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Military History Operations

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MILITARY HISTORY OPERATIONS

Contents

Page

PREFACE v

Chapter

1 CONCEPTS AND PRINCIPLES 1-1
Use of Military History 1-1
General 1-1
Commanders and Staff 1-1
Training 1-1
Morale and Esprit 1-1
Public and Command Information 1-1
Development of the U.S. Army Historical Program 1-2
Early Years of the United States 1-2
Post–Civil War Era 1-2
Spanish-American War 1-2
World War I 1-2
World War II 1-2
Korean War 1-3
Vietnam War 1-3
Post–Vietnam War Era 1-3
Persian Gulf War 1-4
Outlook for the Twenty-first Century 1-4
Military History Missions 1-4
Execute Command Historical Program 1-4
Collect Historical Material 1-5
Advise on Historical Matters 1-5
Advise on Preparing Historical Records 1-5
Coordinate Matters Relating to Historical Artifacts 1-5

2 ROLES AND RESPONSIBILITIES AT HIGHER ECHELONS 2-0
Chief of Military History/Center of Military History 2-0
Military History Institute 2-0
Combat Studies Institute 2-1
Combatant Command Historians 2-1

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Joint Task Force Historical Support 2-1
Other Service Historians in the Theater 2-2
Air Force Historical Teams 2-2
Marine Corps Historical Teams 2-2
Navy Historical Teams 2-3
The MACOM and the MACOM Historian 2-3
Army Component Command Historian 2-4

3 THE ARMY MILITARY HISTORY OPERATIONS FORCE 3-1
Unit Commander 3-1
Historian (Corps and Below) 3-1
Staff Responsibilities 3-1
Command Historical Program 3-2
Unit History 3-2
Historical Information 3-2
Information and Advice 3-3
Organizational History File 3-3
Lineage and Honors Actions 3-3
Historical Artifacts 3-4
Historical Documents Collection 3-4
Records Management 3-5
Historical Reference Services 3-5
Unit Historical Officer 3-5
Staff Responsibilities 3-5
Command Historical Program 3-5
Organizational History File 3-6
Operations Data Report 3-6
Unit History 3-6
Historical Artifacts 3-7
Records Management 3-7
Military History Detachment 3-7
Assignment and Operational Control 3-8
Mission 3-8
Organization 3-9
Equipment 3-10
Concept of Operations 3-10
Special Historical Teams/Historians Deployed by the Center of Military History
or Other Commands 3-10
Army Artists 3-11
Historian Augmentees 3-11
Historical Artifact Recovery Teams 3-11
Related Units 3-12
Lessons Learned Teams 3-12
Public Affairs Detachments 3-12
Combat Camera Teams 3-12

4 DEPLOYING THE FORCE 4-0
Training Prior to M-Day 4-0
Automation Equipment 4-0
Security Considerations 4-0
Load Plans 4-1
In-Transit Historical Collection Opportunities 4-1
Explaining the Mission 4-1

5 MILITARY HISTORY OPERATIONS PRODUCTS 5-0
Historical Programs 5-0
Historian's Notes 5-0
Interviews 5-0
Graphic Materials 5-2
Army Art 5-2
Photographic Documentation 5-3
Journals and Journal Files 5-4
Command Report 5-5
Operations Data Reports 5-7
Historical Monographs 5-8
Annual History 5-8
Unit History 5-9
Unofficial Unit Histories 5-9
Special Designations 5-10

6 MILITARY OPERATIONS OTHER THAN WAR (MOOTW) 6-1
Contingency Operations 6-1
Peacekeeping 6-1
"Counter" Missions 6-1
Natural Disasters 6-2
Special Event Support 6-2

7 MILITARY HISTORY PLANNING 7-1
Joint Planning Process: An Overview 7-1
Deliberate Planning 7-2
Crisis Action Planning 7-3

APPENDIXES

A. Predeployment Checklist A-1
B. Historical Interview Checklist B-0
C. Sample Military History SOP C-0
D. Command Report Format D-1
E. Annual History Format E-0
F. Sample Historical Estimate F-1
G. Sample Historical Annex to OPLAN G-0

GLOSSARY Glossary-0
Abbreviations Glossary-0
Terms Glossary-1

REFERENCES References-0

ANNEXES

1. Photograph Log
2. Document Log
3. Historical Property Log
4. Interview Log
5. Standard Form 135, Records Transmittal and Receipt
6. DD Form 2266, Hometown News Release Information
7. DA Form 2609, Historical Property Catalog
8. DA Form 7273-R, Access Agreement for Oral History Materials
9. Interview Field Notes (on reverse side of DA Form 7273-R)
10. Cassette Case Cover
11. Photography Slate

PREFACE

Field Manual (FM) 1–20, *Military History Operations*, is applicable to all Army military history offices, military history units, and military history operations of major tactical and support commands generally at corps level and below. FM 1–20 provides basic doctrine describing the roles, relationships, organizations, and responsibilities of Army component command historians, historians, unit historical officers, and military history detachment (MHD) members in the United States Army. It describes, but does not extensively cover, historians and historical offices of units at echelons above corps and at the joint level. It is designed to provide historians, unit historical officers, commanders, and staffs the methods to preserve and document the history of the U.S. Army. It explains how the Army conducts military history operations during wartime, for both deployed forces in the combat theater and those units supporting the operation. The Army has responded to numerous contingencies or military operations other than war in recent years, and this FM provides doctrine on conducting military history operations during such contingencies. It also provides commanders doctrinal guidance on the employment of organic military history assets as well as separate military history units.

The primary users of this manual are force commanders, military history professionals, soldiers assigned the additional duty of unit historical officer, and soldiers assigned to MHDs. The manual provides guidance derived from regulations and other sources and gives techniques for the execution of military history operations. It reflects lessons learned in past operations and theories tested at the combat training centers.

The proponent of this manual is the Chief of Military History. Send comments and recommendations on DA Form 2028 directly to the U.S. Army Center of Military History, ATTN: DAMH-FPF, Fort McNair, DC 20319–5058.

Chapter 1

Concepts and Principles

USE OF MILITARY HISTORY

General

Military history is the collective memory of a unit or an entire armed force. Its use by units and individuals can teach valuable lessons from their recent past or provide unique insight into more distant times. This enhances unit performance and increases esprit de corps. The statement by philosopher George Santayana, "Those who do not learn from history are condemned to repeat it," has haunting implications in the profession of arms. General George S. Patton, Jr., stated, "To be a successful soldier, you must know history." A wise soldier learns from the past, both the successes and the failures. Military history is that link.

Commanders and Staff

Commanders and staff members can judge the effectiveness of current or planned operations by the study of related past actions. Although each combat action is unique, a review of actions against a similar enemy or a comparably organized and equipped opponent can provide useful insight. When planning future operations the commander and staff can compare operations in like terrain, weather, and environment to determine appropriate planning factors. In a related aspect, historical data is used in field manuals that provide statistical analyses to estimate logistical and personnel requirements in operations.

Training

Military history should be integrated into unit training for combat. Such use of history aids the soldier by showing practical applications and promoting confidence in solving problems. Most obstacles that face a novice in combat have been experienced before by other soldiers. The presentation of these historical analogies can bolster a new soldier to face the challenges of war. Training on sites of previous battles can provide vivid examples of how units and individuals met their responsibilities in the turmoil of combat. This tool broadens the outlook of today's soldiers and helps equalize the imbalances in personal experience.

Morale and Esprit

Military history inspires soldiers and adds to their pride in the military profession. An understanding of the qualities and successful actions of their unit and of individuals can help the members of the organization understand what can be achieved. Military history provides useful examples of outstanding leadership and its effects upon the organizational esprit. This knowledge helps to build great soldiers.

Public and Command Information

Military history is frequently used in public and command information activities. For the public, it reveals institutional experience that fosters confidence in the military. For the unit commander, it provides examples of individual and organizational successes that build and maintain pride and spirit. Recruiting themes frequently use military history as a centerpiece.

DEVELOPMENT OF THE U.S. ARMY HISTORICAL PROGRAM

Early Years of the United States

Military history has been used in the U.S. Army since the American Revolution. Those early sources were often produced abroad, primarily by civilian historians for the general reader. The information was adapted for the military's use through individual study and, later, through the professional military education process. It was not until the latter half of the nineteenth century that the U.S. Army began a formal collection of its historical experiences.

Post–Civil War Era

During and after the American Civil War, the War Department undertook a major effort to compile the official records of all units. The result, promoted by a congressional resolution in early 1864, was a set of 128 volumes of primary documents entitled *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies*, published between 1878 and 1901. Although these volumes continue to be a great source of facts for the soldier and civilian studying this period of U.S. military history, they present only the bare facts as reported by the commanders and do not attempt to analyze the actions of the antagonists. This crucial analytical step in the use of military history has been left to the novice and professional alike, since it was not part of the government project.

Spanish-American War

In 1902 the War Department published a two-volume account of the Spanish-American War, including the Philippine Insurrection and the China Relief Expedition. These volumes mirrored the Civil War *Official Records* in style and content. As with the Civil War records, this account was a reprinting of reports rather than an analytical study.

World War I

The 1903 order establishing the General Staff Corps in the U.S. Army also charged the corps with "the preparation of technical histories of military operations of the United States." In 1918 the War Department formed the Historical Branch under the control of the War Plans Division of the General Staff. This branch had the mission to write the history of the active participation of the U.S. Army in World War I. The War Department assigned additional sections to the headquarters of General John J. Pershing and the Services of Supply in France. Due to the rapid demobilization at the end of the war, these agencies were able only to collect,index, and preserve the official records prior to their inactivation. The government did not publish the official records of the American Expeditionary Forces until 1948. Again, this was a publication of raw data and not a historical analysis.

World War II

Less than three months into World War II, President Franklin D. Roosevelt directed that eleven executive departments and agencies of the federal government preserve their records and capture their administrative experiences of the war. The Army expanded this mission to include its operational experience. In August 1943, the Army reestablished a historical branch, this time within the G–2,Intelligence, General Staff Section.The Army leadership realized the need for a narrative analytical history of the Army in this war. To begin this undertaking, a committee met and established guidelines and missions.

The first mission was to perform a series of studies on specific military operations. The Chief of Staff, General George C. Marshall, wanted these studies circulated within commands engaged in combat as well as those preparing for or supporting the war. He wanted the individual soldier, especially those who had been wounded,to understand their part of the battles. To accomplish this, the Historical Branch activated and deployed a number of Information and Historical Service Teams to the theaters of operation.These units were the forerunners of today's Military History Detachments (MHD).Higher level commands also created history staff sections using assigned soldiers with a history background or, in some cases, personnel who were external to the command. This collection of historical information and its narrative writing of the operations became the American Forces in Action series. Between 1943 and 1947, the government published fourteen studies in this project.

A second mission was to write a comprehensive history of the war. This later became the United States Army in World War II series, frequently called the Green Books. To write this series, the Army established a separate Historical Division in November 1945, redesignating this agency as the Office, Chief of Military History (OCMH),in 1950.The U.S. Army in World War II series was ranked among the best scholarly works covering the war. The authors received open access to all documents.They had instructions to prepare their works without bias and to present both the successes and failures of the Army in a fair and unbiased way. As with the Civil War's *Official Records*, the government did not publish some of these volumes until almost a half-century after the war ended. But this time, the resulting coverage was analytical.

Korean War

The major commitment of U.S. Army forces into the Korean peninsula in 1950 expanded the mission of OCMH.The organization received the directive to produce a narrative history of the conflict,to include the joint command in the Far East.Historians were assigned to combat headquarters, and historical teams deployed to the theater. MHDs were particularly active in collecting historical material. OCMH prepared two narrative-pictorial histories and two volumes on small unit actions, as well as a five-volume historical account comparable to the World War II series.

Vietnam War

In 1965 the United States began sending large numbers of troops to the Republic of Vietnam. By this time, OCMH was the Army's focal point for military history, and the agency created a special section to cover the conflict.MHDs deployed to support the divisions and separate brigades in the field.These actions helped the various staffs preserve the records needed to prepare a narrative history of the war.

Post–Vietnam War Era

The 1970s and 1980s brought major changes to the U.S. Army, and history played an important part in the upgraded professional education program. Soldier-oriented activities such as the staff ride brought history into the everyday life of the troop leaders. An awareness of the use of military history began to make a greater impact on the production of training-and-doctrine publications.

There were two major rapid deployment operations in the 1980s. It should be noted that in both instances, although they were predominantly Army operations, both were joint operations in every sense of the word.

In 1983 Army Rangers and a portion of the 82d Airborne Division conducted an assault on the small Caribbean nation of Grenada. During the operation, planned in great secrecy and carried out within a matter of days,historical support was limited to unit historical officers. Other historians supported the effort after the fact.

Under similar circumstances, the historical community had very limited knowledge of the assault on Panama in 1989 by elements of the XVIII Airborne Corps and other continental United States (CONUS) and forward-deployed units.The corps historian participated in the action, but other Army historians had to be content with conducting postoperation historical activities.

