Texas Military
Office of the Adjutant General
Austin, Texas 78763-5218
1 July 2014

Standard Operating Procedures
(SOP) 25-52

STAFF ACTION PROCESS AND CORRESPONDENCE
POLICIES AND PROCEDURES

Applicability. This memorandum applies to all components of the Texas Military which includes the Texas Military Forces (TXM) and the Texas Military Department (TMD).

Proponent and Exception Authority. The proponent of this memorandum is the Adjutant General's (TAG's) Chief of Staff (CofS). TAG's Secretary of the General Staff (SGS) is the executor of the staff action process and correspondence policies and procedures within the TXM for TAG's CofS. TAG's SGS has the authority to approve exceptions to this memorandum consistent with controlling law and regulation. Users are invited to send comments and suggested improvements to TAG's SGS/NGTX-ZCS-XO, P.O. Box 5218, Austin, Texas 78763-5218.

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1. **Purpose.** This SOP prescribes policies and procedures for the Staff Action Process within components of the TXM. It also contains correspondence guidance, examples, and templates.

2. **Staff Relationships and Responsibilities.**

a. The Texas Military (TXM) is a unique agency, in that it performs Texas Army National Guard (TXARNG) (including Domestic Operations [DOMOPS]), Texas Air National Guard (TXANG), Texas State Guard (TXSG), and TMD functions (see figure 1). Direct coordination and exchange of information among all echelons, both internal and external to the TXM, is essential to ensure timely, integrated, pertinent, and accurate staff work. The

b. The Adjutant General (TAG or AG), Commander/Deputy Adjutant General-Army (CDR/DAG-Army), Commander/Deputy Adjutant General-Air (CDR/DAG-Air), TXSG Commander, Senior Enlisted Advisor (SEA), and TMD Executive Director approve and establish overall policy direction and guidance. Collectively, TAG, CDR/DAG-Army and CDR/DAG-Air are also referred to as the Command Group (CMD GRP).

c. TAG's Staff, Office of the Adjutant General of Texas (AGTX). TAG's Staff assists the CMD GRP with the formulation, development, and coordination of policy and implementation of procedures for the TXM. TAG's Staff exercises tasking authority for the CMD GRP in designated functional areas through TAG's (TAG's CofS) and Secretary of the General's Staff (SGS). TAG's Staff constituent members are as follows: Personal Staff - Inspector General, General Counsel, Senior Enlisted Advisor, Public Affairs Office, United States Property & Fiscal Office (USPFO), and Chaplain; Special Staff – Government Affairs, Strategic Initiative Group, Garrison Commandant, Joint Surgeon, Protocol Office, General Officer Management Office, and Human Resources Office. TAG's Staff is responsible for maintaining, coordinating, integrating, and reviewing policy in their functional areas. Directorate and Office Chiefs determine which actions in their functional areas must be reviewed by TAG's Staff, and ensure that those actions are routed to the appropriate TAG's Staff principal(s) for review prior to submitting to TAG's SGS.

d. TAG's CofS. The CofS is the proponent of the staff action process and correspondence policies and procedures for AGTX, and is directly responsible to TAG. The CofS directs staff efforts in all Staff Action Process and Correspondence Policy matters, and coordinates the activities of all agencies reporting to the CMD GRP. The CofS supervises AGTX activities and provides administrative control and support of AGTX operations. The CofS normally exercises this responsibility through the SGS.

e. TAG's SGS. The SGS is the executor of the staff action process and correspondence policies and procedures within AGTX for TAG's CofS. The SGS is the point of contact between the directorates, components, TMD, and other external tasking agencies.

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3. **Staff Action Process and Procedures.**

a. TAG's CofS acts on the behalf of the CMD GRP to exercise directive authority over the TXM and to coordinate activities of all offices reporting to TAG. TAG's CofS has the authority to task all agencies within the TXM. The CofS often exercises this authority through TAG's SGS.

b. TAG's SGS is the TXM principal executor for all CMD GRP formal tasking actions and routine staff action processing. A formal tasking action is defined as an action processed by TAG's SGS (see Appendix A for detailed definition of tasking); a routine staff action is defined as internally generated actions created by components or TMD to meet current and/or ongoing mission requirements.   Components and TMD may initiate routine actions and forward them to TAG's SGS for action. All components and TMD will route formal tasking actions through TAG's SGS. All formal tasking actions must be responded to, staffed, and completed in accordance with (IAW) established suspenses by order of the CMD GRP. See Figure 1 for a model that portrays the Staff Action Workflow Process (a map that describes how staff actions generally move through the CMD GRP).

c. The SGS ensures that staff actions are processed in a responsive manner IAW established suspense dates. The SGS is the CMD GRP's receiving, routing, and tasking point for queries, information papers, and briefings. The SGS receives or develops instructions and provides information to the requesting agency on behalf of the CMD GRP.

d. All staff actions forwarded for signature to the CMD GRP level will be processed through the SGS. Exceptions to this rule include selected actions prepared by TAG's Staff and the CofS. Actions of a sensitive nature originating in the General Officer Management Office (GOMO), Inspector General (IG), or General Counsel (GC) may be routed by the originating agency directly to the CofS for action.

e. Regardless of the sensitivity of the action, a copy of all documents signed by the CMD GRP will be processed through the SGS.

f. The following applies to the use of electronic mail (e-mail) in the Staff Action Process: (see Appendix L for additional guidance on e-mail).

(1) The use of e-mail to provide advance notice for tasking actions is encouraged.

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(2) The use of hardcopy e-mail for proof of coordination in the Staff Action Process is authorized. The e-mail will be added as content and tabbed appropriately in the staff action package.

g. Briefings. Preparation of briefings within the CMD GRP is IAW guidance in Appendices A and F. TAG Staff and Division/Office Chiefs will coordinate with appropriate CMD GRP Support Staff to schedule a briefing and to determine the recipient, length, and attendees.

h. Completed staff actions. Actions will be staffed, coordinated, and completed within specified suspense dates. For an extension, if necessary, see paragraph m (2) below. "Completed" means that all required concurrences and/or signatures have been gained from the appropriate TAG Staff member(s), the CofS, and the CMD GRP. In cases of regulatory taskings/actions, a legal review from NGTX-GC is necessary.

i.   General Staff Action Process. Appendix A provides the general Staff Action Process for the TXM. Appendices B through D provide specific guidance for selected staff action processes and products.

j.   Priority Actions.

(1) Correspondence. Correspondence from members of Congress, the Governor, state elected officials, or NGB senior leadership will receive personal replies from the CMD GRP, unless otherwise directed by the CMD GRP. Such correspondence is held to a strict and short suspense of seven (7) working days. Contact the SGS immediately if a tasking action of this nature has been misdirected.

(2) Congressional Inquiries. These are requests for assistance and information that are received from constituents by Members of Congress. The requests are forwarded by the service member to TAG for a response. These actions are usually sent directly to the appropriate component or TMD by the CMD GRP liaison (NGTX-ZCS) for necessary action.

k. Integration and Coordination.

(1) All required integration and coordination must be completed by the action office before the staff action is forwarded to the SGS for final review, routing, and closure. This includes all staff coordination as well as all required legal coordination. The Office of Primary Responsibility (OPR) (the office that originates the action) is responsible for ensuring the package/correspondence is in the proper format and on the appropriate letterhead.

(2) Informal staff coordination or concurrence with actions does not presume CMD GRP decision or position.

(3) It is the responsibility of the Office of Primary Responsibility (OPR) to integrate and coordinate staff actions with all specified and implied coordinating agencies. Early and throrogh coordination will preclude last minute non-concurrences, rewrites, and/or delays.

(4) Coordination can be initiated informally by face-to-face contact, by telephone, e-mail, working draft, etc. Early contact with all parties internal and external to the CMD GRP is encouraged. However, the final action should reflect the name, position, and office level at which coordination was accomplished.

(5) The TXM uses the Staff Summary Sheet (SSS) to record formal coordination. Informal coordination may occur at the OPR level; however, formal coordination between components/directorates/TMD will occur at Directorate/Office Chief level. Coordination reflected on the SSS signifies the Directorate/Office Chiefs position. The Directorate/Office Chiefs should clearly articulate policy within their agency that governs delegation of authority to sign-off on the SSS. The SGS is the proponent for the SSS (see Appendices B and C for instructions).

(6) Coordination and comments will show official positions only, not personal opinions.

(7) Concurrences will not be assumed. If no response is received or an extension is required, initiate follow-up action with the SGS to verify the disposition.

(8) The term "noted" is an annotation used to indicate review of an action which requires no substantive comment or coordination. It reflects only that the specific paper has been seen and connotes neither concurrence nor nonconcurrence.

(9) Nonconcurrences should be resolved when possible. Should a Directorate/Office Chief continue to nonconcur with an action that does not require CMD GRP review, the lead component chief may override the nonconcurrence if there is no direct impact on other agencies. When a nonconcurrence involves functional responsibility not wholly within the purview of the action office or when the nonconcurrence involves two or more functional areas, the action must be referred to the CMD GRP for resolution.

(10) Direct lateral coordination between Components/TMD during the coordination process is authorized. The OPR establishing suspense dates during the coordination process will ensure that reasonable time is given to accomplish the action. Agencies/offices will respond by the suspense date given or negotiate an extension with the tasking office.

l. Identification and Control of CMD GRP Taskings.

The SGS will ensure that responses to formal CMD GRP tasking actions are complete, properly formatted and assembled, alternatives have been considered, and appropriate coordination is reflected to include the name or position of the responding agency. Responses that do not meet these criteria will be returned to the originating office for corrective action.

   m. Suspense System.

      (1) The TXM suspense system has sufficient flexibility to balance the need for responsiveness with the need for complete staff actions. The SGS will notify Components and TMD of short suspense actions as soon as possible after receipt, via E-Mail or telephone. The following response times for staffing formal tasking actions and routine staff actions are established as general guidance governing the assignment of suspense dates:

         (a) CMD GRP Priority Actions: "Hot" – one to three days, as appropriate. These actions are deemed by the CMD GRP or the CofS as the highest priority actions. Note that extension of "Hot" taskings is rarely permitted. Every effort to answer these priority actions within the established suspense must be made by the staff. Component and TMD leaders should prioritize workload accordingly.

