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MEMORANDUM FOR: Under Secretary of Defense for Acquisition, Technology, and
Logistics
Joint Chiefs of Staff, Director for Logistics, J-4

Subject: Operational Contract Support Initial Capabilities Document

The Joint Requirements Oversight Council (JROC) reviewed and approves the
Operational Contract Support Initial Capabilities Document with a Joint Potential
Designator of "JROC Interest."

A handwritten signature in black ink, appearing to read "J E Cartwright", written over the printed name and title.

JAMES E. CARTWRIGHT
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INITIAL CAPABILITIES DOCUMENT
FOR
OPERATIONAL CONTRACT SUPPORT (OCS)

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1. Concept of Operations Summary. Operational Contract Support (OCS) may enable operational outcomes using contracted solutions (contracts and contractors) to support joint force commanders during contingencies. Achieving operational outcomes through OCS require synergy among functional areas: institutional/capacity building, OCS program management (PgM),¹ requirements definition (RD), contract support integration (CSI), and contractor management (CM). OCS depends on strong governance, continuous reporting, full coordination, and adequate oversight. OCS must be managed, maintained, and transitioned before, during, and after a contingency. The required capabilities to support OCS either do not exist or are deficient. Requirements contained in federal statute and generated by operational experience have identified myriad shortfalls. Use of and need for OCS at the tactical level tends to increase over the duration of a contingency operation, peaking during phases III (dominate), IV (stabilize), and V (enable civil authority) of an operation. Further insights into how OCS supports military missions are captured in Joint Publication 4-10, the OCS Concept of Operations (CONOPS),² and highlighted in paragraph 2 of this document; the OCS operational view (OV-1) illustrates the players and activities by echelon (reference appendix A).

- a. Outcomes provided. OCS generates contracted support and augments force structure in contingency operations that support military missions at all echelons. Strategically, OCS provides global response and freedom

¹ Program management = the ability to enable the planning, organizing, staffing, controlling, and leading the OCS efforts to meet the Joint Force Commander's objectives.

² OCS CONOPS available at http://www.acq.osd.mil/log/PS/cio/OCS_CONOPS_v8Jun2010.pdf.

of action, an agile force structure, access to commercial assets and specialized skill sets, a non-military force option, and reduced military operations tempo. It may also provide shorter supply chains, increased readiness, a deterrent to insurgency, and an increased labor pool. Operationally, OCS provides support to military forces, stimulates host nation economic stability, builds partner capacity,³ improves civil-military relations, and enhances unity of effort among whole-of-government (WoG), host nation, and coalition partners. Tactically, OCS may enable operational access and battlespace awareness, including weather and terrain conditions for friendly forces. It also may deny the enemy freedom of action and battlespace awareness and help isolate the adversary.

- b. Effects required. To achieve the above outcomes, OCS must be effective and efficient. To be effective, OCS must be visible, accountable, integrated across joint capability areas and staff functions, and synchronized within the Department and among partners. To be efficient, OCS must leverage economies of scale, minimize or eliminate competition among requiring activities, reduce complexity, and lighten contract support burdens.
- c. Complement to the Joint Force. OCS facilitates the integration of contracted support among the military services, WoG, and multinational (MN) partners in support of contingencies to deliver maximum benefit at minimal cost. Contingency requirements have expanded to include numerous complex tasks beyond planned military service-level missions, capabilities, and training. For example, contracted support provides more than three-fourths⁴ of the joint logistics support required by current military operations (OIF, OND, and OEF⁵). These contracts provide logistics base support services, including operation of dining facilities, purification of water, testing and distribution of fuel, sheltering of soldiers and civilians, and disposal of solid and liquid waste and hazardous materials. Beyond logistics, OCS provides critical functional support, including linguists and interpreters, report writers, public affairs, capacity development, and information technology technicians. It supports the building of partnership capacity to isolate the adversary and achieve the commander's intent.

³ Capacity = the ability of individuals, institutions, and societies to perform functions, solve problems, and set and achieve objectives in a sustainable manner.

⁴ Interim findings from the Chairman of the Joint Chiefs of Staff Dependence on Contractor Support in Contingency Operations Task Force report, *Phase II: An Evaluation of the Range and Depth of Service Contract Capabilities in Iraq*, March 30, 2010, Final Draft.

⁵ OIF = OPERATION IRAQI FREEDOM; OND = OPERATION NEW DAWN; OEF = OPERATION ENDURING FREEDOM.

- d. **Enabling capabilities.** To achieve the required outcomes and effects described above, and in coordination with the vision articulated in the OCS CONOPS, multiple capabilities beyond OCS must be addressed. Based upon force structure and requirements analysis, DoD must establish an OCS human capital strategy for military (active and reserve), civilian, and contractor forces. Success also requires a maturity of OCS that includes a more evolved universal joint task list (UJTL), force development that includes prepackaged contract capabilities (e.g., UTCs⁶), availability and responsiveness reporting, and institutionalization of OCS in DoD processes (POM, CD&E, etc.⁷). As part of the Total Force, OCS considerations must be integrated in and across all functional areas and primary and special staff sections, from planning (e.g., JOPES⁸) through execution (i.e., deployment and redeployment using TPFDD⁹ to, from, and within the operational theater), and in governance and reporting processes (e.g., lessons learned, AARs¹⁰). Commanders must be educated on the use of contracted support, and requiring activities must be responsible for requirements development and management. Early involvement of auditing activities should be used to enhance financial stewardship, ensure compliance with regulations, and mitigate corruption. In addition, convergence and coherence must be achieved with joint, DoD, WoG, and coalition (MN, intergovernmental) partners, and potentially non-governmental organizations. Adopting and implementing a WoG approach should include the planning for and use of facilities (e.g., construction and their use and management) during contingency operations; reconstruction support (agriculture, finance, energy, transportation, law enforcement, etc.), the provision of a civil structure to govern communities in a contingency environment, and integration with the government-wide Contingency Contracting Corps (CCC) and Department of State's Civilian Reserve Corps (CRC) and Response Readiness Corps (RRC).

2. Joint Capability Area. Operational Contract Support (JCA 4.5) is defined as the ability to orchestrate and synchronize the provision of effective and efficient contract solutions to achieve operational outcomes and support for whole of government and mission partners in contingency operations. OCS spans all planning phases (0–V) across the range of military operations (ROMO). OCS supports joint operating concepts (JOCs): major combat operations (MCOs); homeland defense (HD) and civil support (CS); military support to stabilization, security, transition, and reconstruction (SSTR); irregular warfare (IW);

⁶ UTCs = unit type codes.

⁷ POM = program objective memorandum; CD&E = concept development and experimentation.

⁸ JOPES = Joint Operation Planning and Execution System.

⁹ TPFDD = time-phased force deployment data.

¹⁰ AARs = after action reports.

deterrence operations; and military contribution to cooperative security.¹¹ OCS can be a significant enabler during MCOs and SSTR operations. Execution of these concepts during operations in Iraq and Afghanistan—where contractors comprise at least half the Total Force—provided a realistic, valuable venue for assessing the functions, needs, and potential solutions required to effectively and efficiently conduct OCS. To overcome urgent shortfalls identified during current operations, the timeframe assumed for the OCS analysis was near-term to mid-term (through 2016).

3. Required Capability. Review of OCS, as a Department of Defense core competency, is directed by federal statute.¹² To support this requirement, the OCS community of interest (COI) conducted a capabilities-based assessment (CBA), the outputs of which are included in the text of this document. OCS supports the *National Security Strategy* (NSS), *National Defense Strategy* (NDS), *Quadrennial Defense Review* (QDR), *Guidance for Development of the Force* (GDF), *Capstone Concept for Joint Operations* (CCJO) –defined categories of military action—combat, security, engagement, and relief and reconstruction—and all Unified Command Plan– (UCP-) assigned missions. The functions required to execute OCS—institutional/capacity building, OCS PgM, RD, CSI, and CM—are further defined in the OCS CONOPS and JP 4-10. During the OCS CBA, a functional decomposition of OCS was conducted to determine the functions needed to plan, execute, and manage OCS and better understand the requirements dictated by federal statute and lessons learned from past operations. The major OCS functions (summarized below) are further decomposed at Appendix D with specific tasks:

- a. Institutional/capacity building. At the strategic national level, the DoD requires policy, doctrine, and processes that generate 1) a unified OCS strategy across the DoD and with interagency (IA) and MN partners; 2) sufficient OCS capacity (trained and experienced contracting and requiring activity personnel) that is aligned with DoD policy for force mix of military, civilian, and contractor personnel; and 3) measurable tasks (i.e., UJTLs), which require readiness reporting to drive force development and capital investment. The strategic national echelon must monitor, champion, and enable holistic solutions for OCS capabilities; ensure funding is available; and institutionalize OCS throughout DoD. The primary focus on strategic national activities is to enable or create the capability and capacity at the combatant commander (CCDR) level to plan, organize, staff, monitor, control, and lead OCS effectively and efficiently across the theater.