Persian Gulf War

In 1990 Iraq invaded Kuwait, and as part of the world response, U.S. combat forces made their most rapid large-scale deployment to that time.The initial response of the historical community was with MHDs.By early 1991, individual historians had also deployed to fill unit historian positions at the army, corps, and major support headquarters.The field historians primarily focused on collecting documents and creating primary source material for subsequent written works. Unit histories were written by deployed field historians and unit historical officers.The analytical,operational histories will be written by CMH and other historians.

Outlook for the Twenty-first Century

The Army Historical Program (AHP) for the twenty-first century will demand the coordinated efforts of all soldiers and civilians involved in the program, from the Army chief of staff to the battalion historical officers. Recording and preserving the history of the Army in an era of rapid developments in information technology gives the AHP team an unparalleled opportunity to produce accessible, interactive sources of historical information. The increase in the availability of historical programs, products, and near-real-time data links demands that Army historians seek out innovative methods to anticipate and respond to the needs of Army decision-makers. Soldiers at all levels must be trained to study and use military history to their advantage.All soldiers and civilians involved in military history operations must work in concert to preserve the heritage of the past and serve the soldiers of the twenty-first century.

MILITARY HISTORY MISSIONS

Execute Command Historical Program

The tactical Army executes military history operations.The most important military history operations mission is the planning and execution of a command historical program. This occurs throughout all levels/echelons of the Army. At the highest level, the chief of military history plans and executes the AHP for the secretary of the Army and the Army chief of staff. An example at the intermediate level is a full-time civilian in the position of command historian executing a Major Army Command (MACOM) commander's program. An illustration at the lower echelons is a soldier in a battalion with the additional duty, as unit historical officer, of preparing the annual historical summary. Each level of command down to separate brigades and armored cavalry regiments,as well as Ranger regiments and Special Forces groups,has a historical program, be it a formally written plan or merely the acknowledged need to preserve the record of the unit.

In wartime, the historical program is absolutely essential. Accounts of battle are studied afterwards for decades, sometimes centuries, to find doctrinal applications, to refine lead-

ership principles, and to write unit histories. Units must have a systematic plan to collect and record history, lest their important lessons learned go uncirculated or their accomplishments fall into obscurity.

Collect Historical Material

In addition to documents and records, many items are of vital importance to historians. These items include maps, map overlays, newspapers, and other items not covered in the Modern Army Recordkeeping System (MARKS). Additionally, oral history interviews and a command chronology should be collected. Military history operations focus on the collection, cataloging, transportation, and storage of significant historical material. By keeping good notes on how and why these historical materials were collected, the historian will provide insights useful for later review and publication.

Advise on Historical Matters

This mission has two parts. Historians on warfighting staffs must provide historical information to commanders and various staff agencies. They must also advise commanders on how to improve the historical programs of their subordinate units. This may include, but is not limited to, the historian conducting staff assistance visits at these units.

Advise on Preparing Historical Records

By regulation, units and staff sections keep records of their activities. Some of these records have special historical significance. An important aspect of the military history mission is to ensure that these records are as accurate and comprehensive as possible. At various periods in the history of our nation, the Army has collectively performed this task very well. At other times the Army has received adverse publicity because vital records were not collected, forwarded, or properly catalogued and maintained.

Coordinate Matters Relating to Historical Artifacts

An important military history operations mission is to collect historical artifacts and to maintain control of these artifacts until they are properly accessioned into the Army Museum System (AMS) or the unit's historical holding. Historical artifacts are to be used for training, research and development, and interpretation of the Army's military and cultural heritage.

Chapter 2

Roles and Responsibilities at Higher Echelons

CHIEF OF MILITARY HISTORY/CENTER OF MILITARY HISTORY

The chief of military history manages the Army Historical Program (AHP) and is the principal adviser to the secretary of the Army and the chief of staff, Army, on all historical matters. He is the commander of the U.S. Army Center of Military History, a field operating agency under the chief of staff, which receives general staff supervision from the director of the Army staff.

The chief of military history develops and executes the AHP. In his advisory role, the chief of military history issues guidelines, enforces standards, and coordinates the execution of Army historical matters.

The Center of Military History (CMH) prepares the official history of the U.S. Army in peace and in war, along with other historical works; determines and publishes the lineage and honors of specified Army units; and determines the official designation of Army units and maintains historical data on all Army units.

The chief of military history ensures accountability of all Army historical artifacts, provides staff supervision of the AMS, manages the Army museum certification program,and advises commanders on museum matters.The chief of military history manages Army art activities and the Army Art Central Collection.

The chief of military history develops collections of historical source materials dealing with the Army and related activities. He establishes policy and standards for and promotes and coordinates Army oral history programs,including the conduct of selected oral history interviews.

The chief of military history provides overall direction for military history education,promoting the study and teaching of military history.

The chief of military history provides staff supervision over military history operations, including doctrinal and organizational proponency for MHDs. He is the proponent for uniformed and civilian historians and curators.

MILITARY HISTORY INSTITUTE

A part of the Army War College, the U.S. Army Military History Institute (MHI), Carlisle Barracks, Pennsylvania, collects, preserves, and provides to researchers and scholars source materials on American military history. As the Army's official central repository for non-record historical source material, the institute strives to perpetuate the history and traditions of the Army, its role in the development of the United States,and the deeds of the men and women involved in its development. MHI will also assume responsibility for the Army Heritage Education Center in the near future.

COMBAT STUDIES INSTITUTE

The Combat Studies Institute (CSI), Fort Leavenworth, Kansas,provides the foundation for military history studies at the Command and General Staff College by presenting instruction in military history. This instruction is designed so as to examine, in depth, the evolution of military theory, the art of war, and the nature of battle.The faculty of CSI is also charged by the U.S. Army Training and Doctrine Command (TRADOC) commander to undertake original historical investigations of subjects of relevance to current doctrinal and operational concerns of the Army.

COMBATANT COMMAND HISTORIANS

The Joint Chiefs of Staff (JCS) History Office provides historical coverage for the Joint Staff and coordinates historical matters with the combatant command historians.

With certain exceptions, responsibility for the conduct of contingency operations by the U.S. military has been divided among the geographic combatant commands. These commands are: U.S. Pacific Command (USPACOM), U.S. European Command (USEUCOM), U.S. Joint Forces Command (USJFCOM), U.S. Southern Command (USSOUTHCOM), and U.S. Central Command (USCENTCOM). Although there are other unified commands,the combatant commands are the ones in which Army historical asserts will normally perform their mission. Each of the combatant (unified) commands has subordinate service component headquarters.

The headquarters of each unified combatant command has a command history office staffed by one or more civilian historians. The senior civilian historian serves as the command historian of the unified command and is the senior joint historian throughout the unified command's geographic area of responsibility. When appropriate, the unified combatant command historian will serve as the theater historian. As such, the unified command historian is responsible for the development of historical policy and planning for the unified command and for the execution of joint historical operations within the unified command's geographic or functional area of responsibility. The unified command historians receive augmentation from the services in order to provide historical coverage of joint operations.

The responsibilities and operations of the joint historians are separate from those of the service component historians. Joint historians are not responsible for the historical coverage of the service components within their unified combatant commands.However, in all cases, close coordination of joint and service component military history operations is essential to prevent duplication and to provide for the widest historical coverage of the operation.

JOINT TASK FORCE HISTORICAL SUPPORT

The joint task force (JTF) designated by the commander of the geographic combatant command in whose area of responsibility the operation is to take place usually controls contingency and humanitarian operations. Historical coverage of the JTF headquarters is a joint responsibility. At the direction of the commander of the supported unified combatant command and under the staff supervision of the unified command historian, the JTF will include one or more historians assigned to its headquarters for a contingency or humanitarian operation.

Ordinarily, the JTF historian will be a senior historian (O–6 or O–5) or civilian equivalent (GS–15 or GS–14) from the same service as the JTF commander. The JTF historian will serve on the JTF staff as a special staff officer working for the JTF chief of staff.

Depending upon historical requirements,the JTF historian may request the assignment of additional historians.Historians assigned to the JTF headquarters and to other temporary joint duties are normally drawn from the reserve components.

JTF historians have specific responsibility for providing historical coverage and support to the JTF headquarters. While they coordinate their activities with service historians, JTF historians are not responsible for the historical coverage of the service components of the JTF. Each service provides historical coverage for its component.

OTHER SERVICE HISTORIANS IN THE THEATER

Air Force Historical Teams

The Air Force Historical Research Agency (AFHRA) maintains two permanent contemporary historical information preservation (CHIP) teams to deploy during contingency operations. The teams perform three vital functions: collect and organize data, scan documents, and interview key people. The CHIP team provides the Air Force history program a rapid reaction force to augment its field historian program in surge combat operations. The team's mission is to support the field historian as well as the theater commander.

In addition,the AFHRA supports the joint history program on an ad hoc basis during JTF operations. Normally, one- to-three person joint history teams are dispatched to the theater of operations. Joint history teams may include individual historical personnel from other branches of the armed services, or they may link up with Army MHDs for mutual support and transfer of information and documentation.

Marine Corps Historical Teams

The Marine Corps Historical Center trains, organizes, equips, and deploys historical teams drawn from Marine Corps Reserve historians assigned to the Center. Marine Corps Reserve historians and artists are an integral part of the center's History and Museums Division.They deploy as field historians and artists assigned to Marine operational units or as members of joint history teams, special writing projects, or other special assignments. There are two reserve organizations set up as part of the division's Field Operations Branch; both having similar missions, but the category of reservists in the two units differs.

The Individual Mobilization Augmentee (IMA) Detachment assists the director for Marine Corps history and museums to record, preserve, and disseminate the cumulative operational and institutional experience of the Marine Corps. When fielded, these historians and artists deploy either as individuals or as members of historical teams. The types of material collected include historical property, documents, maps, overlays, photographs, audio and video tapes, and relevant computer discs.

The IMA Detachment is made up of members of the Organized Marine Corps Reserve who attend drill once a month and annual training duty for two weeks each year. It has been the practice in the Marine Corps to have historians assigned to operational units on their annual training duty to provide them real-world experience. Members of the IMA Detachment are at a higher level of training and readiness for mobilization and deployment.

Members of the Mobilization Training Unit are categorized as Individual Ready Reservists who do not meet regularly for drill but are liable for mobilization. Persons

assigned to these organizations are required to have advanced degrees in history or, in the case of artists,to have extensive portfolios of their work.The one exception to these criteria is the assignment of a computer specialist with duties focused on developing and implementing a fully automated,state-of-art system for the Historical Center as well as for field historians.

Navy Historical Teams

The Naval Historical Center deploys historical teams, task-organized from members of Naval Reserve Navy Combat Documentation Detachment 206. Navy historical teams focus on collecting documentation, which includes conducting oral history interviews and obtaining photographs and artifacts. Operations or events of special significance may also be documented by a Navy combat artist.Most teams cover actual operations,but some will deploy to cover fleet exercises of special significance, reorganizations of major commands and base closures,or starts or stops of new programs. Teams are assigned directly to a senior naval or joint commander and usually depend entirely on the supported command for logistics and administration.

Upon completing their mission, teams return to the Naval Historical Center and disband. Materials returned to the center go, as appropriate to their nature, into the Operational Archives,the Photographic Branch,or the Navy Museum.The branches of the center catalog all materials and make them available for research or display, subject to restrictions imposed by security classifications or private donor agreements.

Teams vary in size from one to several members.A Navy captain (O–6) is usually the team leader. Members of this unit complete a formal qualification program that includes both specified technical training during drill periods and at least one two-week period of annual training. Training specifically prepares all unit members for overseas deployment. Full qualification for officers includes designation with the Navy Officer Billeting Code 2415, Historian.

THE MACOM AND THE MACOM HISTORIAN

The commanding general of a MACOM establishes and supports a military history office staffed by professional historians or historical officers IAW AR 870–5.The MACOM historian is the senior historian throughout that command.The command historian collects and preserves the institutional memory of the organization. He/she is the expert on the history of that organization and prepares annual command histories and historical monographs and coordinates the MACOM history program. MACOMs usually have history offices at major subordinate commands to execute the command's historical program and to perform required historical functions.

MACOM commanders ensure that military history is applied to leader development. Those instructors who teach leadership courses ensure that historical examples are integrated into their classes. Staff rides,battle analyses, and book study groups are part of professional development programs in tactical units.Training funds may be used for these historical activities because they are considered unit training.

The MACOM historian must also plan for appropriate transition of the history office or other history assets to a war or increased readiness status.This could include the deployment of Department of the Army civilians. The MACOM also provides for the control and disposition of historical artifacts.

ARMY COMPONENT COMMAND HISTORIAN

The Army component command historian (ACCH) is the senior historian in the Army component of a joint operation. The ACCH is responsible to advise the Army component commander and supervise implementation of the commander's guidance on all Army military history operations in that theater. Other Army agencies may simultaneously deploy historians to the theater to supplement the efforts of the ACCH and subordinate historians.All deployed historians should operate with a spirit of cooperation so that historical data is preserved for the long-term interests of the Army and American society. However, the ACCH should always coordinate his/her activities with the MACOM historian, where appropriate.

