

PART II
INTRODUCTION
TO THE STAFF STUDY REPORT

DURING YOUR CAREER in the Army, you will probably be called upon by the commander to investigate a problem situation and to submit a written report of your findings. In most instances, your commander will request that you recommend action that will solve the problem or, at the very least, action that will improve the situation. This means that you will be required to go through the problem solving process that you have just studied in order to derive a valid solution that you can recommend.

To avoid the possibility of confronting the commander with vague, incomplete, illogical, or unorganized oral or written explanations, a standard format exists for solution reporting. This format is known as the staff study report. The format is arranged in such a way as to allow the commander to read your recommendations hurriedly, thus allowing him more time to do the things that only he can do. In addition to serving this purpose, the staff study report also provides you with a ready-made vehicle for presenting your own ideas. A staff study report is not, however, a means of solving a problem. It is simply a format for reporting a problem solution once the problem has been solved.

After having read the above, you should have no difficulty in completing the following exercise. Check all of the following statements that appear to you to be valid reasons for preparing a staff study report.

- 1. The staff study report serves as a written record for later reference.
- 2. The staff study report serves as an accurate method for the transmission of information.
- 3. The staff study report serves as one of the best methods by which problems are solved by military personnel.
- 4. The staff study report protects the commander from vague or incomplete oral expression.
- 5. The staff study report serves as a guide by which military personnel solve problems for private industry.
- 6. The staff study report gives the staff officer a hearing on his own ideas.

You should have checked all of the statements except numbers three and five.

The format of the staff study report contains these four major parts:

1. The heading
2. The body
3. The ending
4. The attachments

Of these four major parts, the bulk of your writing will be done in accomplishing the body of the staff study report. Most of the remainder of your work will be done in composing and assembling the attachments. The other two parts, the heading and the ending, are of minor importance and will not be covered.

THE BODY OF THE STAFF STUDY REPORT

There are six sections to the body of the staff study report. Here they are in scrambled order with a brief explanation of each section to assist you in unscrambling them. When you have studied them, list them in the order in which they occur in the staff study report.

a CONCLUSION - The purpose of this section is to save the reader time. The conclusion does not conclude the body of the staff study; it simply offers a brief restatement of the best possible solution to the problem.

b ASSUMPTIONS - Any statements that may or may not be true are listed here. Example: (1) Approximately 20,000 prisoners per month for the next four months may be recovered by 1st Army. (2) Many of the recovered prisoners will probably require extensive medical treatment.

c DISCUSSION - In this section, you report the logic you used in reaching the conclusion. Example: Advantages in immediately moving recovered personnel to the communications zone are: etc.

d PROBLEM - This section states specifically what the problem is. You do not discuss the problem in this section. This section offers a simple statement of the problem and nothing more.

e FACTS BEARING ON THE PROBLEM - This is the section where definite facts are presented. Example: (1) Air transportation for 2,000 personnel a day is available. (2) There is no existing Department of the Army policy governing processing and evacuation of recovered prisoners of war.

f ACTION RECOMMENDED - This section winds up the body of the staff study report and represents completed staff work. It is here that you commit yourself to a preferred line of action. Included under attachments would be all of the directives that your superior would sign to initiate the action.

Place the sections of the staff study listed above in the proper order

1. d
2. b
3. e
4. c
5. a
6. f

HEADQUARTERS
DEPARTMENT OF THE ARMY
UNITED STATES ARMY PRIMARY HELICOPTER CENTER
Fort Wolters, Texas 76067

SUBJECT: Programed Instruction

1. PROBLEM: _____
2. ASSUMPTIONS:
 - a. _____
 - b. _____
3. FACTS BEARING ON THE PROBLEM:
 - a. _____
 - b. _____
 - c. _____
 - d. _____
4. DISCUSSION:
 - a. _____
 - (1) _____
 - (2) _____
 - b. _____
 - c. _____
5. CONCLUSION: _____
6. ACTION RECOMMENDED:
 - a. _____
 - b. _____

Annexes: A. Definitions
B. Discussions
C. Programed Text
D. Letter to CG, 4th Army

MARTIN HEUER
MAJ CE
Chief, TFPL

PROBLEM SECTION

SUBJECT: Programed Instruction

PROBLEM:

1. _____

2. ASSUMPTIONS:

a. _____

This section describes briefly what the problem is. Discussion is out of place here. The problem should be stated in one of the following forms:

1. As a question -- "What can be done to reduce the cost of mower maintenance so as not to exceed \$266.00 for the remainder of fiscal year 1966?"
2. As an infinitive phrase -- "To find ways to reduce the cost of mower maintenance so as not to exceed \$266.00 for the remainder of fiscal year 1966."
3. As a statement of need -- "We need to reduce the cost of mower maintenance so as not to exceed \$266.00 for the remainder of fiscal year 1966."

