



CHAIRMAN OF THE JOINT CHIEFS OF STAFF INSTRUCTION

JHO
DISTRIBUTION: A, C, JS-LAN

CJCSI 5320.01B
13 January 2009

GUIDANCE FOR THE JOINT HISTORY PROGRAM

References:

- a. CJCS Manual 3122.01A, "Joint Operation Planning and Execution System (JOPES) Volume I, Planning Policies and Procedures"
- b. CJCSM 3500.04 series, "Universal Joint Task List"
- c. CJCSM 5760.01 series, Volumes I, "Records Management Policy for the Joint Staff and Combatant Commands" and Volume II, "Joint Staff and Combatant Command Records Management Manual"
- d. CJCSM 3213.02B series (Limited Distribution), "Joint Staff Focal Point Communications and System Procedures Manual"

1. Purpose. The Joint History Program provides the official record of the roles of the Chairman, Joint Chiefs of Staff, and the combatant commands in the development and implementation of national security policy. It is an especially valuable source of historical, doctrinal, and legal information. This instruction provides guidance for the Joint History Program.

2. Cancellation. CJCSI 5320.01A, 28 August 2003, is canceled.

3. Applicability. The Joint History Program includes the Director for Joint History, the Joint History Office, the history programs of the commanders of the combatant commands, and Active Duty/Reserve Component historians assigned to the historical programs of the combatant commands. This instruction applies to the Joint Staff and the commanders of the combatant commands. It does not affect the responsibilities of the Services for preparing their histories and for conducting their historical programs.

4. Policy. The objectives of the Joint History Program are:

- a. Document the role of the Chairman of the Joint Chiefs of Staff, Vice Chairman of the Joint Chiefs of Staff, the Joint Chiefs of Staff, the Joint Staff,

and combatant commands in the development and implementation of national security policy.

b. Produce written official histories that document, record, describe, and analyze the joint aspects of military planning and operations at the Joint Chiefs of Staff and combatant command level.

c. Provide historical support to the Chairman, Vice Chairman, the Joint Chiefs of Staff, the Joint Staff, and commanders of the combatant commands.

d. Promote knowledge of the history of joint activities and operations among the Joint Staff, the Services, the Joint and Service schools, public and private groups, and the general public.

e. Foster unity of effort on joint history matters through training and liaison with the Joint Staff, the Services, and the commanders of the combatant commands.

f. Assist the commanders of the combatant commands in maintaining strong historical programs that produce written annual or multi-year command histories, to include providing feedback on the quality of command histories that are submitted.

5. Definitions. None

6. Responsibilities. See Enclosure A.

7. Summary of Changes.

8. Releasability. This instruction is approved for public release; distribution is unlimited. DOD components (to include the combatant commands), other federal agencies, and the public may obtain copies of this instruction through the Internet from the CJCS Directives Home Page--http://www.dtic.mil/cjcs_directives.

9. Effective Date. This instruction is effective upon receipt.



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Enclosures:

- A - Responsibilities
- B - Periodic Historical Reports
- C - Requirements for Combatant Commander Interviews

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ENCLOSURE A

RESPONSIBILITIES

1. Director for Joint History. The Director for Joint History will plan, implement, and manage the Joint History Program to emphasize the joint dimension of military history. The Director will seek to ensure complete and accurate historical coverage of joint operations and activities. In the accomplishment of this mission, the Director for Joint History will:

a. Serve as the principal adviser to the Chairman of the Joint Chiefs of Staff on historical matters and act as the CJCS spokesperson on joint history matters.

b. Coordinate and integrate Joint History Program activities.

c. Formulate and coordinate policy on joint history with the Services and the commanders of the combatant commands. As appropriate, solicit the Service historical offices to prepare joint histories under arrangements mutually agreed upon by the Director for Joint History, the Service history offices, and the combatant command historians concerned.

d. Advise the Directorate for Operational Plans and Joint Force Development (J-7) of joint historical studies being coordinated with the National Defense University.

e. Supervise the work of the Joint History Office (JHO) and assign preparation of histories, studies, and projects to the office staff.

f. Advise the commanders of the combatant commands about the adequacy of their historical programs and assist them in obtaining resources for their programs.

g. Coordinate the historical programs of the commanders of the combatant commands with the Joint Staff and the Services in accordance with reference a to provide full and proper historical coverage of joint activities and operations.