An Army component command history office should consist of an ACCH, one or more professional Army historians, and appropriate support personnel. When historical functions are performed by an Army historical officer, the officer should have the specialty identifier (SI) 5X (historian), per AR 611–101, *Personnel Selection and Classification: Commissioned Officer Specialty Classification System*.

The ACCH serves as a special staff officer and works under the direction of the chief of staff or the secretary of the general staff. Both of these officers have a broad picture of operations, and both can assist with ensuring that the ACCH participates in staff operations and has access to information from all sections.

An advantage to having the ACCH work directly for the chief of staff is that it allows for easier access to the command group and all staff agencies. The collection of historical material at echelons above corps is so complex that the assignment of the ACCH to one staff section could be detrimental by limiting the historian's focus/access to information.

The following chart shows the chain of command for historians at different echelons.

FIELD ARMY HISTORICAL ARCHITECTURE

ARMY COMPONENT COMMAND

Command Group
Chief of Staff
Command Historian
Attached MHD(s) and/or historian(s)

CORPS

Command Group
Command Historian
Attached or supporting MHD(s) and/or forward-deployed historian

DIVISION

Command Group
Command Historian
Attached or supporting MHD(s) and/or forward-deployed historian

BRIGADE

Command Group
Historical Officer
Supporting MHD or forward-deployed historian

Chapter 3

The Army Military History Operations Force

UNIT COMMANDER

Commanders are responsible for the creation, collection, and preservation of historical records and for the preparation and publication of historical reports. When a full-time, professional historian is not assigned to the unit, the commander designates a historical officer to perform or supervise the accomplishment of all historical requirements.The unit commander is responsible to identify and accept responsibility for historical artifacts, which must be reported to CMH.

HISTORIAN (CORPS AND BELOW)

The historian is responsible for documenting the history of the command. The historian serves as a special staff officer and is normally assigned to the command group. At corps level, the historian is normally a DA (DA) civilian professional historian (GS–170 series). At the division level,an officer with skill identifier 5X (military historian) or a civilian professional historian serves as the historian.

Staff Responsibilities

The historian's specific responsibilities include, but are not limited to:

- Supervises subordinate historians and historical officers as well as all attached MHDs.
- Prepares the unit's history.
- Supervises the command's historical activities.
- Injects historical perspective and institutional memory into unit activities.
- Collects and maintains (as soon as possible) copies of staff journals, plans and orders, and after-action reports.
- Coordinates collection of historical artifacts acquired during operations.
- Prepares special studies or reports based on assembled historical material.
- Maintains a historical research collection adequate to support the historical mission.
- Establishes and maintains liaison with other historians, as required.

The historian maintains the institutional memory of the command and ensures the use of historical information, insights, and perspective in the decision-making process and in other functions and programs.The historian uses military history to improve training, support leader development, promote morale and esprit de corps, and foster historical-mindedness among all members of the command.

Prior to any contingency, the historian must familiarize himself with the key commanders and staff and have a regular working relationship with them.The historian must be familiar with the decision-making process of the command and attend key sessions, taking notes on the conversations,which are often not recorded in any other medium.The historian should deploy with the unit,or send another qualified historian,to ensure that the historical record of that operation, contingency, or war is properly preserved.

The historian is a staff officer and must support the commander without sacrificing objectivity. As a member of the team,the historian must give maximum assistance to the accomplishment of the commander's missions.

The historian must review the operational situation in the headquarters on an ongoing basis. He/she should attend meetings such as:

- commander's daily update
- shift change briefings
- G–3 plans daily meetings

Command Historical Program

The historian, as a staff officer, is the primary adviser and expert on historical matters within the command. The historian will coordinate all historical actions at the unit staff level and provide assistance to subordinate units. A detailed program to accomplish the historical mission must be prepared and disseminated to all levels of the unit. This program will be based on higher headquarters plans, and in the absence of definitive guidance and directives the historian must develop an internal program. The best way to set forth such a program is in a short standard operating procedure or a command policy letter. (See *Appendix C*.)

Unit History

The historian is required to research and write annual command histories or, during wars or contingencies, command reports.These are well-documented, comprehensive narrative accounts of the unit's history during a certain time frame.

The unit may, from time to time, publish a summary of its past history, highlighting its past accomplishments and lineage.These summary histories tend to serve more for public affairs and morale-building purposes than as solid, analytical histories. However, there is nothing to preclude the unit from writing an objective summary history as opposed to using the yearbook approach.

Historical Information

The historian ensures important historical documents are preserved. He/she must:

- read and collect the situation reports and intelligence summaries each day.
- go through the reading file and make copies of important historical documents.
- collect order of battle data.This enables the historian to keep track of which units are in the command and where they are located.This information will enable other historians to track task organization and any other changes.
- develop and maintain a chronology for the unit.
- maintain data on key personnel.This allows the historian to keep track of who is in the various command and staff positions and to plan and accomplish a comprehensive interview program.
- build a map and map overlay library. Exact maps and overlays are critical resources for research and writing.
- Assemble a technical data reference file, including open-source data on the characteristics/capabilities of land, sea, and air weapons systems. Over time, this file will also include tactical markings and serial numbers of specific vehicles that played a significant role in the operation.
- collect information on the enemy to enable future historians to document what was known about the enemy at the time of operations.

The historian can assist in the unit's critical analysis of its operations. In executing all inherent duties, the historian will soon become one of the most knowledgeable members of the staff, who can compare decisions and actions that are planned through a study of past operations. Historical studies on the units' plans, policies, and doctrinal issues can enhance unit performance. By attending staff meetings and operational briefings, the unit historian can determine which material would be beneficial and provide it in a timely manner to influence the decision-making process. The historian must use initiative and be aggressive to perform this role; other staff members will not seek out the historian during the planning process.

Information and Advice

The historian should be familiar with Field Manual 101–5, *Staff Procedures*. Historians will advise staff elements on the historical adequacy of their portions of operational reports and daily staff journals.They will assist the staff by performing technical inspections of records to ensure that they are properly maintained and preserved within the command.

Historians should maintain liaison with their counterparts from higher headquarters,adjacent units, and subordinate headquarters,as well as with joint historians,other service historians, and those of allied nations. Additionally, the historian must be closely linked with the curators of Army museums, which contain holdings pertaining to particular units.

At a minimum this program includes required reports,maintenance of the Organizational history file (MARKS file 870–5a), lineage and honors actions, historical artifacts, historical records management, and historical reference services. The program includes other aspects such as historian's notes, interviews, photographic documentation, and Army art.

Organizational History File

The historian maintains the unit's organizational history file IAW AR 870–5 and AR 25–400–2. The organizational history file is separate and distinct from any operational records/files. The organizational history file remains the *unit's property* until the unit is inactivated.The file is then sent to the U.S. Army Center of Military History (DAMH-FPO). A daily chronology, no matter how primitive, is the first item in this file. This chronology should be an extremely condensed narrative of the significant events that occurred within the command on each day. In essence, the chronology is the unit's diary. It should supplement, not replace, the unit's journal.

It is critical to retain all orders directing unit movements, attachments, detachments, and reorganizations. Copies of the command reports and other significant historical documents are also placed in the file. Orders for significant individual awards and unit awards, with the recommendations, should be included.This file will be used during and after the operation to verify the unit's authorizations for inclusion in official lineage and to justify honors for the unit. It may also be used as a reference for questions on the past service of individuals.

Systematic organization and maintenance of the organizational history file is essential. To be an effective member of the staff, the historian must be able to produce specific documents on demand.

Lineage and Honors Actions

All credits for lineage and honors must be documented by orders, normally produced by the senior headquarters. Historians at all levels should monitor the receipt of these orders and maintain a copy in their organizational history file.The senior Army headquarters in

the combat theater will be required to provide CMH a list of all units that participated in the operation,including the unit designations and their unit identification codes (UIC), as well as their arrival and departure dates from the theater. The tracking of units becomes especially challenging as provisional units arrive and the headquarters forms task forces.

Historical Artifacts

Units will often collect items of historical significance during operations.These items may be friendly or enemy equipment from the combat area. The historian must provide staff guidance concerning historical artifacts and war trophies and ensure that unit members and subordinate unit historical officers are aware of the difference.

The historian represents the AMS. He/she will assist the unit commander by identifying historically significant artifacts and ensuring that they are properly accessioned. The historian can expect to receive collection instructions from the ACCH about obtaining specific items based on DA and senior Army headquarters guidance. Other Army agencies may also identify specific items they wish to have collected.

Equipment associated with historically significant events or personages should be identified and documented as completely as possible. Items that are accepted as historical artifacts must be brought under proper control by the unit. In the combat area, coordination may have to be made for their shipment from the theater. The historian should periodically compile a listing of artifacts and send it through historian channels to CMH. Historians should consult AR 870–20 for all matters concerning historical artifacts.

Historical Documents Collection

An important responsibility of the historian is to ensure that copies of important historical documents from the unit files are preserved for the production of historical reports and future research. DA will provide document collection guidance and the ACCH will develop a document collection plan that will provide comprehensive collection guidance for all Army elements in the theater.

The most critical documents are the daily staff journals,basic operations plans and orders, slides from key briefings, and a full set of fragmentary orders.The historian must prepare a list of the fragmentary orders, noting any that were issued out of sequence and tracking message times to the minute.

During operations, friendly units may capture significant enemy documents.The priority for the use of these files remains with the military intelligence channels.However, the historian should identify these files and maintain a record of their disposition for future historical research. Access to these items will be essential so that future historians can write balanced, comprehensive histories of the operation. Historians should attempt to make copies of the most significant documents.

The military is increasingly reliant on computers for documentation. While this can simplify collection, it also makes the information more perishable. Unit staff members often overwrite documents as new information becomes available. Unless advised to preserve all records, clerks may not retain current information. The historian must always have a supply of computer disks to copy files. It is absolutely essential that the historian attempt to organize and catalog these files as they are collected. However, the lack of complete and detailed catalog information on documents already collected should not preclude the historian from collecting other important documents. Collecting important historical documents is the main priority.

Paper is still a primary way to transmit information. This is especially true in forward-deployed combat units.The historian must focus on journal logs,facsimiles (FAX),e-mail, memorandums, and "buck slips."These documents and hand-written notes on them often indicate when the information was received, who acknowledged it, and when actions occurred.

Records Management

Records managers in the theater or the Records Management Declassification Agency (RMDA) will provide guidance on what records have been designated as permanent and may provide unique disposition actions not listed in current regulations.

At the tactical level, the deputy or assistant chief of staff for information management or the G–1/S–1 has the responsibility to implement these instructions. The historian should be prepared to advise the staff on the historical value of the organization's records. Records managers and units use AR 25–400–2 to guide them on records disposition.The historian should be fully familiar with MARKS but should not feel restricted when advising units on retention of pertinent historical documents which may not be covered by MARKS.

Historical Reference Services

No matter what the operation, it is likely that the U.S. Army or other armies have conducted similar operations in the past.The historian can provide valuable lessons from the past to reinforce success or to help avoid previously committed errors. It is unrealistic to expect a forward-deployed historian to conduct intensive research, but there are extensive historical research resources within the Army History Program and worldwide web sites are available through the Internet.

UNIT HISTORICAL OFFICER

Division-level-and-above units are required by AR 870–5 to have full-time military or civilian historians. At brigade level and below, or in units that do not have full-time historians, the historian responsibilities are performed as an additional duty. This individual is designated as the unit historical officer and is the key person in the execution of the unit's historical program.This soldier should have a basic educational competency in history and be enthusiastic about preserving the unit's historical role in the operations.

This soldier must be deeply involved in the unit's mission in order to capture an accurate and comprehensive history of the unit's role in the operation. Experience has proven that the best position for the historical officer is as a member of the S–3 section at brigade or battalion level.

Staff Responsibilities

The historical officer compiles the unit's input to higher headquarters for historical reports and maintains the unit's organizational history files. During combat, this individual must have a firm understanding of the unit's plans and significant activities.

Command Historical Program

The historical program at this level includes the organizational history file, unit historical reports,lineage and honors actions,historical artifacts,and historical records management.

Organizational History File

Each commander will have documentary evidence of the organization's history, traditions, and right to organizational historical artifacts. For this reason, organizations retain copies of significant documents, photographs,and other items pertaining to their history and traditions. Commanders of color-bearing organizations will include information concerning their organic elements in their organizational history files.

The historical officer will maintain the unit's organizational history file in accordance with Army records management policies. At battalion and company level, the file should include lists of assigned and attached soldiers. The organizational history file is the unit's institutional memory and a critical resource for writing unit histories.This file will also be used during and after the operation to verify the unit's authorizations for receipt of official honors and as a reference for validating individuals' past service.