¹¹ Reference Section IV. (Strategic Context) of the OCS CONOPS (located at http://www.acq.osd.mil/log/PS/cio/OCS_CONOPS_v8Jun2010.pdf) for specific relationships to all JOCs.

¹² *National Defense Authorization Act (NDAA) Fiscal Year (FY) 2008*, Sections 941 and 942.

- b. OCS program management. PgM facilitates responsive, coordinated action, thus enabling OCS to meet mission objectives in a timely manner at all echelons. At the strategic national level, the DoD requires integration of OCS in training and exercises, across joint functions, and with joint and mission partners. It is also necessary to collect lessons learned that may drive continuous improvement. At the strategic theater echelon, CCDRs require the capabilities to plan, organize, staff, monitor, control, and lead OCS effectively and efficiently.
- c. Requirements definition. Requiring activities must manage requirements, oversee contractors, and integrate OCS into their operations. RD involves the development, coordination, approval, and prioritization of contract requirements. Operational ownership of requirements, from generation to contract close out, including monitoring contractor performance and providing contractor support, ensures contract solutions achieve the intended operational outcomes.
- d. Contingency contracting. Operationally and tactically, contingency forces require contracting capabilities that deliver integrated contracted support—among systems, external, and theater support contracting organizations—to satisfy the needs of commanders in coordination with military service, IA, and MN partner contract providers. This function executes, manages, tracks, and oversees contingency contracts.
- e. Governance and reporting. At each echelon, governance provides guidance, policy, reporting requirements (measures), oversight, and resources to facilitate execution at lower levels. Conversely, reporting begins when the lower echelons implement OCS, provide metrics, identify lessons and issues, and generate reports (e.g., after action reports and SITREPS) that are sent back up the chain. The flow of information between echelons (reference Appendix A) enables visibility and accountability, elicits command and control, and promotes issue resolution and process improvement.
- f. Contract support integration. CSI is the coordination and synchronization of contracted support executed in a designated operational area in support of the joint force. Contracted support is delivered to the joint force through a process of key tasks: planning, requirements determination, contract development and execution, and contract closeout.
- g. Contractor management. CM is the ability to manage and maintain visibility of contractor personnel and associated contractor equipment providing support to the joint force in a designated operational area. It is closely related to, but not the same as, contract administration. CM is an expansive and complex process. It includes both the management of

contractor performance in complying with contractor personnel-related requirements and the management of the government's responsibilities for life and other support when such support is required by the JFC and has been incorporated into the terms and conditions of applicable contracts. The CM process is composed of five key steps: planning, predeployment actions, deployment and reception, in-theater management, and redeployment, especially as described in Department of Defense Instruction (DODI) 3020.41, *Contractor Personnel Authorized to Accompany the US Armed Forces*, and its associated references.

- h. The OCS-required functions (a–g above) comply with public law (e.g., NDAA's, U.S. Code), map to joint doctrine, leverage PgM best practices, and address lessons learned from current operations. Current policy (DoDD 3020.49, signed out by the Deputy Secretary of Defense) provides guidance from OSD on federal statute, while Joint Publication 4-10 provides joint doctrine. Strategic guidance and doctrine (e.g., NDS, QDR, GDF, CCJO, GEF, and JSCP) recognizes the importance of contractors as a component of the Total Force. It is essential to integrate OCS capabilities in DoD, among the military services, across the federal government, and with our MN partners. Integration will facilitate unity of effort, preclude excessive spending, and simplify the use of contract solutions in supporting the mission and all partners. The prioritized capability attributes for OCS are defined at Appendix E.

4. Capability Gaps and Overlaps or Redundancies

- a. OCS capability gaps affect other functions (those beyond logistics) and JCAs to varying degrees (e.g., the vast majority of interpreters) in current operations. These gaps in OCS capabilities also will negatively impact future operations that require contracted support. Any lack of OCS capabilities impacts all staff functions (Personnel, Intelligence, Operations, etc.) because OCS spans multiple JCAs (e.g., building partnerships, force support) and all phases of the operation (including phase 0). OCS tasks and shortfalls were identified from law, strategic guidance, policy, doctrine, reports, and lessons learned from operations and exercises. During the OCS CBA, the COI identified the following prioritized tasks, which must be completed to support the OCS functions (identified in the previous section) and which require the most urgent attention:
 1. *Integrate OCS into operations.* OCS must be integrated in mission planning, deployment, execution, and command decisions. OCS delivers strategic, operational, and tactical outcomes that, when responsive to contingency battle rhythms, provide commanders flexible options, including non-military force capabilities, to achieve commander goals.

2. *Institutionalize OCS.* OCS must be integrated into DoD processes and staff functions. OCS UJTLs should drive reporting, force development, and resourcing for this core DoD capability. Readiness reporting for OCS capabilities will improve understanding and application of this capability during training and contingency operations.
3. *Staff for OCS.* Developing and maintaining OCS capabilities at all levels includes recruiting and retaining personnel (e.g., contracting officers, OCS planners, requirements developers, CORs¹³) to perform the functional roles of OCS, including all tasks for institutional/capacity building, PgM, RD, CSI, and CM. These personnel must then be trained to proficiency (individually and collectively), developed, and deployed to support operations. Total force mix is driven by strategic planning but refined by operational requirements.
4. *Plan for OCS.* OCS planning continues to evolve, but it is currently a task pursued by a coalition of the willing; it is not programmed, resourced, or integrated sufficiently as a core capability. OCS must be integrated across staff functions for phases 0 through V during contingency and crisis action planning. OCS planning requires consideration of roles and coordination between the military services and partner contracting organizations, deployment and in-theater contractor support (i.e., GFS¹⁴), contract oversight, entrance/exit processing and procedures, and reporting.
5. *Monitor OCS.* Personnel, processes, and tools should provide battlespace awareness of OCS solutions (i.e., contracts) as well as capacity for generating solutions (rules, tools, and processes). Efforts to monitor OCS should also satisfy legal and regulatory requirements associated with visibility and accountability of contracted solutions.
6. *Lead OCS.* Leading OCS involves designation of a lead to foster collaboration among various organizations (internal and external to the theater and DoD). This task requires definition of a theater acquisition strategy that includes OCS objectives in support of mission requirements and performance measures to guide future decisions. OCS leadership must assess and advise the CCDRs on risk, opportunity, resources, communication, transition, improvement, and issues among multiple joint operations areas (JOAs).
7. *Integrate common contract support.* Integrating common contract support requires awareness of OCS capabilities, limitations, and restrictions among partner organizations to preclude competition between requiring activities, to leverage economies of scale, to

¹³ CORs = Contracting Officer Representatives

¹⁴ GFS = government-furnished support.

minimize redundancy, and to improve effectiveness. Integration of common contract support capitalizes on best-of-breed solutions and promotes unity of effort among partners.

8. *Conduct contingency contract administration services (CCAS).* Requiring activities and contracting offices must be involved in the conduct of CCAS. Requiring activities must ensure a sufficient number of assigned and trained personnel (i.e. CORs and receiving officials) are available to assist in contract oversight. The JFC and service component commands are responsible for ensuring adequate numbers of CCAS personnel (e.g., ACOs, QARs, PAs, and subject matter experts)¹⁵ are available to meet operational requirements. Under certain circumstances, this may require the establishment of a theater-wide contract administration (TWCA) process to ensure implementation of optimal CCAS solutions at the contract level, formally definition of the roles of key TWCA CCAS players, and standardized reporting and oversight.
9. *Develop requirements package.* Development and coordination of requirements packages remains a non-standard, manual practice that is not well defined, understood, or implemented. Lack of proficiency causes delays and errors in generating contracted support to meet operational requirements. Requiring activities must maintain proficiency in generating acquisition-ready packages. Ad hoc requirements must be rapidly coordinated to enable integration of common contract solutions and ensure timely delivery.
10. *Manage contractors.* Management of contractor personnel and equipment is a major task that requires significant coordination among multiple staffs and organizations. A key challenge is the lack of a primary or special staff officer to lead CM planning and integration. Such responsibilities cross all primary and special staff functional lanes. CM subtasks include verifying clearances, coordinating deployments, maintaining contractor accountability, establishing base access and security controls (currently not standardized across geographic locations), providing force protection, coordinating movement control, providing government-furnished support (GFS), establishing standards and procedures that ensure contractor discipline, defining rules for the use of force (RUF), investigating incidents involving contractors, disciplining contractors, and controlling government-furnished equipment (GFE) and contractor-acquired, government-owned (CAGO) material.