h. Maintain liaison with the historical offices of the commanders of the combatant commands to facilitate coordination among them and the Service components as well as with subunified and combined commands.

i. In order to ensure the best qualified historians are selected for the joint historian positions, the Director for Joint History, in accordance with the applicable civilian personnel office (CPO) hiring procedures, will provide staff assistance in the selection and hiring of the combatant command senior historian and subunified command historian positions.

j. Coordinate Joint History deployments in accordance with reference a to ensure that deployed joint historical elements are properly staffed, trained, and equipped.

k. Facilitate access for Joint History Program personnel to all sources necessary for their research.

l. Coordinate with the J-7, Joint Education and Doctrine Division, to provide inclusion of appropriate historical experience in developed and emerging joint doctrine.

m. Encourage study and research on historical subjects relevant to joint operations and activities in Joint and Service schools, international military institutes, universities, and research centers. Prepare and deliver oral and written presentations on joint historical topics to public and private audiences. Encourage graduate student internships, faculty fellowships, and research in joint history. Encourage awareness of the joint dimension of military history through presentations to public and private organizations.

n. Maintain liaison with the history and museum programs of the Office of the Secretary of Defense, the Services, the Department of State, the Central Intelligence Agency, and other federal agencies concerned with joint military operations.

o. Maintain liaison with the National Archives and Records Administration on records matters and provide advice to combatant command historians on document retention and declassification.

p. Maintain liaison with international historical organizations and foreign government military history offices.

q. Prepare and deliver oral and written presentations on joint historical topics to public and private audiences.

2. Joint History Office. The JHO will produce accurate, thorough, and objective official histories of the activities of the Chairman and Vice Chairman of the Joint Chiefs of Staff, the Joint Chiefs of Staff, the Joint Staff, and of joint operations conducted by the U.S. Armed Forces. To accomplish this mission, the JHO will:

- a. Produce and publish *The Joint Chiefs of Staff and National Policy* series portraying the role of the Chairman of the Joint Chiefs of Staff, the Joint Chiefs of Staff, and the Joint Staff in the development of national security policy. Contractor support may be used to ensure timely completion.
- b. Produce historical volumes and studies as requested by the Chairman and the Vice Chairman of the Joint Chiefs of Staff, the Director of the Joint Staff, or the Director for Joint History.
- c. Produce official histories of the role of the Chairman and the Vice Chairman of the Joint Chiefs of Staff, the Joint Chiefs of Staff, and the Joint Staff in joint operations and actions and/or guides to the documentation generated by such operations and actions.
- d. Coordinate the preparation of joint histories and studies with the Services and the commanders of the combatant commands as appropriate.
- e. Coordinate Active Duty and/or Reserve Component historian deployments to document joint operations.
- f. Review the official command histories of the commanders of the combatant commands for quality, completeness, and conformance with guidance provided by the Director for Joint History.
- h. Make triennial staff assistance visits to review combatant command historical activities, products, and historical document management. Furnish staff assistance to the commanders of the combatant commands to facilitate proper coordination with the Services and the Service components as well as with subunified and combined commands on historical matters. Assist combatant command historians in obtaining Active Duty/Reserve Component historians in their offices and in deployed Joint Task Force (JTF) headquarters as field historians.
- i. Conduct periodic interviews with the Chairman of the Joint Chiefs of Staff and senior members of the Joint Staff. Special emphasis will be placed on policy matters as they relate to the Joint Staff, the President, Secretary of Defense, National Security Council, the combatant commands, and current plans and operations. Interviews will be treated as working papers until they have been coordinated with appropriate staff agencies and approved by the person interviewed.
- j. Review papers, actions, manuscripts, articles, and speeches for historical accuracy for the Chairman of the Joint Chiefs of Staff, the Vice Chairman of the Joint Chiefs of Staff, and the Joint Staff.

k. In coordination with the Joint Staff Information Management Division, collect important paper and electronic material related to the operations of the Joint Staff required to support the production of official historical studies. These records are not deemed as permanent records and will be destroyed or transferred to IMD following completion of the supported historical study.

1. Assist combatant command historians in creating Individual Mobilization Augmentee (IMA) billets in their offices. The IMAs may augment command history offices, or deploy as directed by the combatant command historian.