Note. "ASAP" will not be used as a suspense date under any circumstance.

         (b) General Officer Level Correspondence: "Immediate" - completed within seven working days. An example of this type of action would be an inquiry from the Adjutant General to the TXARNG for information or action.

         (c) Other than General Officer: "Routine" – complete within 14 working days.

         (d) Actions received by the CMD GRP with an established suspense date: the originator's suspense date will be used as the CMD GRP suspense for the action. Care should be taken to ensure the established suspense is realistic and IAW SOP.

         (e) Other cases: Evaluated by SGS and suspense assigned, as appropriate.

      (2) Extensions to Suspense Dates. If a suspense cannot be met for a formal CMD GRP tasking action that is going outside the components or TMD, an extension must be requested and an interim response must be sent prior to the original suspense date. Contact the SGS to request extensions.

   n. Signature Documents.

      (1) Documents for signature by the CMD GRP will be watermarked "DRAFT" during phases I – III of the the staffing process and prepared in final form when

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submitted to CMD GRP (see Appendix A). All CMD GRP and General Officer correspondence will be prepared on Texas Military Forces letterhead (see Appendix D for templates).

      (2) When forwarding documents for signature, Action Officers will tab the document(s) for signature, i.e. memo for TAG signature (refer to Appendix B).

      (3) Label all documents (Encls, Reference, Original Memo from TAG etc.) when adding content to a staff action package (refer to Appendix C).

      (4) All documents forwarded to the CMD GRP for information or action will reflect format and paragraphing IAW applicable component and AGTX correspondence policies and regulations.

    o. Transmittal.

The TXM uses the SSS as the official transmittal document for all staffing actions. The SSS provides the reader with critical, pertinent information: the purpose, action required, background, discussion, and a recommendation. When properly completed, the SSS serves as a stand-alone document that provides the decision maker and coordinating agencies with a synopsis of the action.

   (1) The coordination section of the SSS should indicate review (via initials) from all appropriate offices/staffs.

   (2) The discussion section of the SSS should contain critical staffing information not found in the proposed correspondence for signature.

Figure 1 - Texas Military Organization

Staff Action Process Model
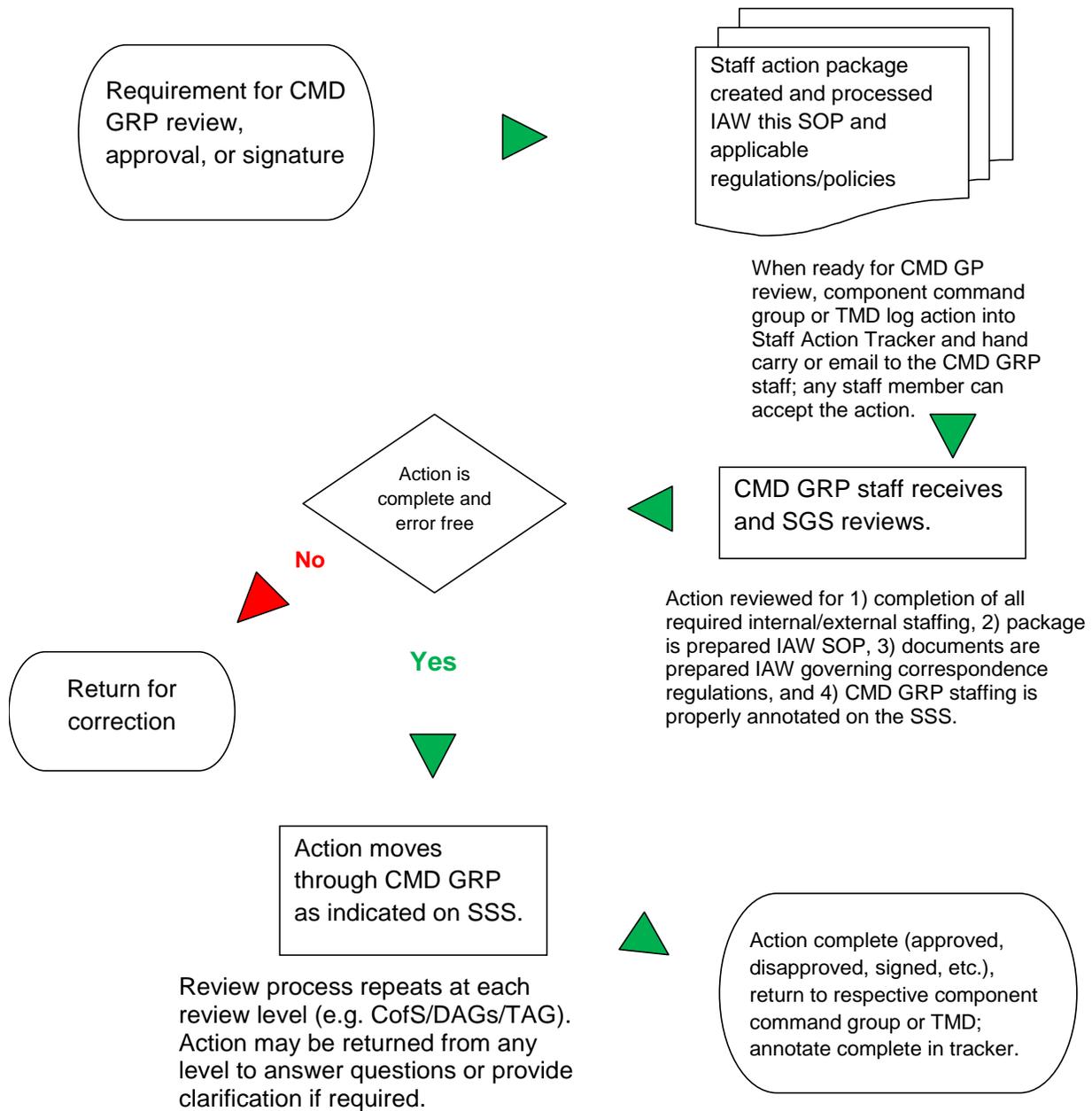
Figure 2 - Staff Action (Workflow) Process Model

4. **Correspondence.**

    a. General policy guidance.

       (1) Correspondence must convey effective communication. To facilitate this, follow governing regulations and the following standards for a more effective writing style:

       (a) Deal in specifics, not generalizations.

       (b) Convey an expedient and concerned reply.

       (c) Convey that all alternatives have been explored.

       (d) Identify and emphasize any controversial matter.

       (e) Avoid the appearance of a form letter reply or a fill-in-the-blank response.

       (f) Avoid military or colloquial jargon.

       (g) Use simple language, brief sentences, and short paragraphs.

       (h) Address each issue raised in the incoming correspondence.

       (i) Avoid repeating words or ideas, minimize use of qualifying language, and be straightforward.

       (2) Appendices E and F contain templates, formats, and examples to assist the writer in preparing memorandums, letters, Internal and External Executive Summaries (EXSUM), Information Papers (IP), and other pertinent formats.

       (3) Appendices A and B provide instructions for completing the SSS and an example of the form. The SSS is used for staffing and coordination of all correspondence within the TXM.

    b. Letters versus memorandums.

       (1) Use letters when responding to any inquiry received in letter format or when corresponding with individuals or civilian agencies outside DoD.

       (2) Use memorandums when responding to any inquiry received in memorandum format or when corresponding within DoD.

    c. Acronyms. Use military and civilian acronyms in memorandums, if appropriate. Do not, however, use military acronyms when writing to individuals or organizations that

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would not be familiar with their use. When an acronym is used more than once, or is not well known, spell out the word or title the first time it is used and follow it with the abbreviated form. Thereafter, the acronym may be used.   Above all, do not overuse acronyms. Acronyms may be introduced in the subject line, but they must be preceded by the complete word or phrase first.

(1) Never start a sentence with an acronym or abbreviation.

(2) Established abbreviations are acceptable in all but the most formal writing. For reading ease, use only well-known abbreviations or those you think would be known by the recipient.

(3) Do not place a period after abbreviated words in addresses, for example, St (street), Blvd (Boulevard), and so forth. The word Fort can be abbreviated (Ft) when used with a location.

d. Margins.

(1) Memorandums. The standard margin is one inch from the left, right, top, and bottom of the page. Do not justify right margins.

(2) Letters. Adjust the margins on the page, centering the body of the letter as if it were going to be placed in a picture frame. Generally, allow left and right margins of 1 inch. Do not justify right margins. When preparing two or more pages, leave at least one inch margin at the bottom of the page.

e. Numbers.

(1) Spell out numbers less than 10 (one, two, three, etc.).

(2) Use numerals for numbers 10 and higher.

(3) When two or more numbers appear in a sentence, use numerals for both.

(4) Do not follow a spelled out number with the figure in parentheses.

(5) Originating office names and symbols: IAW JFTX Reg 6-01, Office Symbols.

f. Subject Line. Use only one subject and write the subject in 10 words or less, if possible. If the subject needs more than 10 words, limit the number of words and use authorized abbreviations. If the subject is more than one line, begin the second line flush with the left margin.