¹⁵ ACO = administrative contracting officer, QAR = quality assurance representative, PA = property administrator.

During the OCS CBA, the above tasks were all assessed and found to be deficient. Either the ability to perform these tasks did not exist, existing performance levels lacked proficiency (i.e., cannot accomplish the mission to the level expected), capabilities were insufficient (force shortages or other commitments), or performance or completion required policy changes. (Table 1 characterizes these shortfalls). Additional tasks and subtasks were identified during the CBA; however, they were not prioritized as urgent, and thus excluded from this document. Given the broad and far reaching scope of the shortfalls and their second- and third-order effects, applying a program management approach at the most senior levels in DoD is essential.

- b. Based on the OCS functions (i.e., institutional/capacity building, OCS PgM, RD, CSI, CM) and the 10 tasks listed in paragraph 4.a., the COI identified 10 critical capability gaps during the OCS CBA. These ten critical capability gaps correspond to the tasks in paragraph 4.a.
 1. The DoD and joint force (JF) lack sufficient ability to leverage the full potential of OCS because of insufficient awareness and appreciation for the significance and complexity of OCS.
 2. The DoD and JF lack the ability to fully integrate OCS into capability and task planning, operational assessments, force development, training, readiness reporting, lessons learned, and continuous process improvement.
 3. The DoD lacks a human capital strategy—recruit, train, track, and retain—for all OCS functions, which encumbers deployment and staffing for the JF and complicates execution of OCS and compliance with legislation and regulation.
 4. The JF lacks the personnel, rules, tools, or processes to integrate OCS into theater plans across all phases (including IV and V), all directorates (J-staff functions), and with our partners (IA, MN).
 5. The JF lacks sufficient ability to visualize, track, and monitor the types, location, and status of OCS capabilities in theater.
 6. The JF lacks sufficient leadership oversight and awareness to address risk, opportunities, resources, communications, transitions, improvements, and inter-contingency issues associated with OCS.
 7. The JF lacks the ability to identify existing contract vehicles and capabilities by region and direct integration of common contract support.

- 8. The JF lacks sufficient capacity to effectively administer, oversee, and close contracts to ensure contractor performance is properly tracked/accessible and desired outcomes are achieved.
- 9. The JF lacks a common capability to simply, rapidly, and accurately generate and coordinate (including deconflicting and prioritizing) acquisition-ready requirements packages.
- 10. The JF lacks a common means to identify contractors and control base/post access across all geographic locations.

Current initiatives by the services and combatant commands to satisfy some of these gaps could result in additional redundancies if joint solutions are not adopted to satisfy the universal shortfalls. Developing standard solutions will accelerate U.S. response to contingencies and preclude development of ad hoc capabilities.

- c. The attributes of OCS (reference Appendix E) were mapped to the required capabilities defined in Table 1. The attributes are listed for each capability, from most significant to least significant.
- d. The capabilities with gaps identified in Table 1 are listed in descending order from highest to lowest recommended priority. This prioritization is based on input from subject matter experts during the OCS CBA which considers impact to operations and prioritizes capabilities that address multiple tasks.
- e. Table 1 summarizes the urgent required capabilities identified during the OCS CBA and their relevant attributes. They are ranked by priority.

Table 1. Capability Gap Table (Tier 1 Logistics and Tier 2 OCS JCAs)

Priority	Capabilities	Metric	Minimum value
1	Provide OCS strategic communication and evolve strategy to leverage OCS		
	1) Responsiveness	Are OCS capabilities defined in a roadmap that supports the full range of contingency operations?	Y
	2) Attainability	Is OCS integrated in strategic guidance?	Y
	3) Flexibility	Is OCS doctrine/policy aligned with joint, interagency, intergovernmental, and multinational (JIIM) partners?	Y
	5) Sustainability	Is OCS represented at the appropriate level (e.g., GO/flag oversight in a theater of operations)?	Y

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Priority	Capabilities	Metric	Minimum value
2	Institutionalize OCS in DoD processes		
	1) Responsiveness	Percentage of OCS tasks defined in UJTLs.	95%
	2) Attainability	Is OCS integrated in the PPBE process?	Y
	5) Sustainability	Is OCS integrated into the training and lessons learned processes?	Y
	6) Simplicity	Is OCS integrated into the contingency acquisition process?	Y
3	Recruit, train, track, retain, and staff OCS functions		
	1) Responsiveness	Are all OCS functions defined in a human capital strategy?	Y
	2) Attainability	Percentage of OCS authorizations manned with trained personnel.	80%
	5) Sustainability	Are sufficient OCS positions established to ensure expertise is maintained?	Y
	6) Simplicity	Are special experience/skill identifiers used to track personnel expertise?	Y
4	Integrate OCS in staffs and planning		
	1) Responsiveness	Is OCS sufficiently defined and included in the deliberate and adaptive planning processes?	Y
	2) Attainability	Are OCS positions appropriately identified to ensure staff expertise?	Y
	7) Economy	Does OCS planning and coordination preclude competition for common support?	Y
	6) Simplicity	Are common/interoperable OCS tools used also ISO JIIM requirements?	Y
	8) Accountability	Are OCS requirements (# of contractors, military force, and GFS) accounted for in planning activities?	Y
5	Monitor OCS availability and responsiveness, and integrate OCS into the commander's decision processes		
	1) Responsiveness	Are OCS processes supportive of the operational battle rhythm decision processes?	Y
	2) Attainability	Are OCS solutions easily tracked by location and status?	Y
	3) Flexibility	Are OCS processes and solutions responsive to operational needs?	Y
	6) Simplicity	Can OCS be integrated within the operational COP?	Y
	8) Accountability	Are commanders considering OCS as a potential COA, and, if other COAs are selected, have they considered their impact on OCS?	Y

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Priority	Capabilities	Metric	Minimum value
6	Develop OCS theater strategy and manage OCS risk, opportunity, resources, communications, transitions, improvements		
	1) Responsiveness	Is there an OCS strategy developed at the theater level?	Y
	4) Survivability	Are OCS risks identified at the theater level?	Y
	2) Attainability	Is access to OCS sufficiently considered at the theater level?	Y
	3) Flexibility	Is there an OCS transition and improvement strategy considered at the theater level?	Y
7	Identify existing contract solutions by region and direct integration of common contract support		
	1) Responsiveness	Are JIIM contract solutions integrated into a database and searchable by region?	Y
	7) Economy	Are previous contract solution details (type, price, performance, etc) readily available?	Y
	6) Simplicity	Are existing contract solutions easily leveraged to meet ad hoc requirements?	Y
	2) Attainability	Is JIIM OCS command and control (C2) established to optimize access to contract solutions between external, systems, and theater support providers?	Y
8	Effectively administer, oversee, and close contracts and ensure desired outcomes are achieved		
	2) Attainability	Are sufficient personnel available to administer, oversee, and close contracted support?	Y
	1) Responsiveness	Are personnel trained to administer, oversee, and close contracted support?	Y
	3) Flexibility	Does OCS oversight ensure desired outcomes are achieved?	Y
	7) Economy	Are JIIM oversight capabilities and OCS processes sufficiently coordinated to minimize duplicity of OCS capabilities?	Y
9	Rapidly generate and coordinate acquisition-ready requirements packages		
	1) Responsiveness	Are standardized requirements packages available (including statements of work, independent government cost estimates, COR nominations, and funding sources)?	Y
	6) Simplicity	Are OCS tools available to aid in generating requirements packages?	Y
	3) Flexibility	Are general requirements packages easily modified to be theater- (contingency) specific and easily coordinated between requiring activities, commanders, contracting offices, etc.?	Y
	8) Accountability	Do requirements identify OCS requirements (# of factors and available GFS, military forces support like CCOs/CORs/SMEs)?	Y

Priority	Capabilities	Metric	Minimum value
10	Standardize identification of contractors and control of base/post access across all geographic locations .		
	3) Flexibility	Can contractors provide support across multiple locations using a single identification and authentication solution?	Y
	1) Responsiveness	Is contractor access to base/post controlled and standardized within/among AORs?	Y
	6) Simplicity	Are contractor access controls updatable for all locations, and can contractors easily comply with the requirements?	Y

5. Threat and Operational Environment. Although not a typical weapon system, OCS is conducted during contingencies in the operational area and does have traditional as well as unique threats associated with it.