3. Historical Programs of the Commanders of the Combatant Commands. The commanders of the combatant commands maintain historical programs to ensure the production of accurate, thorough, and objective historical accounts of the significant activities of their commands, including all significant contingency and joint operations conducted by their commands. Combatant commanders are required under Title 44 U.S. Code Chapter 33 and 36 CFR 1228 to maintain records of the command, including those deemed historically significant. To accomplish this historical mission, the commander of the combatant command will:

a. Maintain a dedicated, full-time history office. Recommended staffing level is at least two professional historians, as well as an administrative assistant, and an archivist or information technology specialist. The history offices will report directly to the deputy combatant commander/chief of staff, and will be represented at meetings of staff principals. The history offices will conduct periodic interviews with members of the command group. To ensure access to meetings in secure facilities and to collect all relevant documentation, at least one person in each combatant command history office will have a clearance for TOP SECRET SENSITIVE COMPARTMENTED INFORMATION (TS-SCI) as well as access to all relevant documentation contained in FOCAL POINT (FP) materials.

b. Submit annual or multiple-year historical reports through the Director for Joint History to the Chairman of the Joint Chiefs of Staff. See Enclosure B.

c. The combatant command historian is not the command's records manager; the historical function is completely separate from records management and preservation. However, interviews of key personnel, key documents, and supporting records are essential material for the writing of command histories. Accordingly, as required to support the writing of command histories and to insure the preservation of historically important documents, combatant command historians will collect and preserve interviews and the electronic and paper records needed to document the activities of their combatant command in its command histories. The command historian will advise the command records manager upon reorganization, relocation, or

inactivation of command or subordinate elements to ensure key records are secured and preserved.

d. USSOCOM's historical office is the lead joint historical office for documenting joint special operations forces operations and for synchronizing historical coverage of theater special operations commands.

e. Coordinate all historical activities within their commands and with Service components to achieve unity of effort and complete coverage of joint operations while avoiding duplication. Responsibility for the command, control, and administration of Service historical activities rests with the Service component headquarters within the combatant command.

f. Provide for historical coverage of mobilization planning and crisis action procedures, to include access for command historians to command operations centers and all appropriate sources (see reference b).

g. Ensure that history annexes are included in appropriate operations plans, operations orders, and concept plans according to reference a. The annexes will specify how historical coverage will be accomplished and provide details on the deployment of joint historians and the type of material and information to be collected.

h. Maintain liaison with the Director for Joint History.

i. Ensure conformity of subunified and combined command official histories with stated requirements to include establishing periods covered, format, and due dates.

j. Meet with their command historians for periodic interviews, including exit interviews. Guidance for conduct of these interviews is in Enclosure C.

k. In accordance with reference c, facilitate liaison between the historian and the command records manager to ensure that key records, to include SCI and ACCM documents and all electronic records, are reviewed, organized, and secured for the historical record.

l. Acquire and align reservists to support field deployments and history office activities, to include the creation of the appropriate number of IMA billets within the combatant command history office. Reserve augmentees assigned to combatant command history offices work for the combatant command and not their parent Service. All documents and interviews collected by the reserve historian while assigned to the combatant command are the property of the supported combatant command (see reference c). In the case of reserve support to the combatant command Special Operations Commands, reserve

augmentation will be coordinated through the USSOCOM History Office, the combatant command History Office, and the JHO.

m. Convene a panel to advise on the professional qualifications of the candidates to replace combatant command or subunified command historians. This panel should include at least one government historian from outside that combatant command. JHO historians are available to serve on such panels. The selection process will be guided by the requirement to produce book-length official command histories.

n. The combatant command will issue a letter of instruction (LOI) to the historian of each subordinate JTF. The LOI will specify the JTF historian's mission, authorities, and collection requirements. The provisions of the LOI will be IAW this instruction and references c and d.