5. **Authorized Signature Blocks.**

MILITARY SIGNATURE BLOCK MEMORANDUM FORMAT	LETTER SIGNATURE BLOCK LETTER FORMAT

The Adjutant General

JOHN F. NICHOLS	John F. Nichols
Major General, TXANG	Major General, Texas Air National Guard
Adjutant General	Adjutant General

Deputy Adjutant General - Army

WILLIAM L. SMITH	William L. Smith
Major General, TXARNG	Major General, Texas Army National Guard
Deputy Adjutant General-Army	Deputy Adjutant General-Army

Commander, Texas Army National Guard

WILLIAM L. SMITH	William L. Smith
Major General, TXARNG	Major General, Texas Army National Guard
Commanding	Commanding

Deputy Adjutant General - Air

KEN W. WISIAN	Ken W. Wisian
Major General, TXANG	Major General, Texas Air National Guard
Deputy Adjutant General-Air	Deputy Adjutant General-Air

Commander, Texas Air National Guard

Ken W. Wisian	Ken W. Wisian
Maj Gen, TXARNG	Major General, Texas Air National Guard
Commander	Commander

Commander, Texas State Guard

MANUEL A. RODRIGUEZ VII   Manuel A. Rodriguez VII
MG (TX), TXSG   Major General (TX) Texas State Guard
Commanding   Commanding

Chief of Staff

GREGORY P. CHANEY   Gregory P. Chaney
Colonel, GS, TXARNG   Colonel, Texas Army National Guard
Chief of Staff, Ofc of the   Chief of Staff, Ofice of the
    Adj Gen   Adjutant General

APPENDIX A
STAFF ACTION PROCESS

1. **General.** The TXM use the Staff Action Process to provide the CMD GRP and the field with pertinent, integrated, coordinated, accurate, and timely information. A formal tasking has a lifecycle (inception through closure). The Staff Action Process has four distinct phases that mirror this life cycle process.

2. **Phase I: New Action.** A new action is either generated within the components, TMD, or CMD GRP or is received from an external agency. The two most common external sources for formal taskings are the NGB Staff (i.e., NGB-ZAS) or the Governor's Office. Regardless of where the action is received (i.e., directly to components or TMD or to SGS through distribution), it must be effectively managed and tracked through the organization as it matures.

3. **Phase II: Task Analysis and Assignment.** The requirement, OPR, and coordinating instructions are determined by the recipient of a formal task or originator of a routine action. Task analysis and assignments are conducted either by the SGS or by a TAG Staff member. In both cases, the problem solving process and common sense must be exercised. This ensures that the task is routed to the appropriate office for staff action and that suitable guidance is provided. Knowledge of TXM functional areas is critical to correctly assign a task or work a routine action within the organization.

    a. SGS Processing. The SGS receives the task or staff action and analyzes it to determine requirements for closure (i.e., "take appropriate action", "prepare decision briefing", "prepare memo for TAG or DAG's signature", etc.). The action is logged in the Staff Action Tracker (see i(1) (a thru c) below). Formal tasks are assigned to the lead component or TMD with other offices assigned an assist role as appropriate. In addition, minimum coordination requirements for task completion are established (lead agencies are not limited by these minimum requirements, and should fully coordinate final positions as necessary). Lead, assist, and coordination role responsibilities include:

        (1) OPR (determined by SGS, component or TMD based on task). Responsible for task/staff action from time of assignment/creation through closure. Integrates input from assisting offices (if applicable), into recommended final position or response. Coordinates draft CMD GP signature documents (watermarked "DRAFT" during phases I – III of this process), final version, position, or response with all specified and implied offices, both internal and external to organization. Controls tasking/staff action until assigned to SGS for resolution (in case of CofS or higher signature). After signature, distributes response and closes task/staff action as appropriate.

        (2) Assisting or Coordinating Office(s): Responds to OPR request(s) for information and provides input within established suspense dates.

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b. The SGS will assign the lead for formal tasking actions as follows:

(1) Component or TMD: As identified by office symbol (JFTX Reg 6-01).

(2) Specific POC: When directed by the CofS or higher authority, the SGS will assign the action to a specific POC (Action Officer) for action.

4. **Phase III: Task Development.** The product of this phase is a timely, synchronized, and cohesive proposed final product, position, or response that satisfies the requirement. The following steps articulate the Action Officer's (AO) blueprint for task development:

a. Receive task- conduct mission analysis.

b. Obtain Branch/Division/Office Chief guidance.

c. Check for suspense. Develop action plan to ensure suspense is met (given remaining steps (d) through (k) below). Consider use of backwards planning method.

d. Collect and analyze pertinent data/discuss with experienced AOs. Execute Boards, Councils, Groups Teams (BCGT) if appropriate (see Appendix D).

e. Prepare draft for coordination (briefing or correspondence). Prepare SSS.

f. Conduct internal integration and initial coordination.

g. Revise draft as necessary.

h. Conduct external (TXARNG, TXANG, TXSG, TMD, Governor's Office, etc.) integration and coordination.

i. Revise as necessary and complete staffing packet in final form (see Appendices B and C).

j. OPR forwards for final review and task resolution (Phase IV).

5. **Phase IV: Task Resolution.** Final coordination, routing, leadership action, and task closure. During this phase, the proposed final product, position, or response is coordinated with CMD GRP senior leadership through the SGS.

a. In the case of briefings, the lead agency coordinates pre-briefs and briefings to principals through SGS/Administrative Assistants/Aides, as necessary. (see Appendix H).

b. In the case of correspondence, the lead office submits the action to the SGS for administrative, content, and senior leadership review or approval.

(1) The SGS conducts administrative review (format, tone, grammar, and style of response). Ensures action is logged into the CMD GRP actions tracker and that minimum coordination (via initials on SSS) is recorded and moves the action to the CofS.

(2) The CofS conducts content review (substantive information) and chops SSS. The action is then assigned to the CMD GRP (SEA, DAGs, TAG) for review, approval or signature (as appropriate).

(3) The CMD GRP takes appropriate action (sign correspondence or initial SSS). The CMD GRP support staff (SGS or ADMIN NCOs) closes the action out in the Staff Action Tracker and returns the action to the respective component command group or TMD for distribution or further processing. Note that during task resolution, an action may be returned to the "lead" office for correction and/or modification (aka, REDO). In this case, the action is reassigned to component command group or TMD in the Staff Action Tracker as RETURNED. The SGS may correct minor deficiencies or makes minor changes.

APPENDIX B
INSTRUCTIONS FOR COMPLETING THE STAFF SUMMARY SHEET

1. These instructions allow staff members to create Staff Summary Sheets (SSS) that are relevant to the CMD GRP and coordinating agencies (see Figure B-1 for the SSS template).

2. The paragraphs below contain instructions on completing a SSS. A SSS must be completed for each action that is processed through CMD GRP. The SSS must be thorough and detailed enough to allow the readers to understand the nature of the subject and what they must do with the action and its attached documents.

3. SSS Fields to be completed:

Field	Instructions
Control Number	Leave blank; completed by appropriate CMD GRP administrative staff.
Office/Sys	Insert the correct office symbol for all reviewing/coordinating offices. Actions requiring CMD GRP review or action MUST include the SGS (NGTX-ZCS-XO) in the routing.
Office of Primary Responsibility(OPR)	Insert the correct, complete office symbol of the originating office. This will be the office of primary responsibility.
Action Officer	Insert the rank (if military) and first and last name of the primary point of contact for the action.
Phone	Insert the full phone number, not just the extension.
Date	Insert the date the action is fully prepared and enters the staffing process
Suspense Date	The date will be either assigned to the office of primary responsibility or created by the office of primary responsibility (see para 4(h) for suspense guidance).
Subject	Insert a concise, complete subject title. There should be no more than one subject per action.
Summary Block	Follow the paragraph prompts below. Depending on the subject matter some prompts may not apply; indicate this by simply typing N/A after the prompt.

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Purpose   Specify why the action has been initiated, e.g., to respond to a request for information from the Secretary of the Army.

Action Required   Specify what you would like the official to do such as sign, concur, review, note, etc. If approval is needed via initials only on the SSS, note in this area accordingly.

Background   Write the pertinent details, such as a historical summary, that led up to the creation of the action.

Discussion   Write the relevant facts and implications that support the subject. List attachments in in the lower right corner of the SSS.

Recommendation   Use action verbs to describe the outcome of the action such as to approve the decision and sign the memorandum.

SUMMARY SHEET

CONTROL NO. (leave blank)	SUMMARY SHEET

ROUTING & COORDINATION

OFFICE/SYS	DATE	CONCUR	NON-CONCUR	SEE ME	NOTED AND FORWARDED	REMARKS (OPTIONAL)
NGTX-ZCS-X						
NGTX-ZCS						
NGTX-AIR						
NGTX-ARM						
NGTX-Z						
Include Staff						
Coord As Req'd						

OFFICE OF PRIMARY RESPONSIBILITY (OPR) ORIGINATORS OFFICE SYMBOL	ACTION OFFICER POC Rank and Full Name	PHONE 512-782-XXXX	DATE 1 FEB 14	SUSPENSE SEE SOP

SUBJECT: Clear, concise description of the action.

SUMMARY:

PURPOSE: Specify why the action was initiated. Include a concise summary of the end result of the action. State any rationale necessary to justify the action desired.

ACTION REQUIRED: Specify what you want the official to "do" such as, approve/sign, review, note, etc. If the purpose is information only, attach the Staff Summary Sheet to the Information Paper template.

BACKGROUND: Specify the pertinent details, such as a historical summary, that led up to the creation of the action.

DISCUSSION: Specify the relevant facts and implications that support the action/subject. List attachments as tabs (IAW figure 7 of JFTX SOP 25-52); Tabs are displayed at lower right corner of the Staff Summary Sheet.

RECOMMENDATION: Use this paragraph when the Staff Summary Sheet is routed for action. State the recommendation, including action necessary to implement, such as approve and sign the memorandum. Recommendations should be precise, so that the reviewing official need only sign, approve or disapprove as appropriate. Do not use this paragraph when Staff Summary Sheets are submitted with Information Papers.

2 Tabs (example)
1. Memorandum for signature
2. NGB Directive

NOTES on preparation....
1. Every action coming to the CMD GRP for information or signature must include a Staff Summary Sheet.
2. Route actions through the appropriate component or TXMD Chief of Staff; packages that are ready for CMD GRP action must be turned into the CMD GRP SGS or one of the Executive Administrative Assistants. The action is assigned a control number and processed.
3. The SGS completes an administrative review (format, tone, grammar, and style) and content review (ensuring appropriate coordination). If there are significant errors or insufficient coordination, the action is returned for correction.
4. Properly prepared packages move through the CMD GRP through/to CofS, DAGs, and SEA (as applicable).
5. When action is complete, the respective component CMD GRP or TXMD will be notified to come and pick up the package.