Organizational history files normally include the following:

- Statements of primary and secondary missions
- Daily chronology of unit activities, events, and achievements
- A listing or documentation of significant unit events
- Copies of Lineage and Honors Certificates
- Unit histories
- Annual histories
- Operations data reports
- Data on organizational flags,coats of arms, and insignia
- Citations for unit decorations
- Media-related items, to include newspaper and magazine clippings, with sources and dates
- Unframed photographs, pictures, certificates, letters, and programs, which should be identified with dates, names, places, events, and other relevant information
- Names and ranks of commanders, with dates of assumption and relinquishment of command
- Unit rosters (battalion level and below)

Operations Data Report

The operations data report (ODR) is an annotated chronology of the unit's operations that will be fully supported by an indexed set of copies of key historical documents.The historical officer will compile ODRs and, if required, submit them in lieu of the command report. Command reports, in contrast, are usually researched and written by professional historians. They are narrative and analytical histories of the operations. CMH or the ACCH will instruct the unit historian when ODRs are to be accomplished and what time period they will encompass. One copy set of the ODR and its supporting documents will be made a part of the unit's organizational history file, while a second copy set will be forwarded through channels to CMH.The ACCH and other intermediate headquarters historians may also require copy sets.

Under the current AR 870–5, the historical officer is required to submit an annual historical summary during peacetime or a command report during wars or contingencies.

Unit History

The historical officer should ensure that a summary unit history is available, which outlines the unit's origins and past history as well as explaining what the unit did to earn its

campaign credits. Units frequently publish short, easy-to-read unit histories for their members soon after hostilities cease. During extended operations,units may publish interim historical pamphlets as operations continue.

Historical Artifacts

Units may obtain friendly and enemy historical artifacts during combat and contingency operations.The historical officer represents the commander by identifying historically significant artifacts. Historical artifacts must be brought under proper control in accordance with procedures outlined in AR 870–20.In a combat theater, the historical officer may also have to coordinate shipment of the artifacts from the theater. The historical officer should periodically forward a listing of the historical artifacts collected to the first command historian in the unit's chain of command.

The historical officer may be required to explain the difference between historical artifacts and war trophies.The first belongs to the U.S. Army while the second belongs to individual soldiers. No unit or member of the U.S. Army may take private property from civilians. Religious and cultural material may not be taken as historical artifacts or war trophies.

- Historical artifacts are objects with historical significance belonging to the U.S. Army, to include uniforms, equipment, accoutrements, personal effects, weapons, vehicles,artwork,and any other object that constitutes evidence of battle experience or other military activity of significance to the United States.
- War trophies are objects authorized by regulations and command policy to be taken home by individual soldiers as war souvenirs. These include individual items of enemy clothing, personal equipment, small nonfiring components from destroyed vehicles,propaganda leaflets,and similar objects. Federal law and appropriate Army regulations should be consulted when taking weapons as war trophies.

Records Management

The historical officer must coordinate with all staff sections to ensure the proper retention and retirement of the unit's files. It is absolutely essential that the historical officer ensure that operational reports reach the unit records manager, who is often in the S–1 section.

MILITARY HISTORY DETACHMENT

A military history detachment is a small, independent unit that collects historical material to supplement the historical records of Army units in the field. In combat and contingency operations, the basis for allocation is one MHD assigned or attached to each theater army, corps,division, separate combined-arms brigade, armored cavalry regiment, and logistical or support command.

MHDs are table of organization and equipment (TOE) units consisting of three soldiers. Although they bring all of the equipment they need to accomplish their mission,to include organic transportation, they are attached to a host unit for support.

The historical data gathered by the MHDs will be used to write the history of the U.S. Army. MHDs provide input for the objective military history that will be prepared by the professional staff of CMH and by other historians in the Army Historical Program.This history is used to inform the general public and to provide civilian and military scholars with reliable historical studies and source materials. It also will help provide the basis for developing future Army doctrine, training, leadership, organization,plans,as well as material and management techniques.

Assignment and Operational Control

MHDs are assigned by FORSCOM to MACOMs and/or theater armies (strategic tailoring).The receiving commander, normally on the advice of the ACCH,may then attach an MHD to or assign it a standard or nonstandard tactical mission in support of appropriate subordinate unit (tactical tailoring).If a support mission is assigned,the MHD normally is placed under the operational control (OPCON) of the supported subordinate unit for administration and logistics only.

There are four standard military support missions: general support (GS); general support/reinforcing (GS/R); reinforcing (R); and direct support (DS). These missions are defined by various criteria in combat engineer and artillery operations,the most important of which, for MHD command and control purposes, are establishing which echelon has priority for MHD support and designating which echelon is responsible to provide the MHD with combat service support.

Historically, the most appropriate command and control arrangement for MHDs has been for the MHD to respond in priority first to the guidance of its assigned parent unit (normally the ACC), then to the designated supported subordinate element (a corps, division, or brigade).This is similar to the GS/R mission, which places the MHD in general support of the ACC but reinforcing one designated subordinate element. Then the MHD normally is placed under OPCON of the supported unit solely for its limited CSS needs.

Once attached, the MHD commander works for the supported unit's historian until the command relationship is redefined by the ACC. If assigned a GS or GS/R mission, the MHD may temporarily be diverted or recalled by the ACCH,then returned to work with a subordinate or supported unit. This flexible arrangement facilitates transition if the MHD will be needed temporarily or intermittently to support either the parent unit or a different subordinate element.

The MHD commander should focus on field collection rather than serving as a staff officer, which is the role of the unit historian. The MHD has tactical mobility and should operate throughout the supported unit. This is its great advantage over other historical assets. Holding the MHD back from the maneuver elements would hinder it from covering important aspects of the operations.

In instances where there are insufficient numbers of MHDs, they may be pooled at the theater or corps levels. When the ACCH elects to pool the MHDs,they are dispatched as necessary to cover activities in the area of operations.In such cases,MHDs remain in general support and under direction of the ACCH and are under OPCON of the various subordinate units at which they are working, for administration and logistics only. The ACCH must clearly articulate the extent to which MHD commanders are to perform historian duties in the subordinate unit.

Mission

The primary missions of the MHD are to collect, preserve, and assist or advise. MHDs provide historical coverage of specific military units or specific military activities as directed by the ACCH. To provide such coverage, MHDs:

- Collect documents, maps, photographs, video and audio recordings, artifacts, electronic media, and other historical material that may not be preserved through the records retirement process (see AR 25–400–2 for unit record-keeping responsibilities).
- Create primary historical material through interviews and photographs that supplement the information found in regular military records.

- Conduct special projects such as after-action interviews for subjects not treated in regular reports and documents.
- Forward raw material produced or collected to the ACCH and CMH for processing and evaluation.
- Develop and maintain a chronology for the supported unit, if appropriate for the operation.

At the direction of the ACCH or CMH, MHDs also:

- Collect specific information for projects being undertaken by higher historical offices.
- Prepare short monographs on selected operations, battles, activities, or problems.
- Augment existing historical sections.

Additionally, the MHD provides direct assistance to supported commands in the following areas:

- Advise and assist in records management, especially regarding historical files (daily journals, plans, and files).
- Advise and assist in the planning and preparation of historical reports such as command reports, annual historical summaries, and operations data reports.
- Identify special tactics, techniques, expedients, and improvisations in short studies of immediate value.
- Prepare and assemble historical material to aid in the briefing and training of new personnel of the supported unit.
- Establish a reference service to provide supported units with historical information relating to their current operations.

Organization

The detachment is a mobile unit capable of fulfilling its missions with minimum support. As described in TOE 20–17, an MHD consists of one officer and two enlisted personnel. While the military occupational specialty (MOS) and authorized rank of these soldiers have frequently changed, the required capabilities have been altered very little since the deployable historical team concept was first fielded in 1943.

Currently, the MHD commander is a major (O–4),branch immaterial.This officer should hold the 5X skill identifier, which reflects professional academic training in the field of history. Regardless of academic background, the officer should have training in historical research or related activities and be familiar with the rules of evidence.The officer should also be familiar with the organization and operations of the supported units as well as the Army records management system.

A sergeant, first class (E–7), serves as the photojournalist. In addition to being trained in interviewing and photography, the photojournalist should be familiar with military organizations and operations. An interest or background in history would be a plus.The public affairs supervisor holds the 46Q MOS, Public Affairs Journalist.The third position in the MHD is the administrative assistant, filled by a staff sergeant (E–6), who also holds the 46Q MOS.

Because of the small size of the MHD, it is important that all unit personnel be cross-trained to conduct interviews, take photographs, advise on records management, and pro-

vide historical information. All personnel should be cross-trained as much as possible so that the absence of one individual will have minimal effect on unit performance.

Equipment

MHDs are highly technical units that must be capable of operating in all types of weather and terrain. Each MHD must be 100 percent mobile, with its own organic vehicle, in order to move easily throughout the area of operations. Unit personnel are armed with individual weapons to protect themselves and assist other units in self-defense.

The organic vehicle is a 1 1/4-ton high-mobility, multipurpose wheeled vehicle equipped with single channel ground-air radio and global positioning systems, and will in the future receive a portable command and computer terminal compatible with modern digital equipment. In addition to the nuclear, biological, and chemical (NBC) equipment that the unit carries, each MHD is authorized digital and 35-mm. still picture cameras with appropriate attachments. The MHD also is authorized computer equipment, including uninterruptible power source(s), surge protector(s), printer(s), scanner(s), and electronic data storage device(s); battery-powered audiocassette recorder(s); transcription machine(s); video camera(s); AC/DC generator(s); power transformer(s); map case(s); storage and shipping container(s); and hex tent(s) on its common tables of allowances. It is absolutely essential that the MHD's computer equipment be compatible with the supported unit's equipment.

Concept of Operations

CMH provides guidance on the type of historical material the MHDs should collect in the field. The unit historian will provide specific guidance regarding the type of material needed and the quality expected.

The MHD commander must expect to work without immediate supervision because of the geographical separation normally existing between the ACCH and deployed MHDs. The MHD commander thus has the responsibility for determining the number and type of projects needed to complete the mission.The MHD commander must also determine the amount and type of direct historical assistance that the MHD is able to give the supported unit.

The MHD must familiarize itself with the personnel, organization,activities, and records of the supported unit. It then plans appropriate projects to fulfill its mission. Within its geographic area of interest, the MHD is mobile and collects all relevant historical information. Continuous personal liaison with command elements keeps the MHD abreast of unit activities and allows it to provide historical advice and assistance. The MHD also works closely with unit adjutant general offices in the area of records management.

All material produced or collected by the MHD is forwarded to the controlling ACCH, and eventually to CMH for processing and evaluation. Continuous liaison among all three elements ensures the production of the most useful data on Army operations and activities.

SPECIAL HISTORICAL TEAMS/HISTORIANS DEPLOYED BY THE CENTER OF MILITARY HISTORY OR OTHER COMMANDS

Historical assets deployed into the ACC by CMH or other commands first should coordinate with the ACCH, to avoid duplication of effort and ensure that their operation is consistent with ACC objectives and guidance.

Army Artists

The Army Artist Program is sponsored by CMH, which establishes criteria and standards for artwork to be produced. CMH selects soldier-artists to participate in the program, provides logistical and transportation support to get the artists to the theater, monitors the program, and assumes custody of the finished artwork. Members and alternates for artist teams are selected by CMH from applications submitted by qualified military personnel, who are recommended and eligible for release to this special assignment.

Army artists may be attached singly or in groups to historians or MHDs for combat and contingency operations. The historian or MHD arranges billeting, transportation, clearances, local assignments, and other support required by the artists. The chief of public affairs and public affairs officers at commands and installations also support the Army Artist Program.

Historian Augmentees

CMH and other commands frequently deploy individuals or ad hoc teams of historians into the theater to gather specific information on certain topics. Some of these historians or teams may be civilian contractor personnel. These augmentees should coordinate with the ACCH in order to receive appropriate theater clearance and to ensure a unified historical effort.

Such augmentees deploy as individuals to a command. They may be soldiers from the active or reserve components, or they may be civilians. They may be part of a team that comes from any number of agencies or activities, and this team may not have worked together before. Frequently, the augmentees are present for only a small portion of the operation.

Historical Artifact Recovery Teams

CMH will assemble and deploy in a timely fashion military and/or civilian personnel (to include contractor personnel) for historical artifact recovery during combat operations and military operations other than war, including joint and multinational operations in which the Army is a part.

Personnel may be attached to an army headquarters, history teams, joint history teams, MHDs, logistical support groups, or other appropriate organizations.

The number and type of personnel required will vary depending on the size and scope of the operation. However, at a minimum, there will be a senior historical artifact coordinator at the theater staff level and one or more two-person recovery teams deployed throughout the area of operations.

Their mission will be to systematically collect, identify, register, and return to the United States significant historical artifacts relating to the U.S. Army, its allies, and its enemies. The recovery teams will provide a balanced and documented historical artifact collection for long-term preservation and for use in research and analysis.

The senior historical artifact coordinator will provide technical assistance and liaison with all parties in the theater, to include meeting the Army intelligence community's need to exploit the intelligence potential of historical artifacts. The coordinator will preselect significant historical artifacts for shipment back to the United States and attempt to prevent nonessential materiel from being returned at needless expense.