- a. Operational environment. OCS links Business and Warfighting domains that support missions at all echelons (strategic national to tactical). OCS planning, execution, and transition occur in and through all phases (0–V) of an operation. It is also executed across the range of military operations and threats (permissive and non-permissive environments) around the world. Today, contracts support current operations and contractors work in the JOA to provide critical services. OCS must support dynamic, uncertain, complex (urban), dispersed (deployed and in-garrison), and continuous operations today and into the future.
- b. Joint operational environments. The military services and defense agencies provide contracted support to their own forces until the geographic combatant command (GCC) determines a joint solution is required (e.g., when a JTF is necessary or an IPC¹⁶ is established). Military departments must be capable of providing joint OCS organizational solutions (e.g., lead service or JTCC¹⁷) and integrating theater, systems, and external support contracts, as well as working with WoG, MN, and coalition partners to optimize and transition the use of OCS.
- c. Employment. As a component of the Total Force, contractor personnel often require force protection, movement control, and other GFS (e.g., billeting, messing, and medical). These requirements may be outsourced (i.e., included in the contract cost as part of the contractor-provided support) or provided by the government. Synchronization among requiring activities, contracting offices, theater personnel, and contractors requires significant coordination and information sharing. Use of contractors also introduces some unique threats (e.g., use of PCSs increases risk).

¹⁶ IPC = integration planning cell.

¹⁷ JTCC = joint theater contracting command/center (as directed by the CCDR).

- d. Threat. The capabilities (i.e., enablers) that support OCS, the realities of hostile environments in which OCS is employed, and vulnerabilities inherent to OCS make it susceptible to a multitude of threats and risks. Effective management of OCS as a core capability can mitigate these risks. Primarily, five areas must be protected from threats.
1. *Information systems.* The extensive coordination involved in OCS relies on the net-centric capabilities of the Global Information Grid (GIG), which is a potential target for adversary information operations attacks (as identified in the Defense Intelligence Agency's Information Operations Capstone Threat Assessment). While not a direct threat to OCS, threats to the communications infrastructure of the GIG may affect the ability of OCS systems to meet their mission requirements. OCS DOTMLPF1 solutions will address degraded environment, including consequences of severe weather, or attacks in accordance with CJCSI 6212.01 requirements. Information operations (IO) threats include physical attacks on OCS systems. While unlikely, radio frequency weapons could be used to disrupt or damage OCS systems' electronics, if an adversary is able to get the radio frequency weapon close enough to the targeted electronics.
 2. *Computer networks.* Access to information systems creates susceptibility to the insider threat, where a person with legitimate access to the system works (either intentionally or unintentionally) on behalf of the adversary. This inside access may provide them the opportunity to manipulate, disrupt, destroy, or exploit the data that resides on OCS systems. Also, computer network attacks (CNAs) by state and non-state actors may be conducted against OCS systems from anywhere in the world, during peacetime or wartime. Computer network exploitation (CNE) may be used to gather valuable intelligence from OCS systems. CNE will often be used to establish a presence on the targeted network and to facilitate CNA.
 3. *Contractor personnel.* Because contractors operate in the operational environment, they are susceptible to traditional lethal threats (e.g., CBRNE^[2]). OCS DOTMLPF solutions will address CBRN requirements in accordance with DoDI 3150.09.
 4. *The supply chain.* Another significant and unique vulnerability inherent with OCS stems from threats to the supply chain. Because OCS acquires civilian products, processes, and services to support military forces and achieve outcomes, it is susceptible to adversary influence. Substandard products (whether delivered through calculated adversarial intent or negligent commercial practice) pose a threat to the

^[2] CBRNE = chemical, biological, radiological, nuclear, and high yield explosives

joint force. Vigilance of contractor suitability likewise must preclude the employment of non-sympathetic civilians and inappropriate access to personnel, facilities, and information. Background investigations, biometric tools, and access controls must be implemented effectively to mitigate this risk.

5. *The budget.* Failure to integrate contracted support may escalate the costs to levels that are unsupportable. This threat also impacts unity of effort between the services and with interagency and coalition partners.

6. Ideas for Non-Materiel Approaches (DOTMLPF Analysis). During the CBA, the OCS community of interest (COI) identified policy, doctrine, organization, training, leadership and education, and personnel solutions that could partially overcome the identified OCS deficiencies. Facilities were considered and none were noted as OCS shortfalls. Integrated product teams (IPTs) manned by OCS COI organizations should be established to address the non-materiel approaches summarized below.

- a. Policy and doctrine. The alignment and expansion of policy (DoDDs, DoDIs, DFARS, CJCSIs, CJCSMs¹⁸) and doctrine (JPs, TTPs, handbooks, guides¹⁹), expansion and revision of UJTLs²⁰ to establish measures and standards that dictate reporting requirements for all OCS functions and communities, and development of agreements and common policy and doctrine for organizations external to the DoD are required to overcome shortfalls in OCS policy and doctrine and to achieve accountability. Specific issues and topics to be addressed in policy and doctrine revisions are identified at Appendix F.
- b. Organization and personnel. Organizational solutions for implementing OCS functions and development of contract packages, establishment and tracking of personnel solutions related to OCS, definition of personnel skills and qualifications, authorization and allocation of personnel, and OCS integration with IA and MN partner organizations and personnel are required to overcome capacity, coordination, and capability shortfalls associated with OCS. Organizational and personnel solutions that require resourcing, manning, and policy decisions are identified at Appendix G.
- c. Training, leadership and education. Certification and training levels and sources for OCS functions, tracking mechanisms for ensuring personnel are ready to perform OCS-related activities, integration of OCS into

¹⁸ DoDD = DoD directive; DoDI = DoD instruction; DFARS = Defense Federal Acquisition Regulation Supplement; CJCSI = CJCS instruction; CJCSM = CJCS manual.

¹⁹ JPs = joint publications; TTPs = tactics, techniques, and procedures.

²⁰ Current UJTLs and associated metrics are inadequate and should be updated.

individual training and leader education venues (e.g., PME,²¹ advisors, tools/system, and occupational specialties), integration of OCS in collective training venues (e.g., unit pre-deployment/readiness, military service, combatant command, WoG, and MN exercises or experiments), and the review and incorporation of lessons learned from the joint force or Service (JDG, JLLIS, CALL²²), WoG (CfCO²³), and MN (JALLC, ABCA²⁴) databases/sources are required to overcome existing shortfalls in training and leader education. Training and leader education audiences and issues are identified at Appendix H.

7. Final Recommendations. The OCS COI identified non-materiel approaches to address the following specific shortfalls: policy and doctrine; organization and personnel; and training, leadership, and education. Resourced IPTs reporting to the OCS Functional Capabilities Integration Board (FCIB) will be required to both develop DOTMLPF change recommendations (DCRs) and implement the following solutions to those shortfalls.

- a. Policy and doctrine. Update and align policy, doctrine, JCA definitions, corresponding UJTLs, and agreements (MOA/MOUs) to address shortfalls and discrepancies, address evolving areas of OCS, and promote convergence and coherence with WoG and MN partners.
- b. Organization and personnel. Establish a human capital strategy that incorporates all functions of OCS, validate the responsibilities and alignment of organizations to ensure sufficient capacity and capability to conduct the OCS mission, and develop contract package capabilities.
- c. Training, leadership, and education. Develop training and information-sharing roadmaps to include roles and responsibilities of OSD, Joint Staff, and Service organizations. Based on these FCIB-approved roadmaps, update training venues to incorporate OCS for all OCS functions in both acquisition and non-acquisition training, leadership, and education; and integrate OCS into DoD, WoG, and MN exercises and experiments.

In addition to the above non-materiel approaches, required materiel approaches were also identified. Materiel approaches involve the development or evolution of information systems. Any OCS system developed will comply with DoD, national, and international spectrum management policies and will

²¹ PME = professional military education.

²² JDG = Joint Doctrine Group; JLLIS = Joint Lessons Learned Information System; CALL = Center for Army Lessons Learned.

²³ CfCO = Center for Complex Operations.

²⁴ JALLC = Joint Analysis and Lessons Learned Centre; ABCA = American, British, Canadian, and Australian Armies' Program.

consider electromagnetic compatibility (EMC)²⁵ and information assurance (IA)²⁶ requirements. A strategic roadmap should be developed to identify the OCS capabilities (including existing and future systems) as well as an all view (AV-1) developed and registered in the DoD Architecture Repository System (DARS). New materiel approaches recommended to resolve the gaps are summarized below, with greater definition identified at Appendix I:

- d. OCS common operational picture (OCOP) capability—information system. An OCOP solution is required both to facilitate timely visibility and accountability of OCS capabilities and to inform command decisions.
- e. Business intelligence and market research (BI/MR) capability—information system. A BI/MR solution is required to facilitate planning and sourcing of OCS solutions in a timely manner to meet operational requirements and to drive force development where capabilities are insufficient.
- f. Economic analysis (EA) capability—information system. An EA solution is required to aid in the development of a theater acquisition strategy/plan and to determine the viability and benefit of using OCS to meet operational requirements.
- g. Requirements definition generation capability—information system. An RD-generation solution is required to plan and create standard requirements packages, accelerate staffing and approval, improve integration, reduce the cost of contracted support, and improve accountability and ownership of requirements by requiring activities.
- h. Standard biometric access (BA) capability—evolutionary development of existing capability. A standard BA solution is required to facilitate timely delivery of support to dispersed locations across the battlefield, improve accountability and visibility of contractors, and enhance force protection in accordance with law and DoD policy.