JFTX 77   OCT. 2006   JFTX-CS

Figure B-1 – Staff Summary Sheet Template

APPENDIX C
ORGANIZATION AND PACKAGING OF STAFF ACTIONS

1. **General.** This appendix is provided to assist in preparing correspondence packages and staffing actions that require staffing/approval through the CMD GRP. Package contents may vary greatly but must always be prepared in accordance with the instructions outlined in this appendix.

2. **Package contents and processing requirements.**

    a. Format. Utilize an appropriate format from appendix E.

    b. Process. Use JFTX 77, Staff Summary Sheet, as the cover/transmittal. Staff Summary Sheet must be reviewed (initialed) by the director/office chief or their designated representative and all required coordination offices (see appendices B and D and Figure C-1).

    c. The final, coordinated staff action package is sent from the component command group or TMD to the CMD GRP. The action is logged in the Staff Action Tracker at the component command group or TMD level. Staff action packages may be received by any of the administrative assistants in the CMD GRP or the SGS. The SGS will review the action and submit through CofS and DAG(s) (as needed) to the AG (see Appendices B and D and Figure 2). Staff actions are tracked within the Staff Action Tracker through CMD GRP processing and back to the respective component command group or TMD when complete.

ARRANGING ATTACHMENTS TO JFTX 77
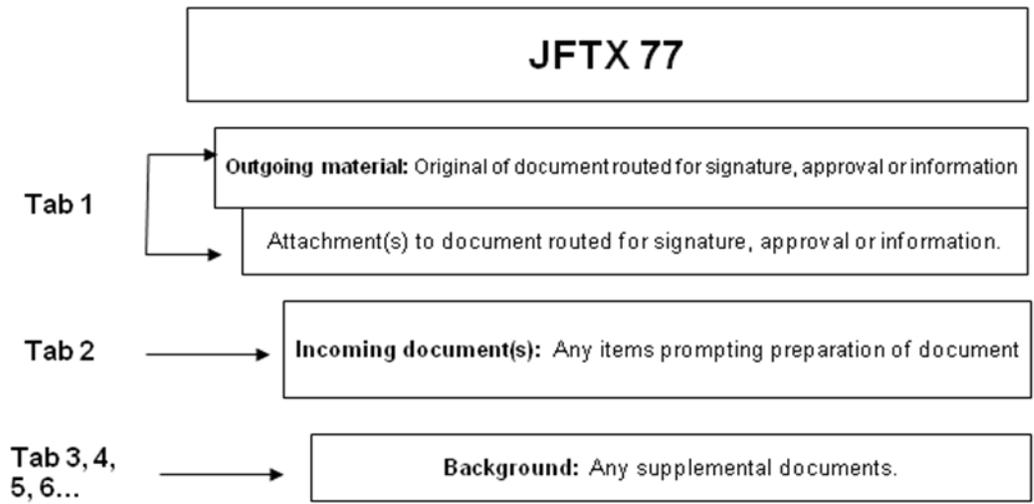
DOCUMENT ASSEMBLY EXAMPLES

Figure C-1 – Staff Action Package Assembly

APPENDIX D
Battle Rhythm and Teaming Process

1. **Event Horizons.** The TXM operates on three general event horizons – current operations, future operations, and future (strategic) plans. Each event horizon moves (spins) at different rates in terms of how it goes through the key aspects of the decision cycle. Each event horizon also requires battle-rhythm events supporting its planning, execution, and assessment.

    a. The **current** operations event horizon focuses on the 'what is,' and can rapidly progress through the decision cycle – sometimes minutes for quick breaking events. Current operations produce a larger volume of orders including fragmentary orders (FRAGOs). These kinds of activities generally *do not require detailed full staff integration* entailing the full headquarters. They do, however, require some limited planning capability.

    b. The **future operations** event horizon focuses on the 'what if,' and normally moves slower with more deliberate assessment and planning activities resulting in such things as major OPORDs, SOPs, FRAGOs directing major operations or processes within the command. *Future operations generally require full staff integration.*
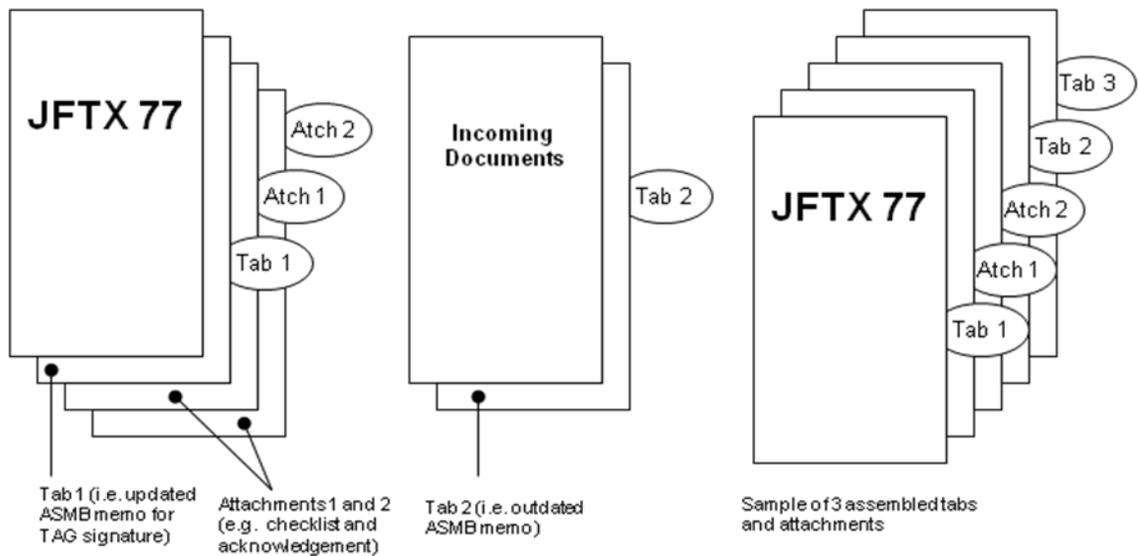
    c. The **future (strategic) plans** event horizon is focused on the 'what's next,' interacts heavily with higher headquarters' planning efforts, and moves very deliberately through the decision cycle. It focuses on activities such as development of OPLANs, Campaign Plan and Policy Directives. *These kinds of activities normally require full staff integration.*

2. **Boards, Councils, Groups, and Teams (BCGT).** BCGTs are the foundation for TXM battle rhythm. Principal staff actions and decisions will be executed using Operational Planning Teams (OPTs), working groups, and decision boards. Councils provide information and advice to the commander on a regular basis.

    a. **Boards**. A decision board is an organized group of individuals within a HQ appointed by the commander (or other authority) that meets with the purpose of gaining guidance or decision. The board's responsibilities and authority are governed by the authority which established the board. Command Boards are chaired by the commander; functional boards are chaired by another senior staff member to whom the authority to decide a particular matter has been delegated.

    b. **Councils**. An appointed or ad hoc group of subject matter experts or stakeholders who are called together for consultation, deliberation, or discussion in order to provide input and advice to the command for decisions.

c. **Working Groups**. A working group is an enduring or ad hoc cross-functional organization formed to develop, maintain and leverage expertise, information from within, and external to the headquarters to provide analysis and recommendations to the commander. Working groups are formed by the CofS and are chaired by primary staff officers. The CofS assigns membership to enduring working groups by appointment based upon recommendation of principal staff officers.

d. **Operational Planning Teams (OPT)**.   OPTs are established at any level to solve a single problem related to a specific task on a single event horizon.   The primary staff officer responsible for the focus of the OPT will direct milestones and team membership to ensure products are available for scheduled working groups or decision boards. When appropriate a lean-six sigma qualified team may be assigned as the OPT.

3. **Seven Minute Drill (SMD)**. Use the "Seven Minute Drill" to recommend battle rhythm events in support of commander decision-making. SMD items ensure that every event on the battle rhythm has a necessary purpose and defined inputs and outputs. A proposed battle rhythm event that has no output and only provides generic situational awareness, or an information brief outside the decision-making process may not belong on the battle rhythm. Elements of the SMD:

a. **Name of board or council**. Be descriptive and unique. Eg. State Readiness Board, Full Time Manning Board, Logistics Readiness Board, Plans Management Board, etc.

b. **Lead Staff Principal.** Receives, compiles, delivers, and manages the information. Lead will host the boards or councils and is responsible for all read-ahead information and logistics for the meeting.

c. **When/where**. When does it meet in the battle rhythm? May be tied to a suspense to higher headquarters or an item on the sync matrix.

d. **Purpose.** Brief description of the requirement.

e. **Inputs Required**. Staff sections or BCGT who provide products to the board or council, what those inputs are, and when the inputs are due (one day, week, month,etc).

f. **Output/Process/Product**. Products and/or decisions required from the events. How do products nest with other BCGTs.

g. **Membership**. Who will attend (becomes a task to staff in a FRAGO or appointment memorandum).

APPENDIX E
LETTERHEAD FORMATS

General. Letterhead for the TXMand TMD (except TXANG) bears the seal of the State of Texas in lieu of the seal of the Department of Defense.

TEXAS MILITARY FORCES
JOINT FORCE HEADQUARTERS
TEXAS MILITARY DEPARTMENT
POST OFFICE BOX 5218
AUSTIN, TX 78763-5218
512-782-5001

NGTX-XX   Date

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: EXAMPLE – Joint Force Headquarters/Texas Military Department Letterhead/Memorandum

1. Use this letterhead when correspondence signature authority is from a Joint Force Headquarters or Texas Military Department (formerly known as Adjutant General's Department) unit, directorate, department, or agency.

2. Letterhead format is shown above; titled Texas Military Forces in 10 point bold, Arial; organization, address, and phone number lines are 8 point bold, Arial.

3. The body of memorandums will be in 12 point Arial.

4. Refer to AR 25-50 for information on preparing and managing correspondence.

                                        JOHN Q. PUBLIC
                                        Major General, TXANG
                                        Adjutant General

DISTRIBUTION:
A
                Figure E-1 – JFHQ or TMD Letterhead/Memorandum Example

TEXAS MILITARY FORCES
ARMY NATIONAL GUARD
POST OFFICE BOX 5218
AUSTIN, TX 78763-5218
512-782-5001

NGTX-XX   Date

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: EXAMPLE – Texas Army National Guard Letterhead/Memorandum

1. Use this letterhead when correspondence signature authority is from a Texas Army National Guard unit, directorate, department, or agency.