RELATED UNITS

Lessons Learned Teams

The Center for Army Lessons Learned (CALL) deploys teams to the theater to study specific actions.These elements provide subject-matter expertise and disseminate their findings to the entire Army as rapidly as possible. To the supported unit, these teams, other historians, and MHDs might seem to have an identical mission, because all are likely to be interviewing, collecting, and photographing the same subjects.

While their actual missions are quite different, historians, MHDs, and CALL teams should coordinate their activities to attain synergy. A lack of coordination will bring about resentment from the supported unit when the same commanders and soldiers are subjected to multiple interviews, the same documents are copied numerous times, and more visitors enter already busy operations centers.

Although CALL teams are the research elements with which most Army field historians and MHDs will coordinate on the battlefield, it will not be unusual to encounter researchers from other DOD and Army agencies and contract organizations.Examples are the Army Research Institute, the Center for Naval Analysis, and the RAND Corporation.

Public Affairs Detachments

Forward-deployed operational units will often employ mobile public affairs detachments (MPAD).Although substantially larger than MHDs,they operate in much the same manner. They provide the operational unit with on-the-ground public affairs support, which becomes increasingly important with each new technological innovation that allows the news media to provide better coverage of the battlefield.

The historians and MHDs should establish a close working relationship with unit public affairs offices and MPADs, which will be mutually beneficial to both functional areas.The historians will discover human-interest stories of public affairs value, while the public affairs offices will obtain material that will enhance the historical collection.

Various crises may occur in the combat theater where the historian will be unable to gain immediate access.The public affairs officer will have a quick reaction team specifically designated for such events. With proper coordination,the historian can become a part of this reaction team and not miss potential historical events.

Public affairs offices often use important military history dates for ceremonies and press releases because they are excellent opportunities for high-visibility, “good press” events. Examples of these events are Memorial Day services, organizational milestones, and commemorative anniversaries of particular battles. The historian will coordinate with public affairs offices as to when these important events will occur, provide short narrative accounts of the events, and outline what their relevancy is to the unit.

Combat Camera Teams

Combat camera teams are joint service elements that have the mission to photograph military operations. Historians and MHDs deployed to combat and contingency operations should coordinate with combat camera teams to ensure photographic documentation of historical events.

The products of combat camera teams do not go directly to the supported command or to the historian. The local commander does not “own” combat camera teams. Neither the local commander nor the historian has the authority to edit their material or to prevent its

transmission. The combat camera team's collection is for briefings at echelons above the field command. Unless historians work closely with combat camera teams and their headquarters, the historical community may never see the products the teams produce. Since their products are not normally accessioned into historical archives or repositories, historians and MHDs should attempt to secure copies of important historical photographs directly from the combat camera team.

Combat camera teams are entirely different from MHDs and public affairs detachments. They do not necessarily focus on the same subject matter as MHDs or MPADs, nor do they use the same techniques for photography and interviews. Due to the quality of their equipment,their photographic products are normally far superior for historical documentation purposes than those produced by MHDs or MPADs.

Combat camera teams bring into the combat theater the latest equipment available. They have the capability to transmit material directly via satellite. Service members in combat camera teams are prepared to do minor repairs on camera equipment. However, combat camera teams normally lack organic transportation and need local administrative and logistic support. It is obvious that historians,MHDs, and combat camera teams can assist each other in many ways in the theater of operations.

Chapter 4

Deploying the Force

TRAINING PRIOR TO M-DAY

Although it is essential that all deployable historians be proficient in the historical area, they must also have credibility as tactically and technically proficient soldiers.The chief of military history has stated that the most important qualification for a member of an MHD is not to be a historian, but rather a "first-class soldier."

Deployable historians, highly trained in both history and soldier skills, are key to the conduct of successful military history operations.The functions of the historian must be unobtrusive in the theater of operations,because the commander and staff must concern themselves with the close, deep, and rear battle.

The most valuable predeployment training will be conducted at the Combat Training Centers (CTC), where historians can work with units and individual soldiers who have experienced near-combat situations. Next in terms of training value is participation in a major exercise with a division or higher level unit. Although training conducted at CMH or at a major command headquarters may be useful,it is not as relevant as hands-on training at a CTC or during a major exercise with a unit the MHD might support during a war or contingency.

When a contingency operation begins, historical coverage is the responsibility of the historians of the deploying unit and the theater of operations.CMH will designate an ACCH for that theater. As necessary, MHDs will be deployed to augment the existing historical resources within that theater.

Historians must identify, procure, and package the equipment required for an on-call mission. Deploying individuals must identify the installation-specific preparation-for-overseas-movement requirements and formulate a plan for their accomplishment. Deploying individuals should refer to the Predeployment Checklist in *Appendix A*.

Automation Equipment

Historians should deploy with automation equipment and software that are compatible with the hardware and software of the deploying unit they will support. If time allows, the historian should coordinate with the G–6 or information management office of the unit to be supported. If time does not allow for such coordination, the historians should take the most modern equipment and latest versions of software available at the activity. If possible, automation equipment should be compatible with the Army's system for archiving historical documents and data.

Security Considerations

Deploying historians and MHDs need a security clearance and access level that will enable them to attend appropriate meetings and to have access to classified information within the supported unit. Upon arrival at the supported unit, the historian must see the G–2/security manager to ensure that all historical personnel are placed on the security ros-

ter. To perform the historical mission effectively, the historian's clearance level should equal that of the chief of staff and all coordinating staff officers. The minimum clearance required for any member of the historical team is that which will allow him/her full access to the headquarters of the being supported. All individuals serving in full-time historical positions should have courier orders.These are prepared by the parent command prior to deployment.

Load Plans

Historians and MHDs must follow normal military principles that result in successful deployments. One of the most important is to have a viable load plan for individual equipment, historical supplies, and, in the case of the MHDs, unit equipment.

Cross-loading is vitally important. All historical supplies needed to support a corps operation can be packed into one footlocker. This sets up a potentially disastrous situation if the container is lost. Cross-loading these supplies (film, forms, audiocassettes, computer disks, etc.) in different individual and unit baggage increases the probability that most of them will safely arrive in theater.

In-Transit Historical Collection Opportunities

Historians must be aware of opportunities for historical collection during the mobilization and deployment phases of an operation.These phases are often marked by long periods of waiting, during which the historian can interview other soldiers in the same status as well as those who are supporting the deployment.

Seeking opportunities in this manner will not only provide useful information on the deployment to future researchers, but will also hone the skills of the deploying historian. This necessitates that the historian hand-carries a camera and a tape recorder, along with film and audiocassette tapes.

Explaining the Mission

Operational commands do not always fully appreciate the benefits and value of taking historians with them during their operations. Ideally, historians or MHDs will have already coordinated and trained with the supported unit prior to deployment. However, historians often arrive late in the area of operations and are normally on their own to coordinate attachment to the supported unit.

All historians,from junior soldiers in MHDs to senior officers serving as an ACCH, must be able to explain their purpose and value to the supported unit and their relationship to other "collectors" such as the Center for Army Lessons Learned, public affairs detachments, and combat camera teams.

The best method is for the historian or the MHD to have a briefing prepared,targeted for the commander or chief of staff, which covers the entire scope of the historian's duties. Ideally, this will result in the supported unit's incorporation of a historical annex into its plans,if the briefing has been presented before the operation. If not, then it can be used as an introduction of the historian or the MHD to the supported unit.This briefing may also be used to orient new leaders and soldiers as well as visitors on the missions and purposes of the historical program.

Chapter 5

Military History Operations Products

HISTORICAL PROGRAMS

The purpose of the AHP is to use history effectively to serve the Army and the nation. The Army Historical Program preserves, critically interprets, disseminates, and teaches military history. It provides historical advice and stimulates historical consciousness within the Army and throughout the nation.

As discussed in previous chapters, all levels of command have historical programs. At the operational and tactical levels, the historical program is set forth in a standard operating procedure (see *Appendix C*).

A critical part of executing a historical program throughout a command is conducting staff assistance visits at subordinate units. Within the historical program the purpose of staff assistance visits is to offer advice and to collect historical information.The unit being visited must know that the historian or MHD is coming, and must approve the visit in advance.The unit historical officer is the point of contact.If the subordinate unit does not have a specifically identified historical officer, the historian must ensure that proper coordination has been made with the chief of staff or executive officer. The liaison officer system can be helpful in coordinating staff assistance visits to subordinate units.

Historian's Notes

The historian's impressions are primary, for-the-record source documents. In most commander's or staff meetings, no one individual takes minutes of the entire meeting. If the historian attends such a meeting, he/she must record not only what was said, but also how and why the decisions were reached.These notes will serve as background information for the historian's analysis of the unit's subsequent operations.

The level at which the historian is allowed to attend important meetings and to take notes will depend upon the tactical situation and the attitude of the commander. The historian must cultivate a level of trust with the commander and the staff so that they will consider him/her a part of the team and allow the taking of extensive notes.In this manner, the historian may obtain material not otherwise recorded. Military historians should:

- Take detailed notes on what was said during meetings, particularly on comments made during decision briefings.
- Note other factors that influenced the outcome of an operation.
- Survey the terrain of an operation.
- Record weather conditions before and during an operation.

Interviews

To effectively perform his/her duties, the historian must conduct oral history interviews. Oral history activities are an integral part of the AHP. They focus on persons, events, and topics of historical interest to the Army. They are conducted to obtain historical information that may not otherwise be recorded. They can link together in a meaningful way

seemingly disparate information in the documents. Oral history materials are compiled primarily for use within the Army and are considered official Army records.

CMH provides oversight, policy, and guidance for oral history. It determines specific standards for oral history programs and materials.CMH ensures that oral history materials are preserved and that selected products are distributed commensurate with mission requirements. CMH,MHI, MACOMs,and other Army agencies and commands publish selected interviews in oral history monographs. CMH and MHI attempt to catalog all known Army interviews, and they maintain copies of all interview transcripts that are forwarded to them.

CMH specifically directs the collection and disposition of wartime, contingency, and field operational interviews. CMH will establish a uniform cataloging system at the start of each war or contingency. Field historians and MHDs must use this cataloging system.

In order to adhere to National Archives and Records Administration guidelines, all Army interviews must be recorded on standard (not micro) audiocassettes. The 90-minute cassette tape is the current CMH standard and is encouraged for field use. Videotaping an interview is very useful if there are two or more subjects.

Historians must be careful not to promise what they cannot deliver. This includes copies of transcripts, inclusion in the official history, interviewee control of disposition of the interview, and similar items beyond the historians' control.

There are two methods of providing complete oral history coverage of a unit. One is the top-down sequence. The historian begins by interviewing the commander to get an overview. This ensures that the key interview is completed in case circumstances preclude interviewing all of the subjects the historian should interview. The historian should then begin working through the staff, beginning with the XO and S–3 or support, plans, and operations officer. A second approach is to interview key staff members first in order to be more knowledgeable about the unit and its operations before conducting the commander's interview. After interviewing the unit staff, including enlisted assistants, the historian should move on to the major subordinate elements down to the company and platoon levels.

The historian should interview junior soldiers in order to get their perspective on the operation.This is an excellent assignment for the enlisted soldiers in the MHDs,because they should be able to establish good rapport with the junior soldiers.

The historian should conduct the interviews as soon as possible after the operation,but not before the soldiers have had the opportunity to rest and clean up. During the Korean War, historians determined that it was best to conduct interviews after soldiers had a hot meal. However, details begin to fade after twenty-four hours. If enough time goes by, a unit begins to create its own mythology and will unknowingly report that mythology as fact.

Following the interview, the oral history is transcribed, either at the interviewer's level, at higher headquarters, or at CMH.The interview tapes and the transcript must be marked and shipped in the manner required by their classification level. When transcription occurs at the tactical level, the historian maintains original tapes and transcripts, and forwards copies to the following locations:

- Center of Military History
  ATTN: DAMH-HDO
  103 Third Avenue
  Fort McNair, DC 20319–5058

- U.S. Army Military History Institute
  ATTN: Educational Services Division
  Carlisle Barracks, PA 17013–5008

Historians conducting oral history programs use several types of interviews. These include exit, subject, after-action, and biographical interviews. All but the biographical interviews are frequently accomplished before, during, and after combat and contingency operations.

The exit interview, conducted near the end of a person's tour of duty, centers on the experiences of a commander, staff officer, or other key individual in a particular assignment. The historian may conduct exit interviews as part of the End-of-Tour Interview Program, which is a specific program for which the chief of military history is the executive agent. This program normally requires end-of-tour interviews with MACOM, corps, and division commanders. Commanders of logistic and support commands should be interviewed during combat and contingency operations.

The subject interview concentrates on a single event, such as an operation,or focuses on a specific topic, such as the development of a particular weapons system or the formulation of a specific policy, strategy, or program. For example, CMH or a branch school historian may request that interviews be conducted on a single subject or event.

Historians or MHDs normally conduct after-action interviews or combat after-action interviews to cover wartime, stability and support operations, and military exercises.This is an important part of the historical mission to collect and preserve historical documentation on U.S. Army operations. The historian should conduct the after-action interview as soon as possible following the event.

