- OPTEMPO can hinder maintaining transparent and inclusive relationships with interagency and coalition partners, and between the “core” staff of the HQ and individual augmentees.
- Ensuring common understanding through knowledge and information management, and developing and maintaining an agile, adaptive battle rhythm that supports steady state and crisis requirements by the commander, mission partners, and higher decision makers.

Key Insights:

- Confer with the commander to discern his or her decision-making style and venues, and how you can enable the commander to focus on command, provide guidance and intent, and develop and deepen trust-based relationships with higher HQs, subordinates, and partners.
- Codify roles of key staff personnel in some form of a terms of reference document.
- Synchronize versus control staff efforts (in adherence to mission command precepts).
- Prioritize staff efforts to ensure they are supporting the most important tasks.
- Take the time to develop and manage the battle rhythm. Be flexible. Adapt to the situation.

2.0 ROLE. The COS has an important leadership, coaching, and synchronizing role for the staff as they support not only the commander’s decision requirements, but also subordinate operational mission requirements, mission partners, and higher headquarter information requests.

Chief of Staff (COS) Definition: The senior or principal member or head of a staff who acts as the controlling member of a staff for purposes of the coordination of its work or to exercise command in another’s name. - JP 1-02, Department of Defense Dictionary

Integrating and synchronizing the staff in support of the commander’s decision cycle consumes the bulk of the chief of staff’s time. This integration and synchronization must occur within a mission command framework of trust, shared understanding, and intent. It is accomplished through the establishment and management of staff processes and procedures (e.g., battle rhythm), understanding and management of staff capacity, setting priorities, and knowledge management.

“The chief of staff has a profoundly important role in leading and harmonizing the efforts toward a fully integrated, high performing staff - especially in emerging or evolving problem sets -- which are now the norm.” - Senior Flag Officer

“Terms of Reference is one of the, if not the most, important documents for a COS. It must clearly delineate duties and responsibilities given by the Commander to his command group and key staff members. The second most important document is the battle rhythm.” - JTF Commander

Insights:

- Confer with the commander to understand preferred decision-making styles and venues, and to clarify roles, authorities, and functions of the command group and key staff. See sections 4 and 5 for more on decision styles and how terms of reference documents can codify roles.
- Establish regular command group synchronization meetings with the commander, deputies, and COS to share guidance, decisions, feedback from circulation, and higher command direction. Several commanders recommend morning synchronization meetings.
- Understand and manage staff bandwidth (capacity) to support decision making.
- Set priorities to ensure the staff is supporting the most important tasks.
- Watch over and safeguard the staff. They will be confronted with numerous demands from the commander and deputies, from higher, adjacent, and subordinate mission partners, internal HQ staff coordination and estimate requirements, and difficult time suspenses. The COS is best situated to watch over their development, morale, and ensure their effectiveness.
- Establish and leverage a deputy chief of staff position (if needed) to assist in assigned duties. A DCOS can monitor and direct day to day workings of the staff enabling the COS to look outward at future and external requirements.
- Translate and ensure adherence to Service policies in the joint environment (e.g., personnel evaluations, rotations, etc.).

“I directed that my COS be “velcroed” to the HQ. He ran the staff...” - Combatant Commander

“I believe it is the job of the COS to synchronize people and processes versus integrate or coordinate people and processes. While that may seem like a semantic difference, I think synchronize better describes the COS role and places the COS in a complementary position instead of a competitive position vis-à-vis the rest of the staff.” - Combatant Commander

“The COS must ensure that he delegates ruthlessly otherwise he will soon be overwhelmed by all the staff work.” - Combined JTF COS

“The COS is ideally placed to establish what the Commander needs to know, when and in what form. He then directs the staff accordingly.” - Combined JTF COS

3.0 INTEGRATION AND SYNCHRONIZATION.

The COS integrates and synchronizes the staff across time, organization, and information and knowledge within a mission command philosophy based on trust, understanding, and intent.