2. Letterhead format is shown above; titled Texas Military Forces in 10 point bold, Arial; organization, address, and phone number lines are 8 point bold, Arial.

3. The body of memorandums will be in 12 point Arial.

4. Refer to AR 25-50 for information on preparing and managing correspondence.

JOHN Q. PUBLIC
Major General, TXARNG
Deputy Adjutant General - Army

DISTRIBUTION:
A

Figure E-2 – TXARNG Letterhead/Memorandum Example

DEPARTMENT OF THE AIR FORCE
HEADQUARTERS TEXAS AIR NATIONAL GUARD
CAMP MABRY, AUSTIN, TEXAS

Figure E-3 – TXANG Letterhead Example

TEXAS MILITARY FORCES
DOMESTIC OPERATIONS TASK FORCE
POST OFFICE BOX 5218
AUSTIN, TX 78763-5218
512-782-5001

NGTX-XX   Date

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: EXAMPLE – Domestic Operations (DOMOPS) Letterhead/Memorandum

1. Use this letterhead when correspondence signature authority is from a Domestic Operations (DOMOPS) unit, directorate, department, or agency.

2. Letterhead format is shown above; titled Texas Military Forces in 10 point bold, Arial; organization, address, and phone number lines are 8 point bold, Arial.

3. The body of memorandums will be in 12 point Arial.

4. Refer to AR 25-50 for information on preparing and managing correspondence.

                                                  JOHN Q. PUBLIC
                                                  Major General, TXARNG
                                                  Deputy Adjutant General - Army

DISTRIBUTION:
A

Figure E-4 – DOMOPS Letterhead/Memorandum Example

TEXAS MILITARY FORCES
TEXAS STATE GUARD
POST OFFICE BOX 5218
AUSTIN, TX 78763-5218
512-782-5001

NGTX-XX   Date

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: EXAMPLE – Texas State Guard (TXSG) Letterhead/Memorandum

1. Use this letterhead when correspondence signature authority is from a Texas State Guard unit, directorate, department, or agency.

2. Letterhead format is shown above; titled Texas Military Forces in 10 point bold, Arial; organization, address, and phone number lines are 8 point bold, Arial.

3. The body of memorandums will be in 12 point Arial.

4. Refer to AR 25-50 for information on preparing and managing correspondence.

JOHN Q. PUBLIC
COL, TXSG
Commanding

DISTRIBUTION:
A

Figure E-5 – TXSG Letterhead/Memorandum Example

APPENDIX F
STAFF PAPER FORMATS

1. **Executive summary.** Use EXSUMs to provide a concise summary of information, updates, and interim responses to the Command Group. Although not intended to replace other staff papers, the EXSUM provides important information to the Command Group in a timely manner. Whenever possible, use EXSUMs instead of information papers (see figure F-1).

2. **Information paper.** Use an information paper to provide the reader pertinent facts in a clear and concise format (see figure F-2).

3. **Point paper.** Use a point paper to provide assessment, recommendations, and discussion points in outline form. It features short, to the point, easy to read bullet phrases. Use a point paper when the reader has a thorough knowledge of the subject. Minor variations in the point paper format are acceptable, if needed, to better present the information (see figure F-3).

4. **Position paper.** Use a position paper to define an organization's position or policy on an issue and promotes or defends a position (see figure F-4).

5. **Trip report.** Use trip reports to provide a summary of items discussed or discovered on official travel. Trip Reports are mandatory for visits to National Guard Bureau, staff assistance visits to units, staff inspection visits, engagements with elected officials, or when a directorate chief determines one is necessary. Trip reports may be submitted via e-mail as long as the date, location, purpose, summary of findings, actions taken, and comments are included. Route through channels and the Chief of Staff for the commander (see figure F-5).

6. **Decision memorandum.** Use a decision memorandum, when directed, to obtain decisions from the Command Group or higher HQ. Prepare this special-purpose action in informal memorandum format (see figure F-6).

EXECUTIVE SUMMARY   DD MONTH YR

(U) EXECUTIVE SUMMARY (EXSUM) TITLE. Use EXSUMs to provide a concise summary of information, updates, and interim responses to the Command Group. Although not intended to replace other staff papers, the EXSUM provides important information to the Command Group in a timely manner. Whenever possible, use EXSUMs instead of information papers. EXUMs will be included on a separate page or in the body of emails accompany all information to the commanding general such as new policy, regulation, directives from higher headquarters, etc. Add an EXSUM to the summary block of JFTX 77 (Staff Summary Sheet). EXSUMS should not exceed 15 lines and will use an Arial 12 point font. Principal staff officers will ensure each EXSUM is concise and address the information senior leaders require for strategic level situational awareness.

MAJ Kennedy/ NGTX-ACS/1234
APPROVED BY: COL Bradford-Jones

Figure F-1 – Executive Summary (EXSUM) Example

DD Month YYYY

INFORMATION PAPER

SUBJECT: Information Paper Format

1. **Purpose**. To provide guidance on the preparation and use of an information paper.

2. **Facts**.
   a. An information paper provides facts in a clear and concise format. The format may be altered to meet a specific need. Include the subject and the purpose. Paragraphs will contain only essential facts concerning the subject. There are two lines between the date and the title "INFORMATION PAPER." There is one line between "INFORMATION PAPER" and the subject line.

   b. Information papers are self-explanatory and will not refer to enclosures, except for tabular data, charts, or photographs.

   c. Information papers should not exceed one page in length. If a continuation page is unavoidable, number pages starting on page 2, bottom center. Do not repeat the subject line, title, or date on the second page.

   d. Information papers do not require signature, but must include the AO's name and telephone number in the lower right corner. Type the AO's information on the third line below the last paragraph. Type an approval line below AO's name and number to indicate directorate approval by principal, deputy, or director.   Right justify the AO contact information and "APPROVED BY" lines.

   e. Avoid using acronyms and abbreviations, except those that are familiar outside the Army. Avoid using classified information when it does not contribute to understanding the issue.

   f. Information papers should not include a decision statement.

MAJ Kennedy/ NGTX-ACS/1234
APPROVED BY: COL Bradford-Jones

Enclosure
1. Title of Enclosure 1
2. etc

Figure F-2 – Information Paper Example

DD Month YYYY

POINT PAPER

SUBJECT: Point Paper Preparation

1. **Purpose:** To provide sample point paper format.

2. **Assessment:** Identify stakeholders and implications of his/her position on topic or issue. Consider impact to operations, organizations, resources, public opinion, etc.

3. **Recommendation(s):** Based on the assessment, provide the recommended position or course of action. N/A (if not applicable).

4. **Discussion Points:**

- Use a point paper to provide assessment, recommendations, and discussion points in outline form.

- Use a point paper when the reader has a thorough knowledge of the subject. Minor variations in the point paper format are acceptable, if needed, to better present the information.

- Use bullet statements to outline discussion points supporting paragraphs 2 and 3 above. Short, to the point, easy to read.

- Font: Arial 12. Margins: 1 inch for the top, bottom, left, and right.

- One page preferred. However, if two or more pages, place page number at bottom center beginning on the second page.

MAJ J. Bowie/ NGTX-ACS/512-782-5066
APPROVED BY: COL Bradford-Jones

Figure F-3 – Point Paper Example

DD Month YYYY

POSITION PAPER

SUBJECT: Title (word, phrase, or question defining the issue)

1. **Background**. Short overview that does not overshadow the position paragraph below. If the sheet is one of many collected for a common purpose, consolidate the background in a single document and eliminate from the individual sheets. There are two lines between the date and the title "POSITION PAPER." There is one line between "POSITION PAPER" and the title line. Type the AO's information two lines below the last paragraph. Type an approval line below AO's name and number to indicate directorate approval by principal, deputy, or director.   Right justify the AO contact information and "APPROVED BY" lines.

2. **Position**. Sentence or short paragraph stating organization's policy or position on the issue.

3. **For the Position**. Supporting facts and arguments sequenced, labeled, and subdivided.

4. **Against the Position**. Summary of each argument against the position. Be accurate when representing opposing views.

5. **Rebuttals**. Summary of rebuttals to opposing arguments. Ideally, rebuttals will reinforce the position.

6. **Sources**. List sources: If using only one source, label this paragraph specifically (for example, **Point of Contact**).
  a. AO (name, office, phone).
  b. Subject matter experts.
  c. Supporting documents.
  d. Related point or position papers.

MAJ J. Bowie/ NGTX-ACS/512-782-5066
APPROVED BY: COL Bradford-Jones

Enclosure
1. Title of Enclosure 1
2. etc

Figure F-4 – Position Paper Example

DD Month YYYY

TRIP REPORT

1. **Purpose.** A brief statement explaining the date, location, people or unit visited and purpose of the trip. NOTE: This report may be submitted via e-mail sent to the FOR recipient with each THRU individual on the courtesy copy line.

2. **Trip Summary.**

    a.   Provide concise summary of areas and items discussed or discovered. List any problems encountered.

    b. Include unique summary items on a separate sub paragraphs

    c. Include enclosures as necessary

3. **Actions**. List action taken, pending, or proposed from items discussed on the trip

4. **Comments.** Comment on those areas of special staff interest

5. **Point of Contact.** Include POC name/rank, title, telephone number, and e-mail address.