The biographical interview normally covers the career of an individual.Deployed historians or MHDs would not normally conduct biographical interviews, which are normally conducted by staff historians or by War College students.MHI manages these interviews through two programs: the Division Command Lessons Learned and the Senior Officers Oral History Programs.

Graphic Materials

Graphic materials include photographs, maps, organization and flow charts, sketches, and briefing charts or slides. Some maps contain information not available on standard maps. Especially useful sources of information may be special reports, such as studies of river crossings prepared by engineer headquarters. Military historians ensure, through regular liaison and constant search, that these projects and graphic materials are forwarded to the proper headquarters.

Army Art

CMH may create Army art teams or select individuals and deploy them to the combat theater or supporting commands. These teams or individuals will normally work for the ACCH and be supported by historians and MHDs throughout the theater.

The artists deployed to the combat theater will usually have only their individual equipment and basic art supplies. The ACCH or other historians must coordinate transportation and logistical resupply for these artists. The unique items used by the artists may require support from outside the theater. If personnel are used in secure support areas, the logistical requirements may be easier to support from the local economy.

If CMH does not provide artists, the historian should consider identifying soldiers with an art background for temporary or full-time use as Army artists. Soldiers with the 25S MOS (Illustrator) are prime candidates. The historian must also be attuned to soldiers who are producing artwork on their own, who might be willing to donate their products to the Army Art Collection.These "trench art" artists produced some of the best examples of combat art.

Photographic Documentation

Photography is an important tool for collecting the historical record of wars and contingencies. It is used for recording the different aspects of war, from dramatic frontline conflicts to the seemingly pedestrian, day-to-day life of the soldier behind the lines. Photographs show the reality of war with an immediacy that other mediums cannot easily replicate.

Historians and MHDs do not have primary responsibility for taking photographs of Army operations, but they should do so when the opportunity presents itself. They should certainly be taking photographs of behind-the-lines subjects, where they will be operating. combat camera teams and public affairs photographers have the primary mission of taking photographs. Historians and MHDs should coordinate with and support these teams as they accomplish the historic photography mission.

The historian should collect a copy of all historic photographs. If possible, the original negative, or a copy, should also be retained. Periodically, these photographs should be indexed and forwarded through the history technical channel to the ACCH.

Photographs should include images of commanders and key staff members, terrain, facilities, specially modified equipment, and locations of significant combat actions. The historian uses photographs to amplify narrative reports. If security conditions permit, a photographer should photograph the situation map, intel map, planning map, and status charts used in the headquarters on a periodic basis. The historian must make every effort to ensure that the photographic record is complete and includes common and atypical operations,equipment, clothing, and terrain.Composite photographs prepared especially for an operation are helpful. Terrain changes over time and places where significant actions occurred should be photographed as soon as possible.

Complete captioning data should be placed on the rear of all photographs. Captioning is very difficult to do in the field.A photographer rapidly loses track of the multitude of pictures taken.A written log is always best,but it is cumbersome.A technique is for the photographer to carry a cassette recorder and dictate which roll is being shot and what is on it. Other photographers take short notes on a pocket-sized notepad. Regardless of the method chosen, the photographer should transcribe the tape or notepad information onto the official photography log at the end of each day.

If historians have any doubt about captions for specific photographs, they should draw from knowledgeable sources on the staff. This also educates staff members about what the historian is doing and can improve cooperation from them. Upon arrival in the area of operations, the historian should coordinate with the local Public Affairs Office, Military Intelligence, and Signal Corps photographic personnel to gain technical support and to obtain access to their photographic products.

If classified information or a classified subject is contained in the photographs, the exposed film, developed negatives, and any prints will bear appropriate markings and will be handled accordingly.

The historian should constantly search for unofficial photographs of potential historical value. In most cases,these photographs will be taken by individual soldiers using their own personal cameras. Often, these will not be available until after the deployment.

The historian should not take photographs that are designed solely for shock effect or for a use detrimental to the friendly effort. All historic photographs are taken exclusively for historical purposes. The Army has other agencies designated for frontline photography. Public affairs units and civilian photographers in press pools will take pictures for immediate release.

Journals and Journal Files

Historians and MHDs should advise on the preparation and retention of journals and journal files. Journals are the most important organizational records of an operational or historical nature. AR 220–15, *Staff Journal Records and Files*, lists the units that prepare journals and journal files and provides instructions on their form and content. Files maintenance and disposition instructions are in AR 340–18–1 and AR 340–18–2.

DA Form 1594 is the primary journal form. Frequently, soldiers are introduced to this form as the "charge-of quarters (CQ) log" or "staff duty officer (SDO) log" during their initial entry training. A journal is the official, chronological record of events encountered by the unit or staff section. The amount of detail recorded in the journal varies according to the extent of command emphasis, the experience of available personnel,and the type of operations being carried out. Entries should be made as events occur.

Events should be described accurately, since a journal entry cannot be altered except to correct typographical or similar errors. The officer who keeps the journal will initial all corrections.If an entry is incorrect,confusing, or incomplete, a correction or addition in a later entry may be made with a cross-reference to the original entry.

Following is a list of the types of entries or incidents that should appear in journals:

- Time of receipt or transmission of important messages, orders, and reports
- Visits of higher headquarters commanders and staff officers and actions taken because of their visits
- Absence of commanders or section chiefs from the command post, their destination, time of departure, and time of return
- Conferences
- Start and finish of troop movements and the attachment and detachment of units
- Military operations or training exercises
- A brief synopsis of written messages or orders, with file copies of the originals included in the journal file.It is especially important that verbal messages or orders be entered in full.

The staff does not normally enter routine matters into the journal. It may be occasionally necessary to record items that seem unimportant but are basic to the planning and preparation of future operations. Individuals should not record meaningless entries or statements such as, "Normal routine activities were conducted."

Journal files are the supporting documents for the journal. The journal files should have the same dimensions as,and be bound with,the journal. Large documents should be folded, and small documents should be secured to blank pages that are the same size as the journal pages. These documents should be annotated with date-time groups that corre-

spond with the journal entries they support. An operations order is an example of a supporting document that should go into the journal file.

A staff assistant or an experienced operations clerk normally maintains the journal in organizations that have staff sections. The operations sergeant maintains the journal in a tactical unit.The adjutant or executive officer is normally responsible for unit journals.

At the close of each day's operation, the operations officer must read the journal and prepare the daily summary as the final entry. If the historian is carefully monitoring the unit's activities, the daily entry in the historical chronology will often mirror the daily summary of the journal.

COMMAND REPORT

The current AR 870–5 requires brigades, regiments, and larger units authorized by MTOE and provisional orders to submit reports of operations involving combat.These are called command reports.Command reports are normally researched and written by a unit historian. It is expected that, in the future, units that have historical officers will be required to submit operations data reports (*see below*) in lieu of command reports.

The frequency of reports is normally every six months or the duration of assigned operations. This duration will be announced by CMH, which will task units and agencies to provide command reports, operations data reports, or feeder reports for higher headquarters' command reports.

The command report provides a timely, thorough, and accurate record of significant combat and contingency operations. It consists of historical information, brief analysis, and insights into specific operations. In combat and contingency operations,the preparation of a command report eliminates the requirement to prepare an annual history or annual historical summary for the same time period.

In combat and contingency operations, the chief of military history initiates procedures and requirements for command reports in coordination with the Army chief of staff, the deputy chief of staff for operations and plans, the senior Army commander, and with the theater, task force, or MACOM headquarters involved. On mobilization or notification of an emergency or contingency situation, Army commanders of contingency forces prepare the command report in accordance with the format, guidance, distribution, and standards directed by the chief of military history. Command reports are a command responsibility and may be prepared down to brigade/regiment/group level. Commanders must ensure that the historical records and source materials used in preparing the command report, including journals and journal files,are retired in accordance with appropriate regulations.

The command report is a summary of the operational highlights and activities of a unit for a specific reporting period. Although the historian will research and write the report, it should be emphasized that it is the unit commander's report,wherein the commander evaluates the activities of his unit.A command report offers an explanation of what was done, how it was done, why it was done, and what the significance of these actions was. The commander comments on inadequacies and successful use of doctrine, tactics, equipment, and special techniques. *Appendix D* contains an example of the format for this report.

The command report explains difficulties encountered and how the unit met them, as well as information that was available and used by the commander in making plans. Other areas covered are cases of improvisation on techniques or equipment to meet local needs; the commander's plans, including those rejected; and reasons for selection or rejection. The

command report also gives details of the enemy situation and all significant changes in it, and the effect of terrain and weather on plans and operations.

Additionally, the command report discusses organizational and training activities for a designated reporting period. It includes information about unit strength, morale, discipline, administrative policies and practices, training methods and problems, and relations with other commanders.

Commanders engaged in operations must collect, maintain, and retire historical records and source material. The historian or historical officers are the key staff members who oversee the accomplishment of these tasks. They will use these records and material to prepare a command report covering the operations. This report is narrative and covers specific operations or activities as directed by the theater commander and the ACCH in coordination with the chief of military history.

The command report includes annexes containing orders, journals, unit reports, and statistical tables that explain and document the actions recorded. The historian or historical officer ensures that relevant supporting documents are part of the command report. He/she also checks the documents and annexes for clarity, completeness, and accuracy.

The following types of supporting documents and information may be required for the command report. Lower echelons will be concerned with only a small part of the list. The following list is not all-inclusive, and different headquarters may assign different names to similar documents:

- Staff section and unit reports
- Unit and staff section journals
- Message files and telephone journals
- Situation maps
- Military orders
- Copies of activation, attachment, detachment, reorganization, redesignation, or inactivation orders
- Station lists and directories, with code names
- Rosters of officers, with duties and dates of command
- Strength reports and casualty statistics (killed in action, wounded in action, and missing in action from all assigned units by type, name, place, and date)
- Awards and decorations statistics for individuals and units
- Extracts of enemy documents, with translations
- Copies of important prisoner-of-war interrogation reports
- Plans, staff studies, and estimates, including those considered but not used and the reasons therefore
- Letters of instruction
- Operations instructions and memorandums
- Troop lists showing higher and lower attachments, with dates of attachments and detachments
- Situation reports and summaries
- Training memorandums
- Standard operating procedures
- Administrative orders, with overlays and annexes

- Copies of special reports required by higher authority that record performance of materiel, combat experience, special operations, or personnel losses in specific actions
- Signal operating instructions
- Ammunition reports, including expenditure statistics and materiel losses
- Strength reports, including statistics of attached units and replacement statistics
- Air support plans and reports
- Pertinent interviews with key personnel
- Selected items of the most significant correspondence
- Sketch drawings, overlays, photographs, tables, graphs, charts, memorandums, and reports that clarify operations and activities

Historians must familiarize themselves as early as possible with the kinds and titles of military reports and records prepared in their units. They should know who prepares them, what information they include, and how they are distributed.

With the help of the appropriate staff officers, the historian can set up historical files for important papers that are not kept in the journal file. The historian may include such papers as an annex to staff section reports after their original purpose has been fulfilled. The historian or historical officer must advise and assist staff members charged with keeping daily journals and other records.The historian should also suggest the kinds of information that will increase the historical value of unit records, aid in the standardization of documents,and make officers and units aware of the importance of recording events accurately.

The historian secures additional information for the command report by interviewing commanders, staff officers, and enlisted soldiers familiar with problems, decisions, and actions involved.This is particularly important in areas where documents may not be available.

Combat after-action interviews supplement accounts of significant actions by small units for which documentary evidence may be fragmentary or lacking. Exit interviews record the experiences of key commanders and staff officers before they leave their particular assignments. Other interviews, appended to historical studies, aid in examining particular technical or tactical problems.

Interviews are also of great value in supplementing the record of command and staff decisions. Commanders and officers can discuss calculations,assumptions, and estimates on decisions they made. Interviews often explain problems and ideas of commanders and staffs that formal records cannot supply. Interviewing techniques are outlined in *Appendix B.*

OPERATIONS DATA REPORTS

ODRs are annotated chronologies of the unit's operations that will be fully supported by an indexed set of key historical documents. Unit historical officers will compile ODRs in lieu of command reports.

ODRs are similar to, but distinct from, unit journals. The key difference is that in the ODR the historical officer will include, along with all key historical documents, any important analytical or summary data charts and briefing charts that are produced by the

unit; some attempt will also be made to make the chronology entries a cohesive, complete account of the unit's operations.

CMH and the ACCH will instruct unit historical officers when these reports are to be accomplished and what time period they will encompass.One copy set will be made a part of the unit's historical file, while a second copy set will be forwarded to CMH.The ACCH and other historians in the unit's chain of command may request copy sets of the ODR.

HISTORICAL MONOGRAPHS

A historical monograph is a detailed, thoroughly documented, written work that exhaustively covers a small area of history. An Army historical monograph is an in-depth, systematically presented historical work that focuses on a single subject. CMH writes and publishes monographs for Army-wide distribution. CMH also may offer to co-imprint a monograph with a MACOM. Other historical monographs may be produced by the MACOM/theater military history office for limited distribution. Lower echelon units desiring to produce a historical monograph should coordinate with the MACOM historian or the ACCH.