“The COS provides a unique perspective on down and in activities and information flow, and is the key member to ensure commander’s intent is correctly understood and applied. The COS may be the only senior member to focus on the down and in activities while the commander and deputy are tied up with the up and out.”
- Combatant Commander

Time:

- Direct use of planning time event horizons (future plans, future operations, and current operations) to focus staff efforts and set conditions for subordinates.
 - Anticipate, monitor, identify, and mitigate gaps and seams between horizons.
 - Discipline the process to move between event horizons - require hand-off briefs.
 - Consider use of several smaller touch points with the commander versus large briefs. This often results in better sharing of understanding and more timely guidance.
 - Identify potential and emerging transitions and proactively focus staff efforts.
- Prioritize staff efforts to ensure they remain focused on the most important tasks.
 - *Nobody else on the staff can do this routinely except for the chief of staff.*
 - Staff members generally focus primarily on their “lane” / function; the chief of staff looks across and integrates “lanes” and functions. Routinely swivel back and forth between telescope mode (mid- and long-term) and microscope mode (current).
 - Incorporate some form of weekly staff-wide planning management / prioritization venue.
 - Personally manage battle rhythm acceleration to support dynamic tasking and decision requirements. Only the COS can anticipate associated 2nd and 3rd order effects / friction.
 - Assign staff lead and support for problem sets / tasks to appropriate staff directorates / sections and / or planning horizon.
- “Past ops” (such as investigations) can often consume the chief of staff. Identify the process and means to perform these. Anticipate associated time requirements. Recognize the value of bringing in external support to accomplish some of these.

Organization:

- HQ size. Recognize your unique role in limiting the common propensity to grow the HQ.
- Internal organization.
 - Clarify and codify staff responsibilities up-front for assessment, messaging, engagement, integration of lethal and nonlethal activities, and knowledge management.
 - Manage development, approval, and sourcing of the Joint Manning Document.
 - Ruthlessly review staff organization for redundancies and inefficiencies.
- Cross-staff coordination.
 - Monitor / manage cross-staff coordination / interaction. (See section 6 - battle rhythm)
 - Physically locate / ensure connectivity between staff sections for critical interaction.
- External interaction.
 - Assess interaction requirements and persistency of interaction with external organizations (within DoD, USG interagency, multinational, intergovernmental).

“Strategic messaging / communication is a function that can be hard to pin down, assign ownership to, and place in a battle rhythm. There are numerous messaging stakeholders within a staff but a COS must assign responsibility to one directorate and rely on that directorate to gather information in order to present a fully staffed course of action / product.”
- Combatant Command COS

- Determine means for interaction such as sending or receiving LNOs, routine VTCs, meetings, inclusion in specific battle rhythm events.
- Determine need and provide LNOs to external organizations (to include multinational organizations and partners). Manage their reporting requirements, force protection requirements, care and feeding, authorities, C4I systems, etc.
- Plan for reception, integration, use, and oversight of external LNOs to your HQ. Their role and value is often under-recognized and not fully leveraged.
- Transparency between HQ staffs engenders an environment of trust and understanding. Reach out to subordinate staffs via assistance visits and simple staff-to-staff visits to promote greater situational awareness and camaraderie among organizations.

"Outliers to a core staff must be organized and integrated into the HQs. Exchange Officers, LNOs, and interagency partners play critically important roles in the functioning of the strategic headquarters. If these personnel / functions are not integrated properly into the staff, and venues are not present to facilitate their sharing of information into plans and operations we lose valuable decision space for the commander. Admin care and feeding of these personnel cannot be overlooked."

- Combatant Command COS

Information and Knowledge:

- Develop, manage, and when necessary, adjust calendars and battle rhythm (see section 6).
 - Recognize and incorporate implications of manning, information management, physical security, HQ configuration, networks, and assignment of staff and / or LNO responsibilities to participate in higher HQ / external battle rhythm events, and required reports / products.
 - Command group calendars.
 - Identify and manage protocol for on-call and urgent inputs to Commander.
 - Routinely review and synchronize command group schedules.
- Knowledge and information management.
 - Identify and enforce requirements and processes for knowledge management and information sharing.
 - Recognize the likelihood and understand the opportunities and implications of sharing information - both with USG interagency partners, but also with potential alliance and coalition members. This will require up-front command-level decisions within a properly balanced need-to-share and need-to-know construct. Sharing of information may require a mission partner environment network (a federation of independent, partner networks) such as the well known Afghanistan Mission Network together with well-defined information management decisions.
- Require post meeting minutes (PMM) for all battle rhythm events. Develop processes to quickly develop, approve, and share PMM. Post PMM on the HQ portal for wide access.
- Assign RFI management and staff tasker tracking responsibilities across the staff.

"Information management is critical but knowledge management is perhaps more critical on a staff. A CCMD HQs deals with a huge amount of data on a daily basis and it is the COS' responsibility to ensure effective mechanisms are in place to turn data into knowledge. The battle rhythm is a great place to turn data into knowledge, package that knowledge, and present a quality product to decision makers."