                                      MAJ J. Bowie/ NGTX-ACS/512-782-5066
                                        APPROVED BY: COL Bradford-Jones

Enclosure
1. Title of Enclosure 1
2. etc

Figure F-5 – Trip Report Example

DECISION PAPER
LETTERHEAD

Office Symbol   DD Month YYYY

MEMORANDUM THRU

Deputy Chief of Staff Operations – G3
TXARNG Chief of Staff
TXARNG Commanding General

FOR The Adjutant General of Texas

SUBJECT: Decision Paper Format

1. For **DECISION.**

2. **Purpose.** In one concise sentence state the action to be taken (for example, "To gain CG approval of the issues developed at the Strategic Planning Workgroup held at Camp Mabry, 23-24 Oct 12")

3. **Recommendation(s).** This paragraph contains specific recommendations; for example, "CG sign the enclosed memorandum at TAB A-1." Under each recommendation type:

APPROVED_____   DISAPPROVED_____   SEE ME_____

4. **Background.** This paragraph explains the origin of the action and conveys assumptions and facts necessary to understand the recommendation. Present facts as a chronological summary of actions or events leading to or bearing on the issue.

    a. Use a decision memorandum, when directed, to obtain decisions from the Command Group or higher HQ. Prepare this special-purpose action in informal memorandum format. _Do not exceed two pages_, excluding supporting documents.

    b. The memorandum content should represent the complete situation, without relying on enclosures. Summarize issues and reserve enclosures for a detailed analysis or explanation of the summary presented in the memorandum. Identify enclosures contained at tabs in the body of the decision memorandum.

c. Use JFTX Form 77 (Staff Summary Sheet) when submitting decision memorandums to the Command Group. Keep information in the JFTX Form 77 (Staff Summary Sheet) brief, with an EXSUM of the issue including short background summary, and coordination.

5. **Discussion**. This paragraph lists/assesses the alternatives considered. Assess the alternatives considered for the decision in terms of advantages and disadvantages. Include documents that support the recommendation as enclosures at tabs. Summarize their key points in the decision memorandum.

a. **Course of Action (COA) 1:** (Advantages/Disadvantages) If a decision memorandum is longer than one page, at the top of all continuation pages, type the office symbol at the left margin, 1 inch from the top edge of the paper, and the subject line on the next line below the office symbol. Begin typing the text on the third line below the subject phrase.

b. **COA 2:** (Advantages/Disadvantages)

c. **COA 3:** (Advantages/Disadvantages)

6. **Impact.** This paragraph indicates impact of the recommended decision. A staff action may have an impact on personnel, equipment, funding, stationing, etc. Identify individuals or organizations the recommendation impacts, and to what extent. If none, state "No impact."

7. **Coordination.**

NGTX-AH, G-1   CONCUR/NONCONCUR_____DATE
NGTX-AO, G-3   CONCUR/NONCONCUR_____DATE

8. POC Include POC name/rank, title, telephone number, and e-mail address.

Encl   JAMES BOWIE
                                        MAJ, TXARNG
                                        Staff Officer

Figure F-6 – Decision Paper Example

APPENDIX G
PROTOCOL OFFICE SUPPORT

1. **General.** The protocol office staff serves as the Texas Military (TXM) subject matter experts on protocol issues in regard to ceremonies and official functions; the protocol office is responsible for events hosted by the Adjutant General. For all other events, the protocol office provides assistance and guidance to the hosting unit upon request. Requests for assistance or information may be sent to mailto:ng.tx.txarng.list.access-list-protocol@mail.mil

2. **Adjutant General Hosted Recognition Ceremonies.**

    a. TAG hosted recognition ceremonies are scheduled each third Thursday of the month and each Saturday of HHD, Joint Force Headquarters(-) drill weekend at 1400 hours (contigent upon mission requirements and available participants).

    b. To request participation, a ceremony participation request form (see Figure G-1) must be completed and turned in to the protocol office no later than 30 days prior to the desired ceremony date. All awards and presentation items must be confirmed as complete/available no later than 10 business days prior to the ceremony; these same items must be physically delievered to the protocol office at least 72 hours prior to the ceremony date.

    c. The protocol office provides scripts, designs and prints programs, posts flyers, coordinates TXALL announcements, and plans and coordinates the reception requirements.

3. **Other Ceremonies.** The protocol office is available to provide samples and templates of scripts, programs, and flyers for other ceremonies (non- TAG hosted). Equipment, food, set up, breakdown, cleaning, hauling, etc., are the responsbility of the individual(s) requesting or hosting the event.

4. **Building 8 Auditorium Scheduling/Usage Policy**. Use of the Building 8 auditorium is scheduled through the protocol office. Requestors must fill out an auditorium request form (Figure G-2) under the forms section. Upon receiving the request, the protocol staff confirms the auditorium is available and adds the event to the auditorium calendar on the protocol website. Audio visual support (if desired) must be requested separately through the TXARNG G6 office by submitting DA Form 3903. Requestors from outside organizations must request auditorium use through the Garrison Command office due to fee requirements.

5. **Requesting Flags**. All flag requests must be coordinated through the protocol office at least one week prior to the pick-up date. Flags will be signed in and out on DA Form 2062 – Hand Receipt.

6. **Camp Mabry Distinguished Visitor (DV) Procedures**

    a. Camp Mabry objectives for DV visits are to accommodate all visitors with appropriate protocol procedures in accordance with Department of Army (DA) Pamphlet 600-60 (A Guide to Protocol and Etiquette for Official Entertainment) and Forces Command (FORSCOM) Regulation 350-21 (Visits to FORSCOM Active and Reserve Component Installations, Centers, and Units).

    b. When the protocol office receives a request from the J7 or other staff section/agency, a protocol specialist will be assigned to provide assistance. If the requestor does not have complete information at the time of request, a follow-up contact must be arranged. Coordination will then begin to generate a plan of action to meet the requirements of the visit.

    c. Visitor Intent: The visitor's intent and purpose of the visit are the most critical factors in determining how to process a DV request, obtain TAG approval, and develop an itinerary. Any other pertinent data such as previous visits, if any, relationship of visit to duty position, future rotations, etc must also be provided.

    d. Foreign Visitors: All requests for visit authorizations (RVA) or invitations to visit from foreign partner nations to the installation will be approved by The Adjutant General or the Deputy Adjutant General and Chief of Staff. All coordination with protocol will be through the J7/State Partnership Program on the requirements IAW the needs of the visit.

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AGTX Protocol Office

Request for Recognition Ceremony Participation

Official Texas Military Forces Recognition Ceremonies are held twice each month at 1400 hours; one Thursday each month and on Saturday of JFHQ drill. Dates and times are subject to change depending on need and mission requirements. ALL requests for ceremonies must be received by the Protocol Office no later than thirty (30) days prior to the desired ceremony date.

1. Date of Request: _____   Desired date of Ceremony: _____

2. Point of Contact for Request: _____
   Phone number_____ Email_____

3. Type of recognition:

   _____ Promotion   _____ Other _____
   _____ Retirement

4. Honoree Information:

   _____   _____   _____
   Name   Rank   Branch & Unit (TXARNG/TXANG/TXSG/State/etc.)

   _____   _____
   Street address (home)   City, State, Zip

   _____   _____
   Phone number   Email

5. Guest(s) of honoree: (use continuation sheet if necessary)

   Name: _____   Relationship: _____
   Name: _____   Relationship: _____
   Name: _____   Relationship: _____
   Name: _____   Relationship: _____
   Name: _____   Relationship: _____
   Name: _____   Relationship: _____

6. Individual(s) making presentations or participating in ceremony: (use continuation sheet if necessary)

   Name/Title: _____   How participating: _____
   Name/Title: _____   How participating: _____
   Name/Title: _____   How participating: _____
   Name/Title: _____   How participating: _____
   Name/Title: _____   How participating: _____

TXMF Protocol Form 600-60   Page 1 of 2   1 July 2014

AGTX Protocol Office

Request for Recognition Ceremony Participation

7. Required information/presentation items: Must be delivered to the Protocol Office ten (10) business days prior to the ceremony date. (NOTE: state and federal awards requests take a minimum 90 days; ensure requester or unit submits in time for presentation.)

   a. Retirement:
        (1) *Biography in paragraph format (send via email to the Protocol Office)*
        (2) *List of items to be presented (e.g. awards (state and federal), plaques, etc.)*
        (3) *Items from the Capitol (e.g. flag with certificate, Yellow Rose certificate) must be coordinated by the* <u>*REQUESTER or UNIT*</u> *through the Retirement Services Section and delivered to the Protocol Office.*
        (4) *Awards/Presentations (if applicable): List of items to be presented (e.g., awards, medals, plaques, etc.)*

   _____
   _____
   _____
   _____

   b. Promotion:
        (1) *Promotion order*
        (2) *Awards/Presentations (if applicable): List of items to be presented (i.e., awards, medals, plaques, etc.)*

   _____
   _____
   _____
   _____

8. Support Staff Requirements:

Event support staff may be required by the requestor. The Protocol Office will determine the number of support staff required based on the event size and details, as well as provide the report times and estimated completion times for the support staff.

7. Other notes (include any information that will facilitate the Protocol Office in supporting this event: _____
   _____
   _____
   _____
   _____

   8. Point of Contact: ng.tx.txarng.list.access-list-protocol@mail.mil (sends to all staff) or 512-782-1265.

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Figure G-1– Recognition Ceremony Participation Request

Request to Reserve Bldg 8 Auditorium
Maximum Capacity - 250

> Events scheduled in the Building 8 Auditorium must be coordinated and approved by the Texas Military Forces Protocol Office. Events held in this auditorium will be conducted in a professional manner; military-specific events will be conducted in accordance with appropriate military customs, courtesies, and traditions. The Protocol Office Staff reserves the right to refuse use for any events that do not meet these requirements.

Today's Date: _____

Requested by (Organization / Unit): _____

Point of Contact: _____

Phone Number: _____

E-Mail: _____

Description of Event: _____

Number of personnel to attend event: _____

Date(s) & Time Requested (Use DTG as per the example): day/hour/month/year

Set-up: _____   Start: _____   End: _____

       DDHHHHMMMYY   DDHHHHMMMYY   DDHHHHMMMYY

Key pick-up/drop off date and time: (example: 010630JAN13)

       Pick-up: _____   Drop-off: _____

               DDHHHHMMMYY   DDHHHHMMMYY

Audio-visual requirements: ☐ YES   ☐ NO
NOTE: Requesting organizations that require audio-visual support __ARE RESPONSIBILE FOR CONTACTING AND COORDINATING WITH THE VISUAL INFORMATION SPECIALIST.__ TXMF individuals __MUST__ submit a help desk ticket at
https://www.tx.ngb.army.mil/sites/jflcc/ArmyG6/OTRS/default.aspx.
(We cannot support laptop computers or IT personnel.)
POC: SGT Luke Allen, 512-782-7235 or luke.j.allen.mil@mail.mil.