4. Reserve Component Historians. Reserve component historians aligned to joint missions will train periodically with the JHO and combatant command history offices and be available to assist them in times of emergency or crisis, deploying as needed. Service components will provide trained personnel to deploy to assist and supplement the combatant command historians either in a combatant command or a JTF Headquarters; it is essential that these personnel possess a Top Secret clearance. At least one IMA or Reserve billet should be designated for a TS-SCI clearance to enable a Reserve Component historian to attend staff meetings in secure facilities and collect the necessary documents. In the accomplishment of this mission, Reserve Component historians will:

a. Maintain proficiency by regular joint and Service training.

b. At the request of the Director for Joint History, and after coordination with the appropriate Services, participate in deployments to train with unified commands during joint exercises.

c. Upon mobilization and deployment, assist or supplement historical offices by collecting documents and other sources, preserving and organizing historical material, conducting interviews, and preparing chronologies of joint planning and operations.

d. Joint Task Force historian billets should be coded for assignment by any Service and with a clearance requirement of Top Secret.

ENCLOSURE B

PERIODIC COMMAND HISTORIES

1. Submissions and Disposition

a. The unified command history will either cover the calendar year or the tour of duty of the commander of the combatant command.

b. Command histories that are prepared on an annual basis should be submitted to the Director for Joint History by 31 December of the following year. Those that cover the tenure of the commander of the combatant command will be submitted by 31 December of no more than 2 years following the commander's departure. Any extension requires the approval of the Director, JHO. Two copies will be submitted to each of the Service historical offices.

c. Combatant commands intending to produce their command histories on a basis other than the calendar year or the tenure of the commander or wishing to substitute monographs or short studies focusing on particular topics will coordinate their plans with the JHO. In no case will a command history cover more than a 4-year period.

d. Failure to submit command histories will be reported by a letter from the Director for Joint History to the Chief of Staff of the combatant command.

2. Form. The command history will be a fully documented narrative history containing a subject index. Detailed accounts of special operations and exercises or descriptions of special problems not appropriate for the narrative may be included as appendices. Charts may be added wherever appropriate, but supporting documents (e.g., copies of directives and regulations) should not be included. Copies may be submitted either in hard copy or in an electronic format coordinated between the JHO and the respective combatant command.

3. Content

a. The narrative portion of each command history should emphasize the operational, planning, logistical, and administrative activities of the headquarters. It should pay particular attention to the degree of success in

these areas and to problems and difficulties encountered. Significant activities of all major staff divisions should be covered. Routine or trivial matters should be left out. Data listing the command's total personnel strength and major forces assigned at the end of each year covered in the history should be included. Lists and locations of interviews and oral histories conducted during the reporting period will be included.

b. Operations undertaken in connection with international crises should receive special attention.

c. The mobilization planning and crisis action procedures of the headquarters should be covered. Full and detailed reporting should be included in the event of an actual mobilization.

d. With the exception of USSOCOM, details of the operations of component commands should not be included, except for accounts of their participation in international operations or important joint exercises. Interaction between unified command headquarters and component command headquarters, however, should be covered in detail when appropriate.

e. Commanders of unified commands, who are also commanders or senior U.S. representatives of combined commands, should include in their reports accounts of U.S. participation in combined commands. These accounts will be confined to matters relating to the United States.

4. Classification

a. Reports should be classified according to content, up to and including TOP SECRET/Code Word.

b. Reports including intelligence material requiring special classifications will be submitted as separately bound annexes.

5. Technical Guidance. The Director for Joint History will provide guidance on professional standards. Direct communication between the combatant command historians and the Director for Joint History on professional matters is authorized and encouraged. In cases where historians elect to prepare combatant command tour histories, biennial staff visits from the JHO will be used to certify to the combatant command historian's supervisor — normally the chief of staff — that progress is being made and that documents are being properly collected and stored.

ENCLOSURE C

COMMANDER, COMBATANT COMMAND, INTERVIEWS

1. Conduct and Submission

a. Command historians will interview their departing commanders. These interviews may be conducted more frequently, as arranged between the commander and the command historian.

b. Command historians may also interview key staff when appropriate. In developing questions for such interviews, command historians should coordinate their effort with the historians of other unified commands who might have shared operational interests and with the Joint History Office.

(1) Interviews will be treated as working papers until such time as they have been reviewed and approved by the persons interviewed.

(2) Three printed copies of the final, edited transcript will be sent to the Director for Joint History. Command historians should also make distribution to the Service history offices.

2. Content. Interviews will cover major activities and issues that involved the combatant commander during his tour. Special attention should be given to military operations or crisis situations, to command relationships and relations between the combatant commander and the Chairman of the Joint Chiefs of Staff, and to questions concerning changes in mission or the command's area of responsibility.

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