



# CHAIRMAN OF THE JOINT CHIEFS OF STAFF INSTRUCTION

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J-8

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CJCSI 5641.01

29 January 1999

## JOINT STUDY RESOURCING AND MANAGEMENT

References: a. CJCSI 3137.01, Series, "The Joint Warfighting Capabilities Assessment Process"  
b. JSI 5640.01, Series, "Contracted Advisory and Assistance Services"

1. Purpose. This instruction establishes policies and procedures for providing resources and managing Joint Staff and Joint Warfighting Capabilities Assessment (JWCA)-sponsored studies.
2. Cancellation. None.
3. Applicability. This instruction applies to the Joint Staff and JWCA teams.
4. Policy
  - a. Joint Staff and JWCA studies are collaborative.
  - b. Joint Staff and JWCA studies will use previous and ongoing studies that address the same or similar issues, as well as relevant analysis methodologies and techniques.
  - c. Rigorous analysis will be applied to resource and manage studies. The study plan will include the identification of participants, subject matter experts, and stakeholders. The plans will incorporate management controls (accountability) specifying cost, performance, and schedule criteria.
  - d. Study leads will coordinate study efforts with the executive agent for JWCA study resources and management (SRM) according to paragraph 5b below.

e. Joint policy and guidance on the role, organization, process interrelationships, management, and operation of the JWCA process is in accordance with CJCSI 3137.01A.

f. Policy, responsibilities, and procedures for fiscal planning, managing, evaluating, and reporting Joint Staff Contracted Advisory and Assistance Services (CAAS) remain according to JSI 5640.01.

## 5. Responsibilities

a. The Director, Force Structure, Resources, and Assessment Directorate will provide the resources to create, implement, and maintain the requirements described in this instruction.

b. The J-8 Deputy Director for Wargaming, Simulation and Analysis (DDWSA) will:

- (1) Serve as the executive agent for Joint Staff and JWCA SRM.
- (2) Monitor Joint Staff and JWCA studies.
- (3) Implement the spirit and intent of this instruction.
- (4) Provide assessments on proposed studies to the Vice Director, Joint Staff (VDJS), in his role as Joint Staff acquisition authority and Chairman of the Resource Management Council (RMC).
- (5) Recommend using related efforts, applying rigorous analysis, and using study management tools to track study milestones and enforce contract schedule and deliverables.

c. The Chief, Studies and Analysis Management Division as program manager for Joint Staff and JWCA study resources and management (SRM) will:

- (1) Report to and act as the DDWSA's primary agent to maintain and implement the spirit and intent of this instruction.
- (2) Be the Joint Staff focal point for maintaining cognizance of Joint Staff study efforts.
- (3) Recommend study collaboration regarding subject matter experts, stakeholders, participants, and analytic methodologies.

d. Joint Staff and JWCA study leads will become familiar with and adhere to the requirements, procedures, and intent of this instruction.

## 6. Procedures

### a. Study planning

(1) When a topic is identified for a study, the lead will contact the program manager for study resources and management (PM SRM).

(2) The PM SRM will

(a) As a consultant to the study lead, assist in defining study objectives, analytic tasks, and contract deliverables.

(b) Will assign the study effort a tracking number and a liaison officer (if applicable).

(c) Assist the study lead in developing a study plan that supports the defined objectives and deliverables. The study plan will include

1. The specific issues to be studied (what are the questions to be answered).

2. Identification of related studies and a plan of attack on effectively using those efforts.

3. Identification of subject matter experts.

4. Identification of required resources to satisfy study objectives.

5. Identification of appropriate quantitative and qualitative analytic methodologies.

6. Stakeholders identification and involvement.

7. Study schedule and deliverables.

(d) Assist the study lead in developing statements of work (SOW) to support the effort.

b. Study resources

(1) The PM SRM will act as a consultant to the study lead in developing the statements of work for the study.

(2) The Joint Staff CAAS program manager will review CAAS funding in accordance with JSI 5640.01. All CAAS requirements involving Joint Staff or JWCA studies will be submitted to the PM SRM for review and tracking prior to submission into the CAAS funding process.

7. Releasability. This instruction is approved for public release; distribution is unlimited. Department of Defense (DOD) components (to include the combatant commands), other Federal agencies, and the public may obtain copies of this instruction through the Internet from the Chairman Joint Chiefs of Staff Directives Home Page-- <http://www.dtic.mil/doctrine/jel/cjcsd.htm>. Copies are also available through the Government Printing Office on the Joint Electronic Library CD-ROM.

8. Effective Date. This instruction is effective 29 January 1999.

For the Chairman of the Joint Chiefs of Staff:

A handwritten signature in black ink, appearing to read "V.E. Clark", written in a cursive style.

V.E. CLARK  
Vice Admiral  
Director, Joint Staff

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