²⁵ CJCSI 6212.01E

²⁶ DoD 8500.2, DoD 8510.01

Appendices

Appendix A. OCS Operational View (OV-1)

Appendix B. References

Appendix C. Acronym List

Appendix D. OCS Functional Task Decomposition

Appendix E. Attributes

Appendix F. Policy and Doctrine

Appendix G. Organization and Personnel

Appendix H. Training, Leadership and Education

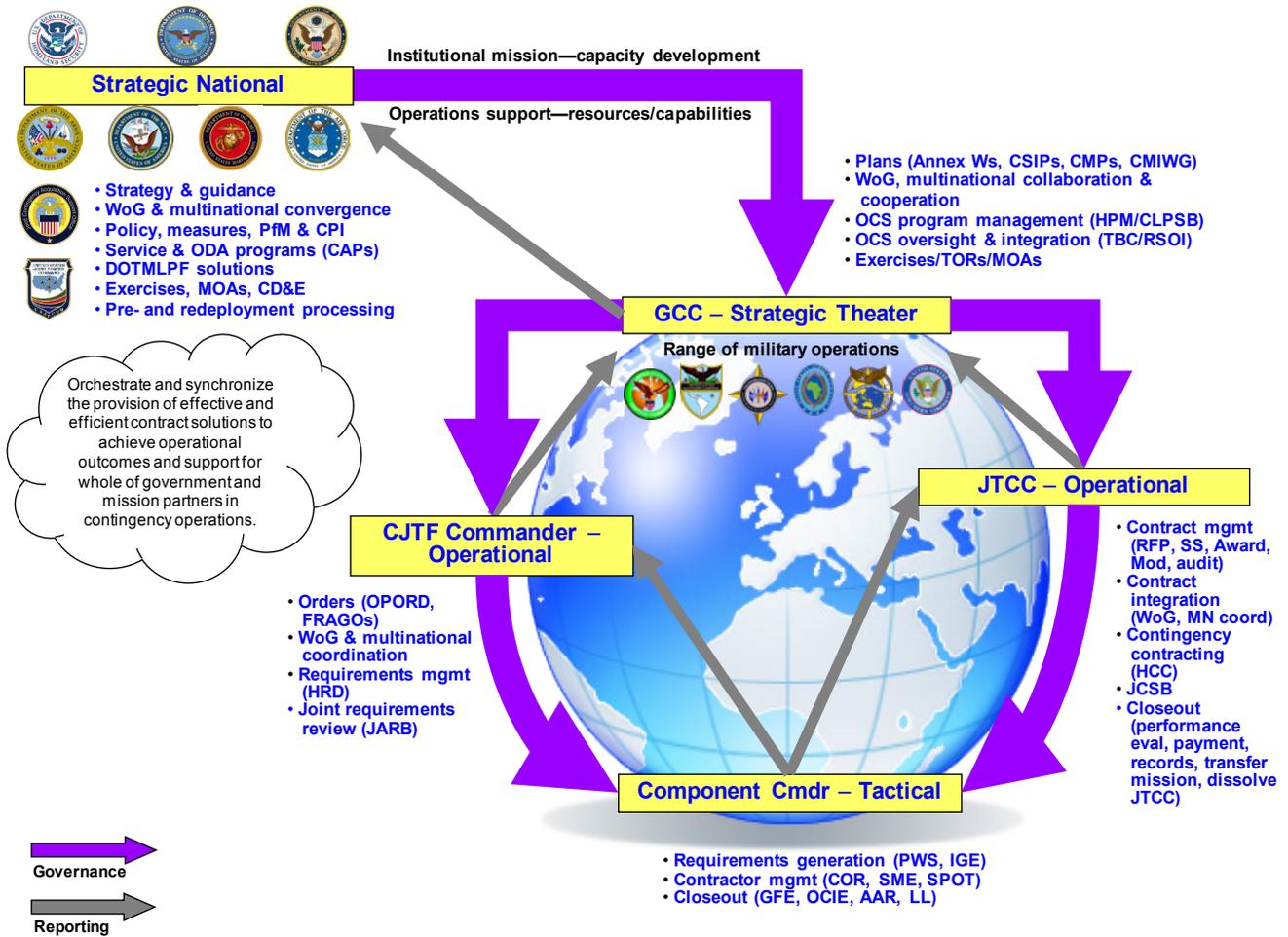
Appendix I. Materiel

Appendix A

OCS Operational View (OV-1)

Below is the OCS operational view (OV-1) as defined in the OCS CONOPS (http://www.acq.osd.mil/log/PS/cio/OCS_CONOPS_v8Jun2010.pdf).

Figure A-1: OCS OV-1.



Operational Contract Support (OCS) provides the Joint Force commander (JFC) options to achieve operational outcomes and support to forces. It operates at varying degrees across all echelons of DoD—from strategic to tactical—and across the range of military operations in the six planning phases (0–V). The impact of OCS by echelon and phase is directly dependent

on the U.S. government's strategic, operational, and tactical engagement objectives. The obvious dynamics require that DoD's OCS concept fully embrace a whole-of-government (WoG), responsive, and flexible approach to its role in the national and military strategy.

OCS involves the participation of many players—other government agencies (OGAs), Office of the Secretary of Defense (OSD), military departments (MilDeps), functional combatant commands (FCCs), the Joint Contingency Acquisition Support Office (JCASO), GCCs, coalition/combined joint task forces (CJTFs), Service components, combat support agencies (CSAs), joint theater contracting commands/centers (JTCC), the Joint Staff, and non-DoD partners. Each actor (identified in the figure above) has provider and customer roles at four echelons—strategic national, strategic theater, operational, and tactical. Governance (e.g., guidance, policy, process, measures) begins with building OCS capacity as an institutional mission at the highest level and ends at the tactical level with government personnel overseeing contractors during an operation, with benefits being realized across all echelons. At each echelon below national, commanders provide reporting (e.g., issues, requirements, lessons learned, metrics) to improve visibility and awareness to upper echelons, thus enabling continual process improvement.

At the *strategic national* level, the participants are OSD, its counterparts at the Departments of Homeland Security (DHS) and State (DoS), the Joint Staff, MilDeps, and CSAs. Senior policymakers in DHS, DoD, and DoS determine how the national security sector will use OCS, and they define the interagency and interdepartmental processes to ensure a WOG approach. OSD aligns strategy, policy, and investment for OCS within DoD and with mission partners via the OCS community of interest (COI) and its governing body, the OCS Functional Capabilities Integration Board (FCIB). The principal for OCS portfolio investment and policy is the Deputy Assistant Secretary of Defense for Program Support (DASD[PS]), advised and assisted by the Chairman of the Joint Chiefs of Staff; however, many other OSD offices also participate, including the Defense Acquisition University, which provides formal training and certification on contingency contracting and contingency program management. Each MilDep (Air Force, Army, and Navy) participates in this process by giving a senior commissioned officer or civilian member of the senior executive service the responsibility for administering OCS policy.

MilDeps and ODAs ensure sufficient capabilities to enable OCS in support of contingency operations through DOTMLPF programs and by maintaining contracts, such as logistics civil augmentation program (LOGCAP), Navy husbanding contracts, Defense Logistics Agency (DLA) Prime Vendor, etc, to support current and future requirements. The MilDeps and ODAs ensure uniformed and civil service personnel are collectively and individually trained and equipped to use contracted support in contingencies.

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The JCASO applies program management principles to OCS to ensure it is institutionalized and operationalized within DoD, and synchronized and coordinated with mission partners. If JCASO is required to support a CCDR, JCASO will be under the operational control of the CCDR.

CCDRs at the *strategic theater* level orchestrate, integrate, and synchronize the preparation and execution of acquisitions during contingency operations within their AOR. Their staffs (including the embedded JOCSPs from JCASO) are key to integrating and synchronizing OCS in formal plans (e.g., OPLANS, CONPLANS), addressing interagency and multinational OCS considerations, and arranging for exercise participation.