The MACOM historian or the ACCH submits a proposed concept for monographs to CMH as part of the Historical Projects Development Process. If approved by CMH, the monograph becomes part of the annual AHP list of publications. On other occasions, the chief of military history may assign monographs to the MACOM historian or the ACCH.

Army historical monographs do not have a required format,but they will normally include a title page, foreword, table of contents, necessary chapters, footnotes or endnotes, and appendixes, to include a glossary. CMH should be consulted on style.

ANNUAL HISTORY

The annual history is a written account of the operations and activities of an Army organization. Field historians and MHDs would not normally write an annual history during a war or contingency. However, it is possible that a situation would arise where they would be required to research and write an annual history for the supported unit, and the following information is provided for that situation.

An annual history is an objective record of the unit's performance for the previous year and serves as its institutional memory and guide for future operations. The commander uses the command's annual history to add historical perspective to the decision-making process. It is a primary source of background facts in support of the staff and is used to orient new commanders and personnel on the organization's mission, recent activities, accomplishments, and issues.

There are two types of annual history: the annual command history and the annual historical summary.

The annual command history is a narrative account of the historically significant developments and events that took place in the command during the previous year. It contains analyses of the topics included and is prepared by a full-time professional historian assigned to the command.

The annual historical summary is a descriptive record of the historically significant developments and events that took place within the command during the previous year. It does not normally contain analyses of the topics included and is prepared by a unit historical

officer as an additional duty in organizations that do not have an assigned professional historian. Some units require feeder reports from subordinate elements in order to complete the annual historical summary.

AR 870–5 outlines content and reporting requirements for annual histories. *Appendix E* contains a recommended format for annual histories.

UNIT HISTORY

The historian and unit historical officer must be intimately familiar with the lineage and honors of the unit.The commander will often make use of past examples of unit accomplishments to motivate soldiers.The historian must be able to provide this information to the commander.

The historian or historical officer is the unit's subject-matter expert on its history. In units that have a well-functioning history program, the historian prepares a briefing for newly arriving unit members.This is especially important in a combat environment,where esprit de corps is a combat multiplier.

In long-term deployments,commanders of MTOE organizations authorized an organizational color, distinguishing flag, or guidon (except organic elements of color-bearing organizations) should attempt to observe their unit's organization day. It should be the date of a significant event in the history of the organization. Most units already have this day established prior to deployment.

If the operational tempo allows, a unit should observe its organization day and commemorate its history in ceremonies that stress unit lineage, honors, and traditions, as well as personal accomplishments of former and current unit members.Even task forces that have been together for extended periods of time should select and observe a unit day. The unit day may include morale-building events, such as sports competitions.

Unofficial Unit Histories

Commanders of MTOE organizations authorized an organizational color, distinguishing flag, or guidon should prepare informal, easy-to-read unit histories and keep them up to date with periodic supplements or annual histories.The unit history should reflect the official lineage and honors determined by CMH.It should be a narrative account of the developments and events of importance to the unit and to the U.S. Army. Sources should be identified, and key documents should be appended to supplement the text.

A pamphlet entitled "Organizational History" is available upon request from CMH.This publication provides detailed guidance on preparing a unit history. It includes instructions on researching the unit's retired records.

U.S. Army organizations have available to them a variety of official historical publications that may be useful in the preparation of a unit history. These include books, monographs, and reports on general U.S. Army history and on specific periods, areas, and subjects. These publications provide the context into which a particular unit's history can be placed.

Publication of unit histories by a U.S. Army organization may be financed by nonappropriated funds under AR 215–1, if a personal copy is furnished to all unit members. The MACOM commanders may authorize appropriated funds for the publication of unit histories when reference copies are needed by staff elements within the headquarters, subordinate elements,or higher headquarters to conduct official business.Copies of the unit history should be forwarded to CMH and MHI.

Special Designations

The purpose of special designations is to enhance the morale and esprit of an organization by directly associating it with some person, place, thing, event, or function having particular significance to the unit (see AR 870–5).

The two types of special designations are a traditional designation—one used by an organization continuously for the last 30 years or more, and a distinctive designation—one used by an organization for less than 30 years or one with which an organization wishes to be associated.

Units must make a formal request to CMH to adopt a special designation.The designation will appear in parentheses following the official designation,except on colors, flags,or guidons. Requests for traditional designations should also be accompanied by the necessary supporting evidence, such as newspaper clippings, unit letterhead, and so forth.

Only one special designation will be approved for any color-bearing, flag-bearing, or separate guidon-bearing organization. Once a special designation has been approved for an organization,no other organization may be authorized use of the same designation, unless it submits valid evidence of having used that special designation continuously for the last thirty years or more.

An organic element of a color-bearing organization that submits valid evidence of having used a special designation continuously for the last fifty years or more will be authorized a traditional designation without regard to any special designation approved for its parent organization.

Chapter 6

Military Operations Other Than War (MOOTW)

CONTINGENCY OPERATIONS

A contingency operation, as defined by JCS Publication 1–02, is an emergency involving military forces caused by natural disasters, terrorists, subversives, or by required military operations. Due to the uncertainty of the situation, contingencies require plans, rapid response, and special procedures to ensure the safety and readiness of personnel, installations,and equipment.Contingency operations involving combat forces may occur as a part of, or subsequent to, low intensity conflicts when diplomatic and political efforts fail.

Historical requirements should be included in contingency operations plans. When preparing plan annexes or SOPs for contingency operations, historians must be aware of all factors that can affect military history operations before, during, and after the contingency.

Contingency operations are often based on international treaties, which may restrict historical collection activities. In contingency areas, Status of Forces Agreements seldom exist,but the historian should be familiar with all the restrictions on correspondence, information clearance procedures, visa and credential requirements, and photography of host-nation military installations. What might be a perfectly legal collection of historical artifacts and war trophies in wartime may be considered theft in contingency operations, depending on the treaty.

The host nation may have laws or policies that restrict information based on cultural,political, or religious sensitivities.These sensitivities may affect the conduct of military history operations.

Forces deployed on short-notice contingency operations may have to rely on host-nation support for equipment or supplies. Most likely, such support will be limited. Of particular interest to historians and MHD commanders is local photograph development capabilities and commercial availability of supplies, which may not arrive through Army supply channels in a timely fashion.

PEACEKEEPING

Peacekeeping operations consist of the employment of military forces in support of diplomatic efforts to restore or maintain peace in areas of potential or actual conflict. Peacekeeping operations may position units in hostile environments.

When deployed as part of a peacekeeping force, the historian should develop relationships with host-nation historians and historians from the contingents of other involved nations.

"COUNTER" MISSIONS

Historians or MHDs may be deployed or provide historical coverage when their commands assume roles in counterinsurgency, counterterrorism, and counterdrug operations. This is an area where Army historians and MHDs will have to work closely with the Joint History Office and other service field historians and historical teams.

Although it is often difficult to collect documents and conduct research on these operations,they are becoming increasingly important and frequent military missions.It is essential that this part of the U.S. Army's history receive historical coverage.

NATURAL DISASTERS

Although historians and MHDs do not normally provide historical coverage of military support during natural disasters, they have been used on occasion during such major natural disasters as Hurricane Andrew. In this situation they were part of the JTF headquarters.

SPECIAL EVENT SUPPORT

MHDs and historians may be required to provide historical coverage of military support for major special events such as the Olympics or a presidential inauguration. Historical monographs written about these events have been extremely useful the next time military units had to provide military assistance for such an event.

Chapter 7

Military History Planning

GENERAL

Military history is a long-term and subtle, but extremely important, combat multiplier. Military historians, through their historical programs, contribute to operations while recording data for American society to foster public support for the military. Provisions for military history operations must be included in campaign and contingency plans to ensure that the historical record is accurately and completely compiled.This historical collection effort will meet the immediate and future information needs of soldiers and the public.

Planning for historical involvement in military operations is the responsibility of CMH, the ACCH, unit historians, and unit historical officers. It is incumbent upon historians at all echelons to plan for the conduct of military history operations across the operational continuum from peacetime contingency operations through a major war.

Army historical collection in joint operations extends from the unified command level to the individual fighting position. Army historians and MHDs may be called upon to augment joint historical efforts, either as members of unified command historical offices or as part of a JTF historical staff. Augmenting Army historians and MHDs will be collecting historical data at the joint level and may not necessarily be involved directly in the historical coverage of the Army's portion of the operations. Army historians and MHDs working directly for the Army component and its subordinate units will be responsible for providing historical coverage of their portion of the joint operations.

Military history operations must be planned for, regardless of the level of involvement. Military historians cannot assume that they will be deployed, that they will be adequately supported, or that they will be provided the necessary augmentation to accomplish the mission. Military history plans, coordinated and annexed to organizational operations plans (OPLAN), are the tools that make it happen.

THE JOINT PLANNING PROCESS: AN OVERVIEW

Attaining military objectives in support of national security strategy is the goal of the Joint Planning Process. Similarly, identification and attainment of historical objectives in support of the commander's mission is the goal of historical planning at all levels.Military history plans must be integrated into plans developed by the joint planning process.

The joint planning process is a coordinated joint staff procedure used by a commander to determine the best method of accomplishing assigned tasks and to direct the actions necessary to accomplish the mission. While this joint planning normally occurs at echelons above corps, all historians must be familiar with the process.

The planning process applies to all operations across the operational continuum. It begins when a requirement is identified and continues until the requirement no longer exists or the plan is executed.

Joint operational planning is performed in accordance with the Joint Operational Planning and Execution System (JOPES). This is the principal system within the Department of

Defense for translating policy decisions into OPLANs. The JOPES process is being amended to include provisions for historians in joint operations.

At the joint command level, historians receive planning guidance from their commanders and the Joint History Office. On the basis of this guidance, the historian develops and coordinates operations plans.

Plans are prepared in prescribed formats in either complete format (OPLAN) or in a concept plan (CONPLAN) format.

An OPLAN is a complete, detailed plan.It includes a complete description of the concept of the operation and all applicable annexes.It identifies resources,specific forces,and functional support. The historical annex to an OPLAN is assigned a letter designation based on the sequence in which historical material is mentioned in the basic order or plan. When executed, the OPLAN converts quickly into an operations order (OPORD).

A CONPLAN is an abbreviated operations plan. A CONPLAN requires considerable expansion or alteration to convert it into an OPLAN or OPORD. Detailed support requirements are not included.The commander determines what annexes will be included to complete the CONPLAN.

JOPES provides for two planning processes to formulate a selected course of action: Deliberate Planning and Crisis Action Planning (CAP).

DELIBERATE PLANNING

Joint planners use the deliberate planning process during peacetime when time is not a critical element to the planning process. Deliberate plans are analyzed in detail and coordinated. They develop courses of action based on a hypothetical or potential crisis using available intelligence and rely heavily on assumptions regarding the political and military circumstances that will exist when the plans are implemented.

There are five phases in the deliberate planning process:

- Initiation
- Concept Development
- Plan Development
- Plan Review
- Supporting Plans

During concept development (Phase II),the historian assists the staff in developing a concept of operations. The historian analyzes the mission and planning guidance and develops the historical portion of the staff estimate.

In plan development (Phase III),the historian writes the Historical Annex to the OPLAN or CONPLAN.The historian identifies and resolves shortfalls by early coordination with the Department of Defense component and supporting commanders. The historian also coordinates plans with functions having an impact on the historical missions, e.g. psychological operations, civil affairs, public affairs, combat camera, etc. Historical unit augmentation and other functional support requirements are also included.

During Phase III, the historian identifies historical assets and units for inclusion in the Time-Phased Force and Deployment Data (TPFDD), a data base portion of the plan. It includes in-place units, units to be deployed in support of the plan, the desired sequence for movement to the port of embarkation, and other logistics-related data.

CRISIS ACTION PLANNING

CAP procedures provide the means to respond to any crisis or incident in time-sensitive situations. It provides for the transition from peacetime operations to war. CAP is more responsive and flexible than deliberate planning. Formal CAP procedures are used to adjust and implement previously prepared plans. Deliberate plans, for example, are adjusted to suit the actual crisis situation. CAP also develops and executes OPORDs where no relevant plan exists for an evolving crisis.

Crisis action planning is accomplished in six phases:

- Situation Development
- Crisis Assessment
- Course of Action (COA) Development
- Course of Action Selection
- Execution Planning
- Execution

During the COA development phase, the chairman of the JCS issues a Warning Order or other directive tasking the appropriate commander to develop military options to a crisis. The ACCH and other Army historians should be responsive to any guidance issued by the Joint History Office, the unified command historian, and CMH.

Supported commanders develop, analyze, and recommend possible courses of action to the National Command Authority (NCA).The NCA then selects a COA and directs execution planning to begin.A CJCS Alert Order is issued,which directs the selected COA into an OPORD.

During the execution planning phase, deployment, transportation, and logistics requirements and schedules are determined. The supported command's historian provides guidance about the operation. In instances where a crisis does not progress to implementation, the CJCS will issue appropriate guidance regarding continued planning requirements.