- Combatant Command COS

"The COS is often the HQ's conscience in regard to enabling multinationality, joint, and / or interagency cooperation."

- Combined JTF COS

Insights and Best Practices:

- Retain the coach, mentor, and leader mindset while performing the staff synchronizer role.
- Instill a planning time event horizon mentality to focus staff and better set conditions for subordinates. Consider chairing a weekly or biweekly planning management board to prioritize planning efforts across all time horizons.
- Clarify empowerment for specific decision authorities and staff integration (particularly where the COS and some J-directors are of equal rank).
- Maintain a close relationship with Commander's Executive Assistant and Initiatives / Action Groups, and other members of the personal and special staff to enrich understanding and manage staff tasking and priorities of work.
- Keep the size of the staff to the minimum size consistent with the mission. Larger is not always better. This has significant agility, speed, focus, and quality of decision support implications.
- Spend time up-front clarifying staff responsibilities for HQ functions (particularly assessment, integration of lethal and nonlethal fires/effects, and messaging).
- Balance HQ manning with regard to numbers, experience, influence of position, and rank. Structure the staff commensurate with the composition of forces and the character of the contemplated operations to ensure that the staff understands the capabilities, needs, and limitations of each element of the force.
- Think through where to place oversight of both knowledge and information management (KM / IM) to ensure efficient and effective information sharing. Strongly consider maintaining oversight of KM as it supports decision processes.

"The COS should develop a good working relationship with the other chiefs and deputies (up, down and sideways) to gauge how his own HQ is delivering their output and also facilitate the staffing of issues (particularly if there are difficulties) so that a solution can be agreed upon or options provided to the Commander." - Combined JTF COS

"Large HQs by their very nature, often take on unnecessary functions, require more internal coordination, and have the potential to overwhelm mission partners with demands and information, all of which can slow and / or reduce focus on providing agile and optimal support to commander decision making requirements." - Combatant Commander

"The COS bears responsibility for the battle rhythm construct. It is a daily topic of discussion within my office as we refine the process to better support the commander's decision making process. There is a distinct difference in the quality of products that have been through the battle rhythm process and those that haven't. Decisions will get made either way but the speed of the decision making is greatly improved if a product has been staffed through battle rhythm channels." - Combatant Command COS

"Integration, Battle Rhythm, planning horizons, and KM / IM must be nested with all teams – higher, adjacent, and subordinate (military), as well as supported and supporting (lead federal agency and other government agencies). This is especially important when one or more of the relationships is not a formal command relationship."

- JTF Commander

4.0 ALIGNMENT WITH THE COMMANDER’S DECISION-MAKING STYLE. High performing organizations understand and conform to their commander’s decision making style.

We’ve found that the following style topics provide a construct by which to discern commanders’ preferences. (see figure – some implications are italicized):

“The Commander will indicate how he wants to provide direction and guidance (small groups, drive-bys, all informed staff briefings, etc.). However the COS can shape the process, as he must ensure that those who need to be informed are kept informed in order to keep the HQ performing effectively.” - Combined JTF COS

Insights and Best Practices:

- Take time early on to confer and gain commander’s guidance on decision style preferences to enrich your direction to the staff in how to optimally interact and share information with the commander.
- Incorporate commander’s interaction guidance in development of the battle rhythm, particularly in terms of touchpoints and decision forums (normally COS-led).
- Incorporate commander’s guidance in personnel utilization to craft terms of reference documents (see section 5).
- Clarify roles, disposition, and interaction with both organic and external LNOs.
- Develop and maintain decision approval matrices (normally delegated to J-3 lead).
- Develop methods to capture, readback, and disseminate commander’s guidance and decisions. Systematic sharing of commander guidance and decisions are problematic across the force.

The staff exists to support the Commander’s decision making requirements

Share style with staff and commanders

Interaction Styles

- *Some use small groups, others large groups to receive, deliberate on, and make decisions* (information sharing and battle rhythm implications)
- *Different preferred means for interaction with staff and with subordinates, e.g., one on one, through COS, VTC, or in person* (battle rhythm implications)

Personnel Utilization Styles

- *Different views on use of CSEL, Deputies, COS, J-Dirs, and Special Staff* (Terms of Reference implications)
- *Different use / role of liaison elements* (information sharing and staff implications)
- *Different empowerment approaches inside HQ and with subordinates* (Clear and understood decision approval matrices implications)