Do not express the statement of the problem as a fact.

Here are two statements of the problem. Tell us what is wrong with each of them.

1. To find ways to reduce the cost of mower maintenance so as not to exceed \$266.00 for the remainder of fiscal year 1966. This is a necessary economy move required by the cost reduction program.

This statement of the problem is incorrect because _____

2. There is a way to reduce the cost of mower maintenance so as not to exceed \$266.00 for the remainder of fiscal year 1966.

This statement of the problem is incorrect because _____

The first statement is incorrect because it contains a short discussion. The last statement is incorrect because it is a factual statement.

1. PROBLEM: _____
2. ASSUMPTIONS:
 - a. _____
 - b. _____
3. FACTS BEARING IN THE PROBLEM:
 - a. _____
 - b. _____
 - c. _____

Parts 2 and 3 of the staff study report include those assumptions and facts that you have determined to be relevant to the problem solution.

Any assumptions necessary for a logical discussion of the problem are included in part 2. The assumption, while not a fact, must at least have a basis or foundation of fact.

Paragraph 3 contains statement of undeniable fact having influence on the problem or its solution. Care is exercised not to include any unnecessary facts since they only serve to confuse the insure being discussed. Definitions and criteria are also included in part 3; "Facts Bearing On the Problem".

The following are statements of either assumptions, facts, or criteria. In the space provided, describe what each statement is and in which paragraph (2 or 3) of the staff study it would go.

1. Criteria; para 3 The grass will be maintained in well kept condition.
2. Assumption; para 3 There must be an effective way to control the abuse the mowers are receiving.
3. Assumption; para 1 If the current repair rate continues, the cost of power mower maintenance for fiscal year 1968 could exceed \$1200.00.
4. Criteria; para 2 No new mowers can be purchased.
5. Fact; para 3 The total cost of mower maintenance for fiscal year 1965 was \$855.00.

Check your responses to the preceding exercise. The first statement is a criterion item and would go in paragraph three. The second is an assumption as well as is number three. Both would be in paragraph two. Number four is a criterion item and number five is a fact. Both statements would be in paragraph three.

3. FACTS BEARING ON THE PROBLEM:

a. _____
_____.

4. DISCUSSION:

a. _____
b. _____
_____.

It is in this section that you report the logic that you used in solving the problem. You can provide background material here because it is important that you communicate to your reader how you solved the problem and why you solved it the way that you did. This background material can be as long as you desire to make it, but in a lengthy or complicated staff study it is best to make this a summary with the details included in a discussion annex.

This section will follow one of three patterns:

1. The single possible solution pattern
2. The single best possible solution pattern
3. The combination of possible solutions pattern

The following are descriptions of these three patterns of the discussion section. Read each description and match that description with one of the three numbers above. Do this in the space preceding each description.

_____ In this pattern, you:

- a. List all of the possible solutions in which your commander might be interested.
- b. Show how each of these possible solutions was tested against each of the criteria as well as against each other.
- c. Indicate the best possible solution to the reader.

In this pattern, you:

- a. List all of the possible solutions in which your commander might be interested.
- b. Show how each of these possible solutions was tested against each of the criteria as well as against one another.
- c. Give your reasons for retaining parts of certain solutions and show how these parts will contribute to the final solution.
- d. Show the reader how and why you have combined these parts of certain solutions to derive the final solution.

 In this pattern, you:

- a. List a single possible solution.
- b. Show your reader how this solution meets or fails to meet each of the criteria.
- c. Show how and why this single solution will solve the problem.

Your responses, in order, should have been two, three, and one. Pattern two, the single best possible solution pattern, is the one that you will use most.

CONCLUSION SECTION

7. _____
8. _____

CONCLUSION:

9. _____
10. _____
11. _____

The purpose of this section is not to conclude the report but to save the reader time. He may not have time to read the discussion section, so this section must not be a continuation of that section. The reader must be able to read the problem section, read the conclusion section, and understand thoroughly how the conclusion satisfies the problem. For this reason, the conclusion must provide a complete and workable solution to the problem.