The head of program management (HPM), in coordination with the head of contingency contracting (HCC),¹ establishes policy (e.g., theater business clearance) to integrate systems and external support contracts into JOAs. External and systems support contracts may involve U.S. or third-country businesses and vendors. These contracts are usually prearranged, but they may be awarded or modified during the mission based on the commanders' needs. Examples include the Army LOGCAP, the Air Force civil augmentation program (AFCAP), the Navy global contingency construction contract (GCCC) and global contingency services contract (GCSC), the U.S. Army Corps of Engineers (USACE), the Naval Facilities Engineering Command (NAVFAC), the Air Force Center for Engineering and the Environment, and CSA contracts, as well as partner contracts from other nations or the North Atlantic Treaty Organization (NATO) Maintenance and Supply Agency (NAMSA). The CCDR may request a JCASO forward team deploy to lead PgM to enable and enhance CSI and CM. Generally, this option would be used in conjunction with a lead service, or it would facilitate the establishment of a JTCC as the HCC.

At the *operational* level, a CJTF commander must establish a RD and coordination process during combat operations, post-conflict operations, and contingency operations to ensure requirements are defined in a way that effectively implements WoG and DoD objectives, policies, and decisions regarding the allocation of resources, coordination of inter-agency efforts in the theater of operations, and alignment of requirements with the proper use of funds. The CJTF commander serves as head of requirements definition (HRD) and coordination during combat operations, post-conflict operations, and contingency operations. As the HRD, the CJTF commander oversees the requirements management functions across staff functions and down through the tactical level. The HRD establishes and leads a

¹ HCC = the senior commissioned officer, with appropriate acquisition experience and qualifications, designated by the GCC to perform contingency contracting by delivering contract solutions responsive to subordinate unified JTF commanders' requirements in an efficient manner by synchronizing and integrating contract methods within and external to the theater and in conjunction with WoG and coalition capabilities.

requirements review board (e.g., JARB) that involves all organizations concerned to assist in this responsibility.

In support of operational requirements, the HCC generates and executes contract solutions. The HCC (who is designated by the GCC, as defined above) may manifest in different forms. If the HCC is a JTCC that supports multiple CJTFs, it may oversee multiple SCOs (with augmentation) to support each CJTF. In the absence of a JTCC, a military service component, such as the Army's CSB (reinforced), may serve in this role. To facilitate coordination with joint, interagency, and partner contracting organizations, the HCC may establish a Joint Contracting Support Board (JCSB).

OCS at the *tactical* level requires accountability from initiation through close out of contracts. To achieve this, requiring activities must identify qualified, trained contracting officer's representatives (CORs) to act as the "eyes and ears" of the contracting officer in monitoring and reporting on the execution of the contract. Commanders perform requirements management to determine whether contract solutions deliver operational outcomes. They generate requirements, support (in coordination with contracting officers) performance of contingency contract administration services (e.g., CCAS), and oversee deployed operational forces (e.g., CORs). CORs perform contractor oversight in accordance with duties assigned by the contracting officer to ensure contractor services comply with the contract. CORs monitor contractor performance and ensure reporting to provide awareness and visibility to higher echelon staff and contracting officers.

The contracting officer performs contract management in support of the HCC (not the HRD) and retains authority to direct or approve changes to the contract deliverable terms, terminate the contract, or impose administrative actions against the contractor. The HCC may establish regional contracting centers (RCCs) to provide contract management for designated portions of a combined or joint operations area (CJOA) or CCDR theater.

Within the DoD, CCAS is the responsibility of the military services in accordance with their "train, organize, and equip" mission; however, if requested by the CCDR, the Defense Contract Management Agency (DCMA) may support CCAS requirements. If the requiring activity is external to the DoD, that organization provides the COR in conjunction with established terms of reference (TORs) and MOUs between the partners. In some cases, subject matter experts, such as certified electricians, and others with unique skills, qualifications, or certifications, may not be available within the requiring activity. The HCC should not award contracts without these technically qualified individuals in place.

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In summary, OCS provides operational outcomes and forces support. It can impact freedom of action and battlespace awareness for friendly and opposing forces; expand force size, structure, and skills; reduce military operations tempo and supply chain cycle time; increase readiness; deter insurgency; stimulate economic stability; build partner capacity; improve civil-military relations; and enhance unity of effort among WoG, host nation, and coalition partners.

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Development of the OCS initial capabilities document (ICD) is based upon the following primary references as well as expertise from the OCS community of interest and staffing of the OCS CONOPS (available at http://www.acq.osd.mil/log/PS/cio/OCS_CONOPS_v8Jun2010.pdf):

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Appendix C Acronym List

AAR	after action report
ABCA	American, British, Canadian, and Australian Armies' Program
AC	active component
ACO	administrative contracting officer
ACSA	acquisition cross-servicing agreement
ACT	advance civilian team
DASD(PS)	Deputy Assistant Secretary of Defense, Program Support
AFCAP	Air Force Contract Augmentation Program
AOR	area of responsibility
AT	antiterrorism
AV-1	all view-1
BA	battlespace awareness
BI	business intelligence
BOS	base operating support
C2	command and control
C4	command, control, communications, and computers
CAAF	contractors authorized to accompany the force
CAC	common access card
CALL	Center for Army Lessons Learned
CAGO	contractor-acquired, government-owned
CAM	capability area manager
CAP	civil augmentation program
cASM	Contingency Acquisition Support Module
CC	contingency contracting
CBA	capabilities-based assessment
CBRNE	chemical, biological, radiological, nuclear, and high yield explosives
CCAS	contingency contract administration services

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CCC	Contingency Contracting Corps
CCDR	combatant commander
CCJO	<i>Capstone Concept for Joint Operations</i>
CCO	contingency contracting officer
CD&E	concept development and experimentation
CfCO	Center for Complex Operations
CJCS	Chairman of the Joint Chiefs of Staff
CJCSI	CJCS instruction
CJCSM	CJCS manual
CJOA	combined/joint operations area
CJTF	combined/coalition joint task force
CLPSB	Combatant Commander Logistics Procurement Support Board
CM	contractor management
CMP	contractor management plan
CNA	computer network attack
CNE	computer network exploitation
COCOM	combatant command
COE	center of excellence
COI	community of interest
COM	chief of mission
CONOPS	concept of operations
CONPLAN	contingency plan; concept plan
COP	common operational picture
COR	contracting officer representative
CPI	continuous process improvement
CRC	Civilian Reserve Corps (DoS)
CS	civil support
CSA	combat support agency
CSART	combat support agency review team
CSB	contracting support brigade
CSI	contract support integration
CSIP	contract support integration plan

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DARS	DoD architecture repository system
DAU	Defense Acquisition University
DAWG	Deputy's Advisory Working Group
DCAA	Defense Contract Audit Agency
DCMA	Defense Contract Management Agency
DCR	DOTMLPF change recommendation
DFARS	<i>Defense Federal Acquisition Regulation Supplement</i>
DHS	Department of Homeland Security
DIACAP	DoD Information Assurance Certification & Accreditation Process
DIMEFIL	diplomatic, information, military, economic, financial, intelligence, and law enforcement
DLA	Defense Logistics Agency
DoD	Department of Defense
DoDD	Department of Defense Directive
DoDI	Department of Defense Instruction
DoS	Department of State
DOTMLPF	doctrine, organization, training, materiel, leadership and education, personnel, and facilities
DPAP	Defense Procurement and Acquisition Policy
DRS	designated reception sites
DSCA	Defense Security Cooperation Agency
DSCA	defense support of civil authorities
DUSD/DCMO	Deputy Under Secretary of Defense, Deputy Chief Management Officer
DUSD(A&T)	Deputy Under Secretary of Defense for Acquisition and Technology
EA	economic analysis
ECC	expeditionary contracting command
EMC	electromagnetic compatibility
ESF	emergency support function
FACT	field advance civilian team
FAR	Federal Acquisition Regulation

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FCC	functional combatant commander
FCIB	Functional Capabilities Integration Board
FEMA	Federal Emergency Management Agency
FMS	foreign military sales
FOO	field ordering officer
FRAGO	fragmentary order
GAO	Government Accountability Office
GCC	geographic combatant command
GCCC	Global Contingency Construction Contract
GCSC	Global Contingency Service Contract
GDF	<i>Guidance for Development of the Force</i>
GEF	<i>Guidance for Employment of the Force</i>
GFE	government-furnished equipment
GFS	government-furnished support
GIG	Global Information Grid
GSA	General Services Administration
HCA	head of contracting activity
HCC	head of contingency contracting
HD	homeland defense
HN	host nation
HPM	head of program management (for OCS)
HQ	Headquarters
HRD	head of requirements definition
IA	information assurance
IA	interagency
IAW	in accordance with
ICD	initial capabilities document
ICW	in coordination with
ID	Identification
IGE	independent government estimate
IM	information management
IMS	Interagency Management System