Information Sharing / Visualization Styles

- *Dialogue techniques with HHQ – to inform and be informed* (Staff support requirements, BR anchor points, Sharing venue implications)
- *Different information requirements and preferred ways to receive information* (CCIR, reporting, and briefing implications – use of graphics / words implications)

“So, my great decentralization and empowerment plan only spanned one echelon, from me to the COS!!”
[Ensure you understand and comply with the commander’s philosophy.]
 - Combatant Commander

“The COS must ensure that the staff present information in the form that best suits the Commander. It must be uniform (font, style, color, etc) so the commander can concentrate on the subject and not be irritated or distracted by the delivery.”
 - CJTF CDR

“Establishing routine vector checks / touch points with the commander is absolutely essential and great effort must be made to plug the boss into the right spots on the battle rhythm for him to give guidance and direction. Get the commander into the decision making process as early as possible to give course correction and avoid wasted effort.”
 - Combatant Command COS

“The commander told me he hired me, not because of my tactical acumen, but because I took care of people. He said he needed me to care for and take care of his staff.”
 - JTF COS

5.0 USE OF TERMS OF REFERENCE (TOR) DOCUMENTS. Numerous commands describe or direct COS duties and the roles, duties, and responsibilities of the deputy commander(s) in terms of references or command directives. This section shares an example of these directives.

The example below is just that – an example. Every TOR or directive is personalized to the commander’s preferences.

“Ideally the COS is 'first among equals' amongst the other officers of the same rank within the HQ. This empowers the COS and helps in the smooth and efficient running of the HQ. The Commander, however, is key, he must make it clear to the officers and HQ, if he wants to empower his COS in this way.”

- Combined JTF COS

A Two –star JTF TOR example (partial extract):

The primary role of the deputy commanders is to assist in exercising my command responsibilities. They are my principal advisors on all command matters, and are authorized to give orders, direction, and guidance that have the same force, effect, and authority as those given by me. Although specific responsibilities are assigned to each deputy, they have full authority to execute policies across the JOA. The deputies will make routine decisions and take direct action consistent with my guidance and intent.

The COS is my primary staff synchronizing agent for all activities. The COS ensures that all warfighting functions are synchronized across each of the Lines of Operation in order to achieve the desired

“One of my biggest roles was ensuring common direction for the staff – working with the commander and his deputies to clarify deputy commander involvement and authorities in regard to staff direction, steering, and decisions.”

- Combatant Command COS

end state. Acts as principal agent for the commander for the coordination and approval of command policies, plans, orders, instructions, and procedures. Is the principal staff synchronizing agent in support of the commander and deputies. Informs and advises appropriate staffs, commands and agencies of the commander’s intent, guidance, and policies. Receives the commander's decisions and directives and ensures timely implementation. Acts as the focal point and clearinghouse for all information and communications. Keeps information flowing, provides feedback to the commander, and ensures the staff conducts long-range planning. Is authorized to act / make decisions in my absence. Supervises and synchronizes the general and special staff, secretary of the combined joint staff, joint visitors bureau and headquarters commandant.

Insights and Best Practices:

- Develop a TOR or Directive in accordance with commander’s guidance and deputy commander’s input to delineate roles and responsibilities of the command group and key staff.
- Fix responsibility for staff training – predeployment, reception, continuous sustainment training.

“Staff Training and Development. Most staffs will have to start at battle rhythm and work their way down through KM/IM. If they are not trained and do not understand why the systems function, the organization will not reach optimal proficiency. This requires continuous COS oversight since service members, as well as LNOs from OGAs, NGOs, etc., rotate on a different deployment / redeployment schedule. We conduct staff training while deployed, just like we do in garrison. This is a key COS responsibility.”

- JTF Commander

6.0 BATTLE RHYTHM DEVELOPMENT.

The battle rhythm focuses staff effort in support of decision making, guards the time of the commander and staff personnel, and procedurally includes mission partners in HQ activities. The battle rhythm must not only support decisions across the three event horizons, but also account for the battle rhythms of higher and adjacent mission partners, all while enabling timely direction and guidance to subordinate units. The logical arrangement of OPTs and B2C2WGs in support of each other and commander decision making is the mark of an effective and efficient HQ.