Protocol Office Use Only

☐ APPROVED   ☐ DISAPPROVED

                                  _____
                                  Protocol Office Representative

POC: ng.tx.txarng.list.access-list-protocol@mail.mil (sends to all staff) or 512-782-1265.

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**BUILDING 8, AUDITORIUM
USER AGREEMENT**

General: The auditorium is intended for use by the Texas Military Forces and other approved organizations. The auditorium will be used for functions with audiences of 250 or less. Outside agencies must coordinate with Garrison Command for usage fees. Food and beverage are not authorized inside the auditorium. Your signature below and use of the auditorium indicates your agreement to adhere to the conditions outlined below.

Cancellation Policy: Approved requests are subject to cancellation due to mission requirements or by the direction of the Chief of Staff to support unplanned events. You will be contacted immediately if a cancellation is required.

Audio/Visual Needs: Requesting organizations are responsible for contacting and coordinating with the Visual Information Specialist, at least 10 working days prior to the scheduled event. All users must submit a help desk ticket for Audio Visual Support at: https://www.tx.nob.army.mil/sites/fflcc/ArmyG6/OTRS/default.aspx; you must contact SGT Luke Allen 512-782-7235 or luke.j.allen.mil@mail.mil.

Access to Auditorium: Users are responsible for picking up keys prior to the event (day prior or day of event) from the Protocol Office between 0800-1600 Monday through Friday. Keys must be returned to the Protocol Office immediately following the event or on the morning of the next duty day if the event is held during the evening or on weekends.

Protocol Office Contact Information: Camp Mabry, Building 8, Room C143; Phone: (512) 782-6807/1265/1182, Fax: (512) 782-5440; Email: ng.tx.txarng.list.access-list-protocol@mail.mil

Your complete cooperation is expected in maintaining the Auditorium. A charge will be assessed if the key is not returned, or if additional cleaning is required. Violation of any of the rules outlined in this agreement will terminate permission to use the Auditorium, both immediately and in the future.

- Food or beverages are not permitted in the auditorium.
- All articles brought into the auditorium will be removed prior to departing.
- All lights will be turned off.
- All outside doors will be secured/locked.
- All furniture will be moved back to its original location.
- None of the static display of flags will be moved or altered.
- If food or drink is served outside of the auditorium, the using organization must ensure the area is cleaned and orderly prior to departing.
- Notify the Protocol Office immediately of any damage or noted repair need.
- Coordination with Protocol for additional flag requirements will be made in advance.

I agree to the above.

_____   _____
Print name   Date

_____
Signature

_____   _____
Organization   Contact Phone

TXMF Protocol Form 600-61   Page 2 of 2   1 July 2014

Figure G-2– Building 8 Auditorium Request Form

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APPENDIX H
SCHEDULING APPOINTMENTS WITH COMMAND GROUP LEADERS

1. **General.** When creating a meeting request, ensure that you are requesting at the appropriate level. Ensure your Chief of Staff is aware of your intent to request a meeting with a General Officer (if applicable).

2. **Requesting a meeting.**

    a. To request a meeting with CMD GRP principals, complete the meeting request form via e-mail as shown below. A sample request form to meet with the Adjutant General is shown below (edit according for requests to meet with Deputy Adjutant's General or Senior Enlisted Advisor; the form must be filled out completely to facilitate scheduling:

+++
To ensure that your time with Maj Gen Nichols is as productive as possible, please answer the following questions:

1. This meeting was directed by the AG: Yes / No (If NO, redirect this request to the appropriate Chief of Staff)

2. Topic and Background:

3. Requestor Rank, Name, Phone number & Email address:

4. Amount of time required for meeting:

5. Suspense (latest date to meet with the AG) and reason for suspense:

6. List three to five dates you are available:

7. Other GOs/Chiefs of Staff Required:

8. Read ahead required to TAGs Chief of Staff 72 hours prior to meeting. Be prepared to pre-brief TAGs Chief of Staff.
+++

    b. The request is reviewed by the respective administrative assistant(s). If approved, the requestor will receive a calendar invite via Outlook. If disapproved, the requestor will be notified with an explanation.

    c. The requestor may be required to secure a meeting location if necessary; the administrative assistant will communicate with the requestor if such a need arises.

    d. Read aheads are required 72 hours prior to the scheduled meeting. Read-aheads should be in Executive Summary (EXSUM) or Information Paper format. Do not submit slide decks to be presented during the meeting as read aheads, they do not meet the requirement and will not be reviewed (see Appendix F for read ahead formats).

APPENDIX I
Special Funds

1. **General.** The Office of the Adjutant General manages two special funds; HQ-TXNG Special Fund – Federal, and JFTX-A Special Fund – State.

2. **References.**

    a. HQ-TXNG Special Fund – AR 215-1, Military Morale, Welfare, and Recreation Programs and Nonappropriated Fund Instrumentalities; HQ-TXNG Special Funds SOP.

    b. JFTX-A Special Fund – AGTX 230-2, Nonappropriated Funds and Related Activities, Special Funds.

3. **Camp Mabry Special Funds.**

    a. **Special Funds Council.** The Adjutant General's Special Fund Council is appointed by TAG's Chief of Staff annually, and includes representation of each component of the Texas Military.

    b. **Funds.**

        1) HQ-TXNG Special Fund – This fund is a federal fund, which is acquired through contract between IMCOM G9 FMWRC and AAFES. The Camp Mabry Post Exchange supplies a monthly dividend to the fund, which may be used IAW AR 215-1 for the benefit of DOD employees, families, and retirees.

        2) JFTX-A Special Fund – This fund is a state fund, which is acquired through rental of Camp Mabry property or donations to the Texas Military. Camp Mabry Garrison Command operates all rental agreements and accepts donations on behalf of the Adjutant General. This fund may be used IAW AGTX 230-2 for the benefit of all members, employees, and families of the Texas Military and Camp Mabry.

    c. **Requesting funds.**

        1) The Adjutant General's Special Fund Council accepts requests for funds through appointed members or the recorder in memorandum format. (Figure I-1)

        2) Funds are not distributed to individual units, but are used to support events that are open to the entire organization such as American Heroes Weekend and the Adjutant General's holiday open house. All requests will be reviewed at least quarterly, and will be replied to following the conclusion of each fund council meeting.

TEXAS MILITARY FORCES
JOINT FORCE HEADQUARTERS
TEXAS MILITARY DEPARTMENT
POST OFFICE BOX 5218
AUSTIN, TX 78763-5218
512-782-5001

Office Symbol   Date

MEMORANDUM FOR The Adjutant General's Special Fund Council

SUBJECT: Request for Funds

1. Request should include: Not to exceed amount in dollars, what the funding will support (specifically), and what other methods of requesting funds have already been attempted (if appropriated funds are a traditional method).

2. POC for this request is Mr. John Doe, Title, and can be reached at 512-782-0000 or by email at john.doe.mil@mail.mil.

                                        JOHN DOE
                                        RANK, BR, TXARNG
                                        Title

Figure I-1 – Request for Funds Example

APPENDIX J
The Adjutant General's Executive Council (TAGEC)

1. **General.**
The Council is comprised of 22 ex officio members (outlined in para 3 below). The council provides guidance and coordination for Texas Military issues and activities and ensures maximum unity of effort by providing advice and assistance to the Adjutant General.

2. **Purpose.**
The primary purpose of TAGEC is to provide advice and assistance on matters affecting policy, plans, programs, resources, training, readiness, and professional development of Texas Military Forces members.

3. **Membership.**

   a. Adjutant General (Chair)
   b. Adjutant General's Chief of Staff
   c. Texas Military Forces Senior Enlisted Leader
   d. Commander/Deputy Adjutant General – Air
   e. Director of Staff, Texas Air National Guard
   f. Commander/Deputy Adjutant General – Army
   g. Chief of Staff, Texas Army National Guard
   h. Chief of Staff, Texas State Guard
   i. Director, Texas Military Department
   j. Chief of Staff, Texas Military Department
   l. Each principal staff member of the Adjutant General's Personal and Special
Staffs:
     1) Garrison Commander
     2) General Counsel
     3) State Chaplain
     4) Director, Government Affairs
     5) Inspector General
     6) Strategic Initiatives Group Director
     7) Director, Manpower
     8) Public Affairs Officer
     9) United States Property & Fiscal Officer
     10) Secretary of General Staff

4. **Meetings.**

   a. Meetings are held bi-monthly on Wednesdays. Recurring calendar invites are sent to council members and they are notified of dates, location of meeting, and any adjustments.

   b. Attendance is limited to the members outlined above in paragraph 3. Members may send an appropriate representative if they are unable to attend. Additional personnel should only be in attendance if they are required for a briefing or presentation and may be dismissed if determined necessary after they complete their briefing or presentation.

5. **Quick Reads.**

   a. Quick Reads are specifically designed to provide TAG an at-a-glance reference that addresses his key areas of interest.

   b. Quick Reads must be updated bi-weekly and forwarded to the SGS no later than close of business on the Tuesdays prior to the council meetings.

   c. The following components/staffs are required to complete Quick Reads:

      1) TXARNG
      2) TXANG
      3) TXSG
      4) TMD
      5) DOMOPS
      6) USPFO

APPENDIX K
Mass Email Distribution Requests (TXALL/MabryALL)

1. **General.** Mass email distribution via TXALL and MabryALL distribution lists is a a communication method to transmit routine command information to the field. Routine command information is further defined as events and activities that are of interest to TXM employees and/or their family members.