Which of the following is an example of an acceptable conclusion? Check the response of your choice.

1. The best possible solution to the problem would be to establish a temporary maintenance facility in Building 917 and allow qualified off-duty personnel to maintain the mowers using Army parts and equipment. The personnel so engaged will be paid at the rate of \$1.50 per hour.

2. We have seen, in the discussion section of this report, how several solutions were considered and rejected. From this, it would appear that the best possible solution to the problem would be to establish a temporary maintenance facility in Building 917 and allow qualified off-duty personnel to maintain the mowers using Army parts and equipment. The personnel engaged will be paid at the rate of \$1.50 per hour.

3. The best possible solution to the problem would be to establish a temporary maintenance facility in Building 917 and allow qualified off-duty personnel to maintain the mowers using Army parts and equipment. The personnel so engaged will be paid at the rate of \$1.50 per hour. In addition to providing deserving personnel with additional funds, this solution would serve as an effective morale builder. It would provide the men with training in a needed skill.

Choices two and three are not acceptable conclusions. In the spaces below, describe what is wrong with these choices.

Choice two is unacceptable because _____

Choice three is unacceptable because _____

You should have described choice two as unacceptable because it is a continuation of the discussion section. Choice three is unacceptable because it introduces new material not required in the problem solution. Let us now move to the Action Recommended section which is the last step in completing the staff study.

ACTION RECOMMENDED SECTION

7. _____
8. _____

CONCLUSION:

9. _____

ACTION RECOMMENDED:

10. _____
11. _____

This section tells the reader what action should be taken and provides the reader with the means to take this action. The means to take this action may be in the form of directives, regulations, etc. that are prepared and require only the reader's signature. Since you are committing yourself to the single line of action that you judge to be the best, alternative recommendations should not be made. You are putting your professional judgment squarely on the line.

Which of the following is the best example of an action recommended section? Check the response of your choice.

1. The Post Engineer will establish a temporary maintenance facility for the repair of power mowers in Building 917, and will insure, through the facilities branch of that organization that the building is prepared for this activity. The Post Fire Marshal will inspect the premises for potential fire hazards and will appoint a fire monitor who will insure that adequate fire protection devices are installed for Class A and Class C fires.

The administrative services branch of this headquarters will advertise for qualified off-duty personnel to participate in this activity. Subject advertising will be in the Daily Bulletin on three consecutive days commencing 1 Dec 66 and will be in the form of attachment three to this report. Organizational commanders of this post will encourage qualified personnel to participate in this activity insofar as this participation does not interfere with the performance of assigned duties.

In the event that an insufficient number of personnel express an interest in this activity, the Post Purchasing Contracting Office is authorized to negotiate a contract between U.S. Army and Mr. Wilfred S. White of 3310 Decatur Street for these services. A copy of this contract is attached as attachment five to this report.

2. The Post Engineer will establish a temporary maintenance facility for the repair of power mowers in Building 917 and will insure, through the facilities branch of that organization, that the building is prepared for this activity. The Post Fire Marshal will inspect the premises for potential fire hazards and will appoint a fire monitor who will insure that adequate fire protection devices are installed for Class A and Class C fires.

The administrative services branch of this headquarters will advertise for qualified off-duty personnel to participate in this activity. Subject advertising will be in the Daily Bulletin on three consecutive days commencing 1 Dec 66 and will be in the form of attachment three to this report.

Organizational commanders of this base will encourage qualified off-duty personnel to participate in this activity insofar as this participation does not interfere with the performance of assigned duties.

While no attempt has been made to make the above action recommended section typical of those found in a polished staff study report, you should have recognized number two as the correct choice. Number one is unacceptable because it contains an alternative recommendation. To include such an alternative is indefensible since your initial fact finding would have indicated whether or not sufficient talent is available.

To list only one recommendation in the "Action Recommended" section means that you have committed yourself to the line of action you think best, thus completing staff action. Staff action would not be complete if the commander had to do more than sign your report into action if he approves.

When writing a staff study report and there is no information for a specific paragraph, such as "assumptions," then the paragraph is omitted and no reference is made to it.