“Integrating a staff via the battle rhythm process cannot be overstated and must remain a core tenet of this document.” - Combatant Command COS

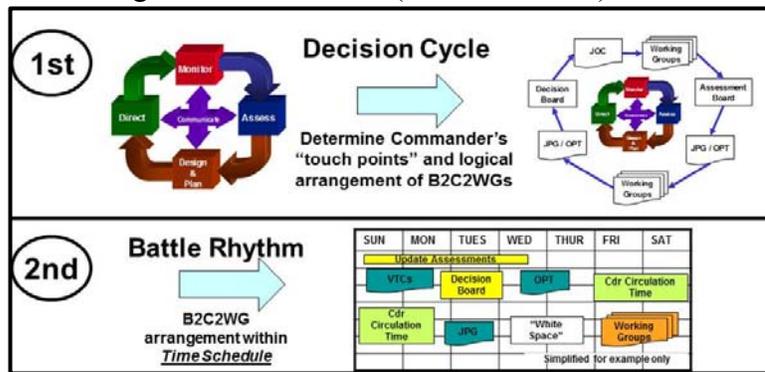
Challenges:

- Development of a new battle rhythm for forming HQs.
- Flexibility: having the ability to adjust the battle rhythm as needed. Not being able to flex can be as harmful as not having a battle rhythm.
- Refinement of the battle rhythm based on changing decision making requirements or external (HHQ) requirements while maintaining thinking / reflection time.
- Adapting a steady state battle rhythm during transition to crisis (at CCMD level).

“It is quite easy for a HQ to be consumed by its own battle rhythm and be extremely busy but self consumed and not delivering the output it should. The COS must constantly check the outputs and also the time the branch chiefs or command group are consumed by meetings without the opportunity to give direction and guidance.” - Combined JTF COS

Basic precepts:

- Understanding the commander’s “touch point” requirements and preferences, and necessary “anchor points” with other HQs (e.g., a SecDef SVTC) begins the process of creating an effective battle rhythm.
- Thorough TORs result in responsibility and authority portfolios for the deputy commanders. These will affect the battle rhythm. Not all decisions need to go all the way up to the commander. This can free white space and increase speed and agility in the HQ.
- Building upon the foundation of commander’s touch points and required anchor points, the battle rhythm can be created in two distinct steps. The first step is to start with a logical arrangement of OPTs and B2C2WGs around the commander’s decision requirements with decision venues (boards) as culminating events. We have observed many HQs successfully use a “critical path or information flow” construct to map inputs to and outputs from the OPTs and B2C2WGs to focus this effort. The second step lays out these events on a calendar or time schedule as depicted above.



Techniques:

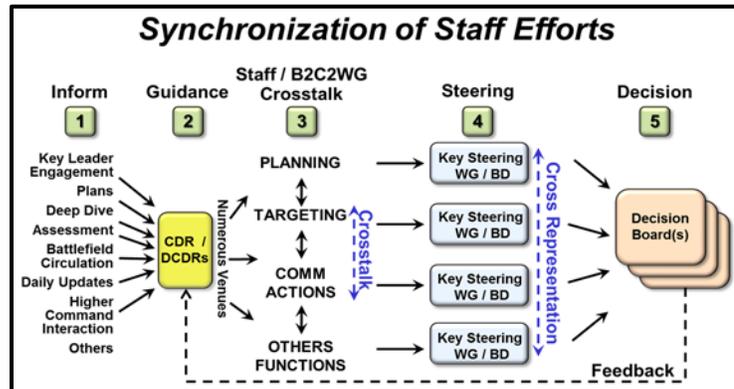
- Mapping logical arrangement of events. We’ve seen two techniques; either can work. One, used by the Joint Enabling Capabilities Command (JECC) is complete mapping of every BR event into a comprehensive information flow diagram coupled with staff utilization and time synchronization matrices. This takes time to build, is largely based on existing SOPs, drills, and while it may initially be overwhelming to a decision maker, has clear benefit in its

thoroughness. This is a product sought after by numerous joint headquarters. Another technique, one used

“Synchronization and Integrating Systems: Plans, FUOPS, Targeting, and CUOPS. Each requires a deliberate System, SOP, and TTP to ensure the CDR receives all decision-making support and to ensure optimal effectiveness of the organization.” - JTF Commander

by the DTD and transferable to a HQ, is development of several discrete information flow or critical path charts for each of the functional areas / systems (e.g., assessment, planning, intelligence, sustainment) laying out how they inform, receive guidance, coordinate, and gain decisions in their specific area. These are developed by the respective J-Director staff responsible for the function. These discrete system flow charts are then overlaid, identifying necessary staff crosstalk and representation, and logical interaction with decision makers in steering and / or decision venues (see below figure).