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IO	information operations
IPC	integration planning cell
IPT	integrated product team
ISO	in support of
IW	irregular warfare
I&W	indications and warnings
J-1	Manpower and Personnel
J-2	Joint Staff Intelligence
J-3	Operations
J-4	Logistics
J-5	Strategic Plans and Policy
J-6	Command, Control, Communications, and Computer Systems
J-7	Operational Plans and Joint Force Development
J-8	Force Structure, Resources, and Assessment
JALLC	Joint Analysis and Lessons Learned Centre
JARB	Joint Acquisition Review Board
JCA	joint capability area
JCASO	Joint Contingency Acquisition Support Office
JCIDS	Joint Capabilities Integration And Development System
JCS	Joint Chiefs of Staff
JCSB	Joint Contracting Support Board
JDG	Joint Doctrine Group
JF	Joint Force
JFC	Joint Force commander
JIC	joint integrating concept
JIIM	joint, interagency, intergovernmental, and multinational
JLLIS	Joint Lessons Learned Information System
JMD	joint manning document
JOA	joint operations area
JOC	joint operating concept
JOCSP	joint operational contract support planner

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JOPES	Joint Operation Planning and Execution System
JOpsC	joint operations concepts
JP	joint publication
JROC	Joint Requirements Oversight Council
JTCC	joint theater contracting command/center
JTF	joint task force
KO	contracting officer
LL	lessons learned
LN	local national
LOA	letter of authorization
LOC	lines of communication
LOGCAP	Logistics Civil Augmentation Program
LOW	levels of war
MCO	major combat operations
MILDEP	military department
MLSA	mutual logistics support agreement
MN	multinational
MOA	memorandum of agreement
MOU	memorandum of understanding
MR	market research
NAMSA	NATO Maintenance and Supply Agency
NATO	North Atlantic Treaty Organization
NAVFAC	Navy Facilities Engineering Command
NDAA	<i>National Defense Authorization Act</i>
NDS	<i>National Defense Strategy</i>
NGO	non-governmental organization
NIMS	National Incident Management System
NMS	<i>National Military Strategy</i>
NRF	National Response Framework
NSC	National Security Council
NSS	<i>National Security Strategy</i>
OCIE	organizational clothing and individual equipment

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OCOP	OCS common operational picture
OCS	operational contract support
ODA	other defense agency
OEF	OPERATION ENDURING FREEDOM
OGA	other government agency
OIF	OPERATION IRAQI FREEDOM
OMB	Office of Management & Budget
OND	OPERATION NEW DAWN
OP	operational
OPLAN	operation plan
OPORD	operations order
OSD	Office of the Secretary of Defense
OV	operational view
PA	property administrator
PfM	portfolio management
PGI	procedures, guidance, and information
PgM	program management
PME	professional military education
POM	program objective memorandum
PPBE	planning, programming, budgeting, and execution
PSA	principal staff assistant
PWS	performance work statement
QAR	quality assurance representative
QDR	<i>Quadrennial Defense Review</i>
R&S	reconstruct and stabilize
RC	reserve component
RCC	regional contracting center
RD	requirements definition
ROMO	range of military operations
RRC	Response Readiness Corps (DoS)
RSOI	reception, staging, onward movement, and integration
RUF	rules for the use of force

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S/CRS	Office of the Secretary of State, Office of the Coordinator for Reconstruction and Stabilization
SCO	senior contracting official
SecDef	Secretary of Defense
SIGIR	Special Inspector General for Iraq Reconstruction
SITREP	situation report
SME	subject matter expert
SN	strategic national
SOFA	status-of-forces agreement
SPOT	Synchronized Predeployment and Operational Tracker
SSTR	stabilization, security, transition, and reconstruction
ST	strategic theater
SWarF	Senior Warfighter Forum
TA	tactical
TBC	theater business clearance
TCN	third country national
TOR	terms of reference
TPFDD	time-phased force deployment data
TRADOC	Training and Doctrine Command
TTP	tactics, techniques, and procedure
TWCA	theater-wide contract administration
UCP	Unified Command Plan
UID	unique identification
UJTL	Universal Joint Task List
UN	United Nations
USACE	U.S. Army Corps of Engineers
USAID	U.S. Agency for International Development
USC	U.S. Code
USD(AT&L)	Under Secretary of Defense Acquisition, Technology, and Logistics

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USD(C)/CFO	Under Secretary of Defense Comptroller/Chief Financial Officer
USD(P)	Under Secretary of Defense for Policy
USD(P&R)	Under Secretary of Defense for Personnel and Readiness
USAFRICOM	United States Africa Command
USCENTCOM	United States Central Command
USEUCOM	United States European Command
USJFCOM	United States Joint Forces Command
USNORTHCOM	United States Northern Command
USPACOM	United States Pacific Command
USSOCOM	United States Special Operations Command
USSOUTHCOM	United States Southern Command
USSTRATCOM	United States Strategic Command
USTRANSCOM	United States Transportation Command
UTC	unit type code
WMD	weapon of mass destruction
WoG	whole of government

Appendix D

OCS Functional Task Decomposition

The chart below identifies the OCS tasks to be performed by function (columns) and echelon (rows).

Echelon	OCS Tasks					
	Institutional/Capacity development	Program Management	Contingency Contracting	Requirements Definition	Governance	Reporting
SN	Perform portfolio management	Integrate lessons learned			Guidance/direction, policy, TTP, measures, audits, resources, training, CPI	Metrics/statistics, LL, AARs, SITREPS, reports, issues, requirements
	Develop/revise strategy/policy	Integrate OCS into exercises				
	Develop/revise doctrine	Integrate OCS into training				
	Develop/maintain capabilities	Integrate OCS across J-Dirs				
	Institutionalize OCS	Establish WoG/partner relationships				
	Conduct strategic communications	Establish Joint relationships				
		Provide resources/support to operations				
ST		Plan for OCS				
		Organize OCS activities				
		Staff for OCS				
		Monitor OCS				
		Control OCS				
		Lead OCS				
		Conduct stakeholder mgmt				
		Perform benefits mgmt				
		Establish governance/reporting				
		Promote OCS collaboration w/ partners				
		Close program				
OP			Establish theater contracting org	Manage requirements		
			Coordinate w/ partners	Integrate Joint/WoG/partner requirements		
			Manage and administer theater contracting organization	Review requirements		
			Support and deconflict CERP	Coordinate CERP		
			Integrate common contract support	Integrate OCS into ops		
			Manage contracts	Ensure CORs/SMEs are available, assigned, trained, and performing to standard		
			Conduct CCAS			
			Enforce contractor compliance	Manage contractors		
			Manage contractors			
			Close out contracts			
			Transition contract support			
TA			Plan, develop and execute contracts	Develop "acq ready" reqmt pkgs		
			Assist in contract surveillance	Assist in contract surveillance		
			Close out contracts	Perform requirements management		
			Return GFE/CAGO	Disposition GFE/CAGO		

Appendix E

Attributes

The following are capability attributes for OCS:

- 1) *Responsiveness*—providing the right support when it's needed and where it's needed. Responsiveness is characterized by the reliability of support and the speed of response to the CCDR needs.
- 2) *Attainability*—the assurance that the minimum essential supplies and services required to execute operations will be available. Attainability is the point at which the CCDR judges that sufficient supplies, support, distribution capabilities, and lines of communication (LOC) capacity exist to initiate major combat operations at an acceptable level of risk. It is also that point at which logistic capabilities exist at a level that will allow the transition of operations between phases. Examples of minimal requirements are inventory on hand (days of operations) and critical support and service.
- 3) *Flexibility*—the ability to improvise and adapt logistic structures and procedures to changing situations, missions, and operational requirements. Flexibility is reflected in how well logistics responds in an environment of unpredictability.
- 4) *Survivability*—the capacity of an organization to prevail in the face of potential threats. Survivability is directly affected by dispersion, design of operational logistic processes, and the allocation of forces to protect critical logistic infrastructure.
- 5) *Sustainability*—the ability to maintain the necessary level and duration of operational activity to achieve military objectives. Sustainability is a function of providing for and maintaining those levels of ready forces, materiel, and consumables necessary to support military effort.
- 6) *Simplicity*—a minimum of complexity in logistics operations. Simplicity fosters efficiency in planning and execution and allows for more effective control over logistic operations.
- 7) *Economy*—the amount of resources required to deliver a specific outcome. Economy is achieved when support is provided using the fewest resources within acceptable levels of risk.

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- 8) *Accountability*—the ability to identify and manage various levels of support to achieve operational requirements. Accountability provides the JFC total asset visibility across his or her areas of responsibility. It is the most effective means to recognize, track, and report on all material and human assets supporting the mission within a joint operations area (JOA) from point of embarkation to redeployment.