ANNEXES TO THE STAFF
STUDY REPORT

THERE ARE so many kinds of annexes to a staff study report that we cannot possibly cover them all here. You learned from previous discussions in this text that one of the following statements is true. Check the true statement.

1. Annexes to a staff study report are only those documents that will clarify or amplify points made in the body of the staff study report.

2. Annexes to a staff study report are those documents that will clarify or amplify points made in the body of the staff study report as well as those documents required to implement the recommended action.

Number two is the correct choice. Not only will the annexes contain such documents as extracts of regulations, maps, photographs, policy letters, etc., but the annexes will also contain all the letters, directives, etc., that will put the recommended action into operation.

Remember this rule:

Completed staff work requires that the commander need only sign the previous prepared documents to initiate the action.

This concludes this portion of the text. We hope that you have profitted from it. A short review follows.

REVIEW OF THE BODY
OF THE STAFF STUDY REPORT

AS A BRIEF review and as a measure of what you have learned about the body of the staff study report, answer each of the following questions by placing a check mark in the space provided beside that response you believe to be correct. You may check your responses at the end of this review.

1. The body of the staff study report begins with which of the following?

a. A listing of the facts, assumptions, and criteria that are relevant to the problem.

b. The place where the problem is stated in one of three ways; as a question, an infinitive phrase, or a statement of need.

2. Which of the following is included in the discussion section?

a. All recommendations for putting the solution into action.

b. The logic that was used to select the best solution.

c. A list of all the factors that had a bearing on the problem.

3. The purpose of the conclusion section is to provide a place for which of the following?

a. New material to be introduced to satisfy the needs of the problem.

b. A brief restatement of the best possible solution to the problem.

c. A listing of the ways to implement the problem solution.

4. The last section of the body of the staff study report is the section in which you report which of the following?

a. Conclusions to the problem.

b. Action necessary to implement the solution.

c. Alternative courses of action.

5. The statement of the problem should be placed in which section?

- a. The heading of the report.
- b. The ending of the report.
- c. Neither the heading nor the ending of the report.
- d. Both the heading and the ending of the report.

6. Any one of three patterns is recommended for the discussion section of the report. Which of the following contains the three patterns?

- a. Single possible solution, all possible solutions, and a maximum of three possible solutions.
- b. A combination of possible solutions, a brief statement of the conclusion, and the single best possible solution.
- c. Single best possible solution, combination of possible solutions, and a single possible solution.

7. Annexes may contain documents required to implement the recommended action as well as information used to clarify specific points.

- a. True
- b. False

Here are the correct answers for the preceding review exercise:

1. b
2. b
3. b
4. b
5. c
6. c
7. a

Turn the page and complete the self evaluation exercise.

SELF EVALUATION EXERCISE
CREATIVE PROBLEM SOLVING AND SOLUTION REPORTING

1. Identify the statement below that contains the three elements of a problem.

a. An individual, an obstacle, a regulation.
 b. An individual, an obstacle, a defined goal.
 c. An individual, a defined goal, an objective.

2. Which of the following is one of the correct ways to make a tentative statement of the problem?

a. As a statement of fact.
 b. As a statement containing a criterion element.
 c. As a question.

3-10 Match the items on the right with the statement on the left. Each statement may be used more than once, but only one item will be matched with each statement.

C 3. "I came up with this solution and I intend to see that it is accepted". BARRIERS TO CREATIVE THINKING

A 4. Captain Wall wants new suggestions provided they do not require a lot of time and effort.

a. Habit
b. Fear
c. Prejudice
d. Inertia

A 5. The reluctance to change from old and accepted ways of doing things.

A 6. "I must be careful not to present ideas that the OLD MAN won't like."

A 7. "I won't present my idea in staff meeting since it is controversial."

A 8. "As usual, we shall deny entry to those who come after the stadium is filled."

C 9. "Don't give Major X's suggestion any consideration; he's never had a good one yet."

A 10. "Why change? The workers are happy and besides, it would require a lot of work."

✓ 11. Identify the item below that contains the three ways in which a tentative statement of the problem can be expressed.

a. As a question, as a statement of need, or as an adverbial phrase.

b. As an infinitive phrase, as a statement of need, or as an opinion.

c. As a statement of need, as a question, or as an infinitive phrase.

d. As a question, as a interrogative, or as a statement of need.

12. Brainstorming is a group ideation technique.

a. True

b. False

13-18 Match the items on the right with the statements on the left. Each item may be used more than once, but only one item will be matched with each statement.

d 13. To create a chain reaction where one idea suggests another.