- Use of a battle rhythm event charter (aka 7 minute drill) to develop and vet battle rhythm events. The charter is typically developed by the responsible J-Dir and vetted with the COS (for cross-staff integration). Vetting helps ensure every event on the battle rhythm has a necessary



purpose, defined inputs and outputs, and necessary cross-staff linkages. An event that has no discernible output, doesn't assist in supporting future decisions, and / or consumes precious staff or commander time should not be part of the battle rhythm.

- Arrangement in a battle rhythm. Build the battle rhythm as a structure and foundation for staff support to decision making and interaction with mission partners. Recognize that certain events will have different frequency of occurrence – often based on whether they are future plans, future operations, or current operations focused. Their frequency may also change based on the situation – steady state vs crisis. Some battle rhythm events may focus solely on a crisis, others on steady-state, and others may include information or decision requirements for both. Nest the battle rhythm with other HQ -- HHQ, adjacent HQ, and subordinates.
- We find that the most effective battle rhythms have dedicated time periods for staff interaction with the commander, for battlefield circulation, and for reflection and staff work; this provides predictability. For example, we've seen some operational HQs block a morning time period for touch points with the command group, a time period mid-day for staff work, another period for cross-functional staff meetings, and another block in the evening for scheduled or on-call meetings with the commander, while accounting for battlefield circulation, meals, rest, and personal time.

Insights and Best Practices:

- Take charge of the battle rhythm. Don't delegate this important function. Routinely assess information flow and identify opportunities to streamline or eliminate unnecessary or redundant requirements and processes.
- Fix accountability on J-directors for developing effective critical path / information flow with clear inputs and outputs for their respective functions and supporting battle rhythm events.
- Constantly check battle rhythm event outputs and the time the branch chiefs or the command group are consumed by meetings without the opportunity to reflect and provide guidance.

7.0 JOINT DOCTRINAL EXTRACTS.

Duties of a JTF Chief of Staff – Source is Joint Publication 3-33 (Joint Task Force HQ):

The chief of staff is the key joint task force (JTF) staff integrator. This is accomplished through the establishment and management of staff processes and procedures that support the command's decision-making process. Duties may include (but are not limited to):

- Coordinating and directing the staff directorates' work.
- Supervising the preparation of staff estimates, plans, and orders.
- If directed by the commander, coordinating and maintaining the battle rhythm becomes one of the chief of staff's primary responsibilities. This includes establishing and monitoring the joint task force (JTF) battle rhythm to ensure that it effectively supports JTF planning, decision making, and other critical functions.
- Managing the process for creating a shared learning environment through the combination of information management (IM), knowledge sharing, and collaboration.
- Representing the commander when authorized.
- Implementing policies as directed by the commander.
- Formulating and disseminating staff policies.
- Ensuring effective liaison is established with the joint force's higher and subordinate headquarters (HQ), adjacent HQ, and with other critical agencies and organizations in the operational area.
- Supervising sustainment of the joint staff and its headquarters (HQ) and facilities.
- Supervising staff training and integration programs.
- Supervising the development and implementation of the joint manning document (JMD).
- Works with superior headquarters (HQ) and Service components to provide required personnel and identify and requisition critical shortfalls.

Glossary

Definitions, Abbreviations, and Acronyms

<p>Knowledge Management (KM): An organization's deliberate approach to establishing effective staff processes necessary to achieve and maintain the shared understanding that enables decision support for the commander. <i>- No DoD definition. This is a commonly used definition</i></p>	
<p>Information Management (IM): The function of managing an organization's information resources for the handling of data and information acquired by one or many different systems, individuals, and organizations in a way that optimizes access by all who have a share in that data or a right to that information. <i>- DoD definition</i></p>	
<p>B2C2WG & OPT: Boards, Bureaus, Centers, Cells, Working Groups and Operational Planning Teams. All are means to integrate the staff.</p>	
CCDR: Combatant Commander	JTF: Joint Task Force
CCMD: Combatant Command	LNO: Liaison officer
CJTF: Combined JTF	NGO: Nongovernmental Agency
COS: Chief of Staff	OGA: Other Governmental Agency
HHQ: Higher Headquarters	SOP: Standing Operating Procedures
HQ: Headquarters	SVTC: Secure Video Teleconference
J-Dir: Joint Staff Director (e.g. J-3)	TOR: Terms of Reference
JMD: Joint Manning Document	TTP: Tactics, Techniques, Procedures



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