Appendix F

Policy and Doctrine

The following issues and topics identified during the CBA must be addressed, clarified, or expanded in policy and doctrine:

- a. Measurable tasks for all OCS functions across all echelons must be identified, and then tasks must be added, modified, or deleted to the UJTLs IAW CJCSI 3500.02 to match the OCS identified tasks
- b. PgM and RD
- c. Requiring activity planning and requirements management
- d. Theater-strategic and operational level planning
- e. Theater acquisition strategy
- f. Theater business clearance (TBC)
- g. Designated reception sites (DRSs)
- h. Contingency Contract Administration Services (CCAS)
- i. Foreign military sales (FMS)-like use of OCS for capacity building
- j. Base operating support (BOS) for base, camp, post, and station
- k. Maturity: portfolio management (PfM), continuous process improvement (CPI), lessons learned (LL)
- l. JCA-coded contracts
- m. Integration with joint, IA, and MN partners (which will likely include agreements at least with organizations external to DoD)
- n. Use of acquisition cross-servicing agreements (ACSAs) and mutual logistics support agreements (MLSAs)
- o. Integration with all J directorates
- p. Integration into operations: common operational picture (COP); Time-Phased Force & Deployment Data (TPFDD); command, control, communications, and computers (C4); anti-terrorism (AT); etc.

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- q. Governance and relations, including triggers (e.g., availability and responsiveness reporting), indications and warnings (I&W), processes, transitions (e.g., between organizations and operational phases), continuity, and information management (IM).

Appendix G

Organization and Personnel

The following organizational and personnel solutions identified during the CBA require resourcing, manning, or policy decisions:

- a. Force mix of active component (AC), Reserve component (RC), civilians, and contractors
- b. OCS human capital strategy that includes all OCS functions
- c. OCS lead for policy
- d. OCS centers of excellence (CoEs)
- e. Special experience identifiers for tracking personnel
- f. Joint Contingency Acquisition Support Office (JCASO)
- g. OCS functions in Office of the Secretary of Defense (OSD), other defense agencies (ODAs), combat support agencies (CSAs), and the Services
- h. OCS organizations (including prepackaged contract capabilities²⁸) and Staff personnel (including manning for JS, CCDRs, Services, etc)
- i. Joint Operational Contract Support Planners (JOCSPs)
- j. PgM, RD, CSI, and CM
- k. Joint Theater Contracting Command/Center (JTCC)
- l. Boards (e.g., CLPSB, JARB, JCSB), cells, and regional contracting offices (RCOs)
- m. Contingency contracting officers (CCOs), senior contracting officials (SCOs), and administrative contracting officers (ACOs)
- n. Contracting officer's representatives (CORs), quality assurance representatives (QARs), property administrators (PAs), and subject matter experts (SMEs)
- o. Base operating support (BOS) organizations and staff (e.g., mayors, FOOs)

²⁸ Akin to unit type codes (UTCs) for military forces.

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- p. Instructors (e.g., schools, centers, PME)
- q. Training activities staff (e.g., DAU, LL centers, observers, advisors)
- r. DCMA (CSART/CCAS)
- s. Recruiting and retention
- t. Integration with NATO/NAMSA
- u. Integration with Chief of Mission (COM) and the Interagency Management System (IMS)
- v. Integration with the Department of Homeland Security (DHS) and the National Response Framework (NRF)
- w. Integration with the Office of Federal Procurement Policy and the Acquisition Workforce Development Strategic Plan
- x. Integration with GSA, OMB, and the government-wide Contingency Contracting Corps (CCC)
- y. Integration with the DoS/CRS, the Civilian Reserve Corps, and the Response Readiness Corps

Appendix H

Training, Leadership and Education

The following training and education audiences and issues, which were identified during the CBA, must be addressed:

- a. Program management personnel
- b. Systems, external, and theater support contract personnel
- c. Centers of excellence, LL activities (e.g., JCASO, TRADOC, DAU)
- d. Theater strategic/operational level planners (e.g., JOCSPs, service component planners)
- e. OCS functional personnel
- f. Contracting personnel (e.g., CCOs, SCOs, ACOs)
- g. Non-acquisition personnel (e.g., commanders, requiring activities, staffs, and functional directorates)
- h. CORs, QARs, PAs, and SMEs
- i. Reserve and Guard personnel
- j. WoG and MN partners
- k. Companies and contract personnel
- l. Experience and qualifications levels
- m. Maintaining contingency expertise
- n. Implementation of OCS policy and doctrine
- o. Use of OCS systems
- p. Integration of OCS in individual and collective training and exercises

Appendix I

Materiel

Synchronization among requiring activities, contracting offices, theater personnel, and contractors requires significant coordination and information sharing. The following recommended materiel solutions will overcome the OCS gaps identified during the CBA:

- a. OCS common operational picture (OCOP) capability. An OCOP is essential to *integrating OCS into operations* and *monitoring OCS* by ensuring the JFC has greater visibility of the availability and responsiveness of contract solutions (contracts and contractors) in the area of responsibility (AOR). Visibility and accountability of contractor organizations, what materiel assets they have in their custody, who their people are, and where they are located are essential elements of information that must be shared in a net-centric environment. An OCOP will provide the JFC with options (e.g., Can a contract solution more effectively or efficiently achieve a course of action?) to achieve military objectives. It will also facilitate the consideration of contractors as a component of the Total Force in decisions that impact them (e.g., force maneuver and protection issues) as the operation evolves. Development of an OCOP will improve OCS monitoring at the combatant commander (CCDR) level to ensure adequate reporting of OCS-related statistics and metrics, to maintain an understanding of the impact of OCS on deployed military operations, to ensure sufficient and ready contract solutions, and to influence or improve outcomes for the commander.
- b. Business intelligence and market research (BI/MR) capability. BI and MR promote sufficient, timely, and non-redundant contract solutions (both in theater and deployable to theater) so they are available and accessible to the JFC. This capability will enable *leadership of OCS* among diverse participants (e.g., joint, WoG, and coalition) and *integration of common solutions* (e.g., systems, external, and theater support contract vehicles, ACSAs, MLSAs). BI and MR information must be shared in a net-centric environment to enable sharing of information across myriad of contracting, finance, planning and other functions. A business intelligence capability will help identify capable sources when and where outcomes are required. Market research will allow the commander to leverage existing capabilities, minimizing the time and cost associated with generating new contract solutions. Together these capabilities facilitate rapid quality contract solutions in an efficient manner that enhances unity of effort.

- c. Economic analysis capability (EA). An EA capability will facilitate *planning for OCS* in coordination with deliberate theater planning and in response to dynamic operations in support of operations. This capability provides a cost estimate and economic analysis for commercial contracting. It includes buy vs. lease models, foreign exchange currency analysis, labor analysis, and cost and price analysis tools. A knowledgeable analysis team conducting strategic OCS planning is invaluable to overall mission planning. It evaluates the viability of using contract support to support contingency operations to include assessing the risk of adversary influence on procurement of supplies and services. This capability enables the review of operational plans, orders, and policies to ensure the appropriate integration and *leadership of OCS*. It also supports both deliberate planning for OCS and ad hoc requirements that may require contracted support.
- d. Requirements definition (RD) capability. A standardized RD capability will enable the *development* of acquisition-ready *requirements packages*. Standardizing RD within DoD, across WoG, and with partners will facilitate synchronization and integration of requirements to meet coalition requirements in the most effective and efficient manner. This capability must facilitate documentation and coordination of ad hoc requirements among requiring activities, contracting offices, and commanders. It must aid in development of performance work statements (PWSs), independent government estimates (IGE), letters of justification and approval, sources and funding, and other supporting documents as needed. Proper development of an RD capability will facilitate rapid coordination, review, and approval of requirements; delivery of optimized contracted solutions to meet requirements; and management and support of contracted support to ensure it satisfies the operational needs.
- e. Standard biometric access (BA) capability. A standardized BA solution facilitates the *management* and support of *contractors* within and between operations. Some contracted support requires contractors to have access to military bases and posts. As a force protection issue, access to military facilities and personnel requires control measures. Biometric access controls are used to authenticate contractors; however, access cards are not standardized across all locations. This lack of standardization causes delays and increases costs for contractors who must travel between locations and obtain multiple cards to complete their assigned tasks. Net-centric accountability is enabled by compliance with DoD unique identification (UID) standards to achieve an integrated capability for identification, tracking, and reporting of organizations, material assets, people, and places. This also restricts the JFC's flexibility in using contractor support without specifying in advance the locations to which contractors are permitted access, and it may require contract modifications when new requirements arise.