RULES FOR BRAINSTORMING

a. Withhold judgment.

b. Encourage freewheeling.

c. Aim for quantity, not quality.

d. Hitchhike ideas.

A 14. This rule is in evidence once the flow of ideas has started and the leader allows the group to continue under its own steam with little or no guidance.

a 15. This rule is being broken if any idea is discarded before the session ends.

C 16. Even though some suggestions might not be good, the leader should get as many as he possibly can from the group.

C 17. "Your suggestion reminds me of another idea that might solve the problem."

a 18. Never allow an idea to be ridiculed. It might be the best one of all.

19. What would you do if you had two problem solutions that equally satisfy the established criteria?

a. Arbitrarily select one of the solutions.

b. Establish additional criteria.

c. Let the commander select the solution he thinks is best.

d. Discard both solutions and use the next best one.

20. After going through the problem solving process and arriving at a solution, you must report your findings to the commander.

a. Do the above by notifying the commander that you have solved the problem and will implement the solution immediately.

b. Do the above by submitting a detailed report of your findings with provisions for him to either approve or disapprove your recommendations.

21. The yardstick by which you want to measure each of the possible solutions to a problem is which of the following?

a. The expected acceptability of the solution to your superiors.

b. The acceptability of each solution in accordance with current directives.

c. The requirements of the problem that the solution must satisfy.

d. The similarity of this solution to previous solutions for like problems.

22-29 Select the step of the problem solving sequence listed in the column on the right which matches the description or statement on the left.

Know the problem
Define the problem
Select a solution
Gather data
Test possible solutions

22. This step should represent completed staff work. a. Select the best solution to the problem.

23. "This solution doesn't meet all of the established criteria." b. List possible solutions to the problem.

24. Make a tentative statement of the problem. c. Recognize the problem.

25. A continuing process that begins with the recognition that an obstacle exist and ends when the final solution is implemented. d. Implement the solution.

26. "Solution four is the only one that satisfies all criteria in this particular case." e. Gather data relative to the problem.

f. Test possible solutions to the problem.

27. Creative thinking (brainstorming), logical thinking and experience all contribute to this step.

28. This step is the most critical one in the problem solving sequence.

29. If more than one solution meets all criteria then additional criteria should be established to accomplish this step.

30. When preparing a staff study report, what should you do if you do not have any assumptions to list?

a. Write the phrase "none were used" in the appropriate space.

b. Enter N/A as appropriate.

c. Draw a line through the word "Assumptions."

d. Omit and make no reference to it.

31. In a staff study report, which of the following is true of annexes?

a. They are used to present documents that will clarify or amplify points made in the body of the staff study report.

b. They must be limited in number to prevent the report from being too bulky.

c. They are used to present those documents required to implement the recommended action.

d. a and c

e. a and b

32-39 The body of the staff study report contains six section which are listed on the right below. Match each section with the appropriate statement on the left.

under the front

32. Here is the place where you will restate the best possible solution. The purpose for this is to save the reader time.

33. In this section, you report the logic used in reaching the conclusion.

34. This section is used to list the evidence which supports the solution that you are preparing for the commander.

	SECTIONS
a.	Problem
b.	Assumptions
c.	Factors bearing on the problem.
d.	Discussion
e.	Conclusion
f.	Action recommended

a 35. We need to find a way to reduce the traffic congestion between 1630 and 1700 hours at the Day Street Gate.

f 36. This section tells the reader what action should be taken and provides him with a means to take this action.

C 37. How can we reduce the cost of supplies without jeopardizing our superior quality of production?

f 38. Completion of this section represents completed staff work.

f 39. Although not a fact, it has the basis or foundation of a fact and is necessary for a logical discussion of the problem.

ANSWER KEY TO REVIEW QUESTIONS

1. b
2. c
3. c
4. d
5. a
6. b
7. b
8. a
9. c
10. d
11. c
12. a
13. d
14. b
15. a
16. c
17. d
18. a
19. b
20. b
21. c
22. d
23. f
24. c
25. e
26. a
27. b
28. c
29. a
30. d
31. d
32. e
33. d
34. c
35. a
36. f
37. a
38. f
39. b

3 parts of problem

6 steps

4 problem fear, anxiety.

6. parts of step study

Brainstorming 4 steps