2. **Purpose.**

     a. TXALL distribution is used to transmit information that is relevant to all employees of the organization, regardless of their location within the State of Texas. MabryALL distribution is limited to those employees and/or family members who physically work on Camp Mabry or within close proximity (e.g. Austin Army Airfield Support Facility, Bee Caves, Round Rock).

     b. TXALL/MabryALL messages will not be utilized to transmit information that involves operations, training, mobilizations, deployments or commitment of TXM resources, defined as personnel, funding, transportation or time. These communications should be coordinated through J3/G3, as appropriate, to generate a tasker or FRAGO. Additionally, job vacancies within the TXM, both State and Federal, will not be advertised using TXALL or MabryALL formats.

     c. Due to equipment and connectivity limitations of the TXM network, there are some M-Day and other personnel who will not recieve TXALL/MabryALL messages. It is the responsibility of MACOM chains of command to ensure that information contained in TXALL/MabryALL messages is transmitted by other means to those members of the force who do not have connectivity.

3. **Message Components.** Requests for distribution of TXALL/MabryAll messages must include six basic components: (note-attachments are not permitted, a link may be inserted in the "what" or "where")

     a. WHO: Describe to whom the message is intended.
     b. WHAT: A brief description of the event or activity. Include names, places, directions, links and other pertinent facts as appropriate.
     c. WHERE: The location of the event.
     d. WHEN: The date and time of the event.
     e. WHY: A brief description of why the event or activity is important.
     f.   POC: Name, phone number and email address of the responsible individual, MACOM or staff Directorate.

4. **Routing for Distribution/Approval Authority.**

   a. Requests for TXALL/MabryALL message distribution must first be routed by the requestor (through appropriate supervisory channels) to first O6 listed below in their respective chain of command:

      1) TXARNG Chief of Staff
      2) TXANG Director of Staff
      3) TXSG Chief of Staff
      4) DOMOPS Chief of Staff
      5) TMD Director
      5) Staff Directors (G/A/J1 through G/A/J8)

TAG Personal and Special Staff route their requests to the Command Group addressees in paragraph c below.

   b. The appropriate Director or Chief of Staff will review the request and either approve or deny distribution. Approved requests will be forwarded to the Command Group for final review and release.

   c. Final approval and release authorities for TXALL and MabryALL messages are as follows:

      1) The final approval and release of TXALL and MABRY ALL messages is the responsibility of the Adjutant General's Command Group. Specifically, within the Command Group, the following duty positions will be granted release authority by the J6/G6:
         (a) Chief of Staff
         (b) Executive Assistant to the Chief of Staff
         (c) Secretary of the General Staff (SGS). The SGS will serve as the primary release authority during normal business hours.

      2) The J3 Force Protection Officer, JOC Battle Captain, J6 and G6 also maintain release authority in the event that an operational, security, or emergency message release is required after normal duty hours, on weekends or holidays.

   d. The G6 is the staff proponent for the TXALL/MabryALL messages and are responsible to maintain the necessary network connectivity, maintenance of distribution lists and sending utility, as well as granting appropriate release permissions to those duty positions approved in this guidance.

APPENDIX L
E-mail Procedures and Etiquette

1. **Overview.** Electronic media is the preferred method of coordinating and disseminating memorandums and staffing documents within the Office of the Adjutant General of Texas (AGTX). Internal memorandums should be electronically coordinated and disseminated; coordination and dissemination of hard copy correspondence should be an exception.

2. **Official Business/Official Records.**

   a. Electronic media (including e-mail) that is created or distributed within AGTX is considered official and may represent the sender, command, and/or the Adjutant General. Official business communications are defined as those necessary in the interest of AGTX (for example, communications directly related to the conduct of AGTX business or having an indirect impact on AGTX's ability to conduct its business).

   b. E-mail is subject at all times to monitoring, and the release of specific information is subject to applicable state and federal laws, policies, and procedures on confidentiality. Existing rules, policies, and procedures governing the sharing of confidential information also apply. Since there is the possibility that any message could be shared with or without your permission or knowledge, the best rule to follow in the use of e-mail information is to decide if you would post the information on the office bulletin board with your signature.

   c. It is a violation of policy for any employee, including system administrators and supervisors, to access electronic mail and computer systems files to satisfy curiosity about the affairs of others. Employees found to have engaged in such activities are subject to disciplinary action.

3. **Sensitive Information/Personally Identifying Information (PII).**

All e-mails that contain sensitive information, information protected by the Privacy Act of 1974, or information protected under the Health Insurance Portability and Accountability Act must be encrypted with an approved DOD PKI certificate. Sensitive information includes personally identifiable information (PII) and For Official Use Only (FOUO) information.

   a. E-mail containing PII must be digitally signed and encrypted.

   b. Under no circumstance should PII be transmitted from a government server to a private server i.e., .mil to a .com email address.

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c. As a best practice, ensure the e-mail subject line contains "FOUO" if the email contains PII.

d. Ensure the body of the email containing PII includes the following warning: "FOR OFFICIAL USE ONLY."

e. Ensure you are sending the e-mail to the correct recipients and all have an official need to know.

f. Ensure you know what your attachment contains (i.e., PII) prior to sending. Do not forget to check all tabs the attachment is an Excel spreadsheet.

4. **Freedom of Information Act (FoIA) and Texas Public Information Act (TPIA).** AGTX official records are subject to release under these acts regardless of how informal the original intent. Treat emails as if the public will read them. Employees must be aware that the e-mail messages sent and received using AGTX equipment or AGTX-provided Internet access, including web-based messaging systems used with such systems or access, are not private and are subject to viewing, downloading, inspection, release, and archiving at all times.

5. **Message Format**.

a. *To.* Principal personal staff officers and subordinate commanders have direct access to TAG/ DAGs and may e-mail TAG directly, when possible, include the CoS on the cc. Except when directed by TAG/DAG, all other personnel will communicate through the CoS or SGS. Keep in mind the TAG/DAG get multiple e-mails, don't add to that burden unless the message is absolutely necessary. Route non-time sensitive items through the CoS or SGS for inclusion in the TAG/DAG reading files.

b. *CC.* Courtesy copy only those directly involved with the email topic

c. *BCC.* Rarely used.

d. *Subject Line.* Craft the content of subject lines to make the message easy to identify, prioritize, and search.

    1) ACTION, INFO, SA, CCIR, SIR, EXSUM, UPDATE, INVITE
    2) Summarize Message (Abbreviated BLUF)
    3) Suspense

Example: ACTION: Submit Legislative Appropriation Request S: 15 June 2013

e. ***BLUF:*** Describe the message and "take-away" of the email in three sentences or less.

f. ***Body.*** The body of an email should be brief but provide enough details that support the BLUF. If an attachment is included provide an EXSUM (See Appendix F) for the document.

g. ***Complementary Close.*** Optional. If used, should be appropriate for the rank and position of the recipient.

h. ***Standard Signature Block.***
       Name
       Position
       Unit
       Desk Phone
       Cell (optional)
       Other contact information (optional)

i. ***Classification and Caveats.***

j. **Prohibited items within an email message.** Quotes, emoticons, personal external web links.

Example Message:

```
From: Chaney, Gregory P COL USARMY NG TXARNG (US);
Sent: Tuesday, March 04, 2014 3:21 PM
To: Smith, William L MG USARMY NG TXARNG (US)
Cc: Johnson, Benjamin S COL USARMY NG TXARNG (US); Mintz, Oliver F LTC USARMY NG
TXARNG (US); Macgregor, Joanne E LTC USARMY NG TXARNG (US)

Subject: INFO - FY14 Quadrennial Defense Review (QDR) Released (UNCLASSIFIED)

BLUF:  The Secretary of Defense delivered the 2014 QDR report to Congress on
March 4, 2014. The 2014 QDR advances a national defense strategy that protects
and advances U.S. interests, sustains U.S. global leadership, rebalances the
Joint Force, and controls internal cost growth, while preserving and enhancing
the health of the All-Volunteer Force.

Sustaining a world-class Army capable of conducting the full range of operations
on and, including prompt and sustained land combat as part of large, multi-phase
joint and multinational operations by maintaining a force structure that we can
man, train, equip, and keep ready. To sustain this force, the Department will
rebalance within the Army, across the Active, Guard, and Reserves. The active
```

Army will reduce from its war-time high force of 570,000 to 440,000-450,000
Soldiers. The Army National Guard will continue its downsizing from a war-time
high of 358,000 to 335,000 Soldiers, and the U.S. Army Reserve will reduce from
205,000 to 195,000 Soldiers.

If sequestration-level cuts are imposed in FY2016 and beyond, all components of
the Army would be further reduced, with active duty end strength decreasing to
420,000, the Army National Guard drawing down to 315,000, and the Army Reserves
reducing to 185,000.

Respectfully,

Colonel Greg Chaney
Chief of Staff
Office of the Adjutant General
512-782-5022
@COLChaney

5. **Etiquette**

    a. Follow standard writing protocol.   Do not use informal language, emoticons, or informal e-mail or text message abbreviations. Use standard spelling, grammar, and punctuation rules. Because emails can inadvertently be sent to the wrong person or can be forwarded, keep the contents professional to avoid potential embarrassment.

    b. Keep messages brief and to the point. Attach or link to documents if complex.

    c. E-mail has limited value for staff coordination. Do not try to solve complex issues using e-mail. Simple coordination may be appropriate; anything beyond that should be taken to a face-to-face or electronic workgroup.

    d. Use capitalization appropriately. Using all lower case letters is considered mumbling and using all upper case letters is considered shouting. Asterisks or bold lettering are effective for emphasis. Color and graphics embedded in e-mails often do not transfer due to differences in e-mail programs

    e. Tone expresses a person's mood or emotion. This is not an easy thing to get across in writing, whether it's in an old fashioned letter or in an email. You want to sound respectful, friendly, and approachable, not curt or demanding.

    f. When possible, limit each message to one subject; create separate e-mails when more than one subject is required.

g. Do not use BCC to keep others from knowing who else you copied on an e-mail, but rather when sending to a large distribution list to keep others from having to see a large list of names.

h. Do not use email as an excuse to avoid personal contact. Face to face and voice to voice communications have value. Do not use e-mail when dealing with a problem with someone. Do not use e-mail to avoid an uncomfortable situation

i. Disable Reply to All and Forward.

j. Delivery and Read Receipts. No need to use them.

k. Never argue or be argumentative over e-mail.

APPENDIX M
Master Activities Calendar

TO BE PUBLISHED