Detailed historical planning must occur during the deliberate planning phase. Historians at all echelons within a joint command must coordinate relationships as well as support and augmentation requirements. The historians must insert those requirements into appropriate plans and annexes.

Historians at all echelons develop and write historical annexes to unit OPLANs. These annexes should be written in concert with already established SOPs and other plans that have been coordinated and rehearsed by the historical staff with the units.

Once written, the historical annex is coordinated with other agencies and staff sections. The historian should include all support and augmentation requirements in the annex.The historian's plans and requirements must be coordinated through operations channels. Theater commanders prioritize their support requirements through operational channels. Therefore, historians must work closely with operations and planning staffs to ensure proper historical support.Historians should ensure augmenting MHDs are included in the TPFDD and that the appropriate priority is placed on the deployment of historical assets relative to the mission.

Historians may not always be required to write a historical annex, but should be familiar with all OPLANS of the command. MHD commanders should coordinate support requirements with supported commands prior to deployment or mobilization. More detailed information on joint planning can be found in the doctrinal manuals for planning joint operations.

Appendix A

Predeployment Checklist

[ ] Ensure unit soldiers have valid will and powers of attorney.

[ ] Update and screen medical, shot, and dental records.

[ ] Ensure each soldier has panoramic dental x-ray and current HIV test.

[ ] Ensure each soldier has valid ID tags and ID card.

[ ] Ensure vehicle drivers have valid military driver's licenses.

[ ] Update list of unit points of contact (POC) and telephone numbers.

[ ] Verify validity of security clearances.

[ ] Oversee publication of unit orders.

[ ] Validate courier orders.

[ ] Update DD Form 173, Emergency Data Card.

[ ] Check validity of passports, if applicable.

[ ] Assemble 30 days of supply for expendables.

— 100 audiocassettes

— 15 rolls of 36-exposure film

— 50 batteries for tape recorders

— 5 batteries for camera

[ ] Review and update historical annex to contingency operations plan.

[ ] Obtain applicable published guidance from CMH,theater command,and supported unit.

[ ] Inventory TOE equipment to ensure 100 percent serviceability and accountability.

[ ] Ensure non-TOE equipment is listed on interim authorization documents.

[ ] Figure total weight and cubic measurements for equipment before moving to embarkation point.

[ ] Prepare operations order for your MHD.

[ ] Contact the unit(s) you will be supporting to determine any special requirements.

[ ] Determine special equipment considerations (based on climactic conditions).

[ ] Determine how products will be returned to ACCH or CMH.

[ ] Coordinate with ACCH to determine availability of communications assets.

[ ] Obtain directories of supported units.

[ ] Establish POCs in deploying units for historical matters.

[ ] Develop equipment repair and procurement plan for MHD equipment.

[ ] Determine augmentation needs for forward-deployed historical offices.

[ ] Prepare sensitive items list for protective masks, weapons, night vision gear, etc.

[ ] Obtain maps of deployment area.

[ ] Conduct background research on the region, conflict, proposed contingency operation.

Appendix B

Historical Interview Checklist

AR 870–5 requires that an access release form be executed for interviews during peacetime.The Judge Advocate General ruling at DA level was that if the interviewer and interviewee are members of DOD and the interview is part of official business, the interview is in the public domain. Still, any historian should execute this access agreement whenever practicable.

MEMORANDUM FOR (title of agency head)

SUBJECT: Access to Oral History Materials

1. I, _____, participated in an oral history conducted by _____ of the _____ on the following date(s): _____.

2. I understand that the tape(s) and the transcript resulting from this oral history will belong to the U.S. government to be used in any manner deemed in the best interests of the U.S. Army, as determined by the chief of military history or his representative.

3. I hereby expressly and voluntarily relinquish all rights and interests in the tape(s) and transcript to the U.S. Army with only the following caveat: (please initial one)

_____ none

_____ (other) _____

4. I understand that the tapes and transcripts resulting from this oral history may be subject to the Freedom of Information Act and,therefore, may be releasable to the public contrary to my wishes. I further understand that, within the limits of the law, the (name of agency) will attempt to honor the restrictions I have requested to be placed on these materials.

_____ _____

(Name of Interviewee) (Date)

Accepted on behalf
of the U.S. Army by _____ _____

POST-INTERVIEW TASKS

[ ] As the last question, ask "Is there any additional information you would like to add?"

[ ] End with "Thank you. This concludes the interview."

[ ] Punch out the tabs so that the tape cannot be inadvertently erased.

[ ] Mark the tape and box according to standard.

[ ] Number the tapes according to the plan CMH provides. Serial numbering of the tapes is critical for subsequent cataloging of the interview tapes and transcripts. Historians and MHDs must use the CMH numbering plan.In the absence of any more specific guidance, the numbering system works as follows:

Conflict/Operation Abbreviation + IT (Interview Tape)—Element—Number

Examples:

The first interview conducted by the 28th MHD about the Vietnam War would be:

VNIT–28–001

The fifteenth interview conducted by the ACCH in a contingency called Operation GOLDEN APPLE would be:

GAIT–ACCH–015.

[ ] Prepare a memorandum assessing the quality of the interview.

[ ] If necessary, prepare the transcription.This is rarely done in the combat theater of operations, and it is usually done only for interviews with general officers or senior commanders. As a general rule, the original tape (and transcript) remains as part of the permanent organizational history file of the corps or division,and a duplicate tape or transcript is forwarded to CMH.

NOTE: A special consideration is that frequently a historian arrives before soldiers are afforded the opportunity to "decompress" after an operation.Therefore, the historian becomes the vehicle for the soldiers to offload emotional pressure.

CONSULT CMH HANDBOOK, *ORAL HISTORY: TECHNIQUES AND PROCEDURES*, FOR COMPLETE INFORMATION ON POST-INTERVIEW REQUIREMENTS.

Appendix C

Sample Military History SOP

XX U.S. CORPS
MILITARY HISTORY STANDARD OPERATING PROCEDURES (SOP)

1. PURPOSE.The purpose of this SOP is to outline responsibilities and procedures for the conduct of historical activities for all U.S. Army units under this command.

2. RESPONSIBILITIES

a. Chief of Staff (CofS). Provides supervision over the corps Military History Office.

b. Corps Historian. Advises the CofS on historical matters. Conducts the responsibilities in Paragraph 3.c.The corps historian will:

(1) Establish and implement this SOP.
(2) Give historical background and assistance to the corps staff and to subordinate commands. When resources permit, the office will help public and private agencies and individuals.
(3) Prepare military history per the Army Historical Program.
(4) Prepare command reports as directed by the chief of military history.
(5) Assist in the collection and advise on the retirement of historical records and source material of corps units.
(6) Prepare historical works as background for the development of corps policies and plans.
(7) Manage Army historical artifacts within the corps.
(8) Manage the Army art activities within the corps area of operations.
(9) Promote interest and study in the field of military history.

c. Primary staff officers/Subordinate commanders down to separate companies will:

(1) Assign a historian or historical officer. Notify the corps historian of the soldier's rank,name, how he/she may be contacted, through the respective chain of command, within 30 days of publication of this SOP.
(2) Provide input or prepare a command report or operations data report , as tasked.

3. ACCESS

a. Historians and historical officers will have access to all materials with the exception of:

(1) Personnel files kept by the G–1.
(2) Confidential evidence obtained from individuals by the Inspector General's Office.
(3) Personal correspondence of military personnel, living or dead, unless they are a part of official records.

b. Unofficial researchers will be granted access to:

(1) Unclassified records, to include those being currently used by the command for the processing of histories.They are in the public domain and may be reviewed without prior approval.

(2) Access to classified documents is governed by 5 USC 552,AR 35–55,paragraph 2–12, and AR 380–5, chapter VII, section I.

4. HISTORICAL RECORDS

a. Computer disks or CD-RW will not be used to retain the unit's sole copy of historical records.These systems are vulnerable to electromagnetic erasure, "viruses," and destruction by several environmental factors. Paper copies of documents will be maintained.

b. Records evacuation.The corps Military History Office will provide guidance under a separate memorandum of instruction.

5. ARMY ART. The Army Art Activity of CMH controls all pieces of Army art. Requests for Army art will be made through the corps Military History Office.

6. HISTORICAL ARTIFACTS

a. Items recovered by technical intelligence personnel at the enemy materiel collection points are transported to the Joint Captured Materiel Exploitation Center. Items received by technical intelligence elements will not be returned to the capturing or finding unit.

b. It is the commander's responsibility to ensure that accountability is maintained for each historical artifact. Commanders who desire to retain artifacts as historical property must ensure that the item has been cleared by technical intelligence personnel and then brought into the Army accountable property system. A list of historical artifacts will be prepared on a DA Form 2609 for entry into the unit property book before the unit departs the theater. A copy must then be sent through the corps historian to CMH. Historical artifacts will be returned to CONUS by the designated unit. Normal disposal action will be taken with all other captured materiel.

c. Units will ensure that each historical artifact has a tag with the following information:

(1) Date found and location by map reference
(2) Type of equipment, quantity, weight, and cubic measurements
(3) Origin of equipment by nation
(4) Brief description with distinguishing markings and technical characteristics
(5) Name and signature of the commander of the finding unit
(6) Name and signature of screening technical intelligence analyst at the enemy materiel collection points.

d.Commanders will ensure artifacts are evacuated to the unit's enemy materiel collection point and segregate designated historical artifacts from other captured materiel.

e. All items of captured enemy equipment being considered as historical artifacts must be screened by technical intelligence personnel to determine their possible intelligence value. Any items determined as having intelligence value will not be retained initially as a historical artifact.

f. Soldiers may keep certain items of enemy equipment,primarily accoutrements and small items found in enemy positions as war trophies. Leaders must caution soldiers about the possibility that such items are booby-trapped.

g. Antiquities (such as items found in a museum),scientific, religious, educational,and/or cultural properties may not be seized. Furthermore, private property of civilians may not be seized for consideration as historical artifacts or war trophies.

7. HISTORICAL SERVICES

a. Historians and historical officers will support their commander and staff by providing reference services.Requests for assistance on studies and historical data should be processed through the history chain of command to the corps historian.

b. Requests for information from other Department of Defense organizations are the responsibility of the corps or division historians. Requests from civilian sources will be complied with by the requirements set by the Freedom of Information Act (5 USC 552) and the Privacy Act (5 USC 552a).

8. HISTORICAL RECORDS AND SOURCE MATERIAL.

a. Historical records and source materials are documents, manuscripts, interviews, publications, maps, photographs, machine-readable material, and recorded and microcopied material.

b. Reproduction and use of classified material is governed by AR 380–5.

c.Commanders and staffs will grant historians or historical officers access to official staff records regardless of date or classification, if operating in their official historian capacity. This information will be used to produce accurate and complete histories of Army activities.

d.Units will collect,preserve, and send documents and artifacts of important historical value to the corps historian. These should be items that may be used in current historical research or whose preservation may be endangered.

e. Units will take photographs to amplify the historical record.

f. The commander will provide for the disposition of files when the unit is unable to care for them through their chain of command to the corps historian. When the unit can resume care, the commander will retrieve them from storage.

9. ORGANIZATIONAL HISTORY

a. Organizational history is the record of a military organization's entire past.The history includes the organization's activities in the larger military force to which it has belonged. Organizational history may include copies of official documents,narrative accounts, photographs,artwork,trophies,historical artifacts,diaries,scrapbooks, movie films, videotapes, and tape recordings.

b. Commanders of TOE organizations that are authorized an organizational color, distinguishing flag, or guidon (except organic companies of battalions) will set up and keep organizational history programs. Commanders should use their organizational history and other historical material to increase individual morale and organizational esprit.

c. Commanders of these organizations will establish and maintain an organizational history file.

Appendix D

Command Report Format

The following command report format blends the requirements of AR 11–33 and AR 870–5.This is a sample only, and the particular circumstances of an individual unit will determine the full nature of the report.The report will be in narrative form. Coverage of items of special interest may be specified in guidelines issued by CMH or the ACCH.

When operations last 30 days or less,units should submit a report no later than 30 days after the end of the operation. When operations continue beyond 30 days, CMH will determine the frequency of reporting. Six-month reporting periods are normal for extended operations.

Historians will reserve part of the report for their commander's personal comments. The comments should include important lessons learned from the commander's perspective. The commander will sign the command report.

The command report should include the following:

- Summary of the operational highlights and activities of the reporting period.The commander should also evaluate those activities.
- Explanation of what was done, how it was done, and the significance of these actions.
- Comments on inadequacies and successful use of doctrine, tactics, equipment,and special techniques.
- Organizational and training activities for the designated reporting period. Information about unit strength, morale, discipline, administrative policies and practices, training methods and problems, and relations with other commands is especially important.
- Difficulties encountered and how the unit met them.
- Information that was available and used by the commander in making plans.
- Cases of improvisation on techniques or equipment to meet local needs.
- Commander's plans (including those rejected) and reasons for selection or rejection.

The unit prepares at least three copies of the report. The preparing headquarters retains one copy for its organizational history file. Two copies are sent through the chain of command to CMH.One of these copies will have all supporting documents and a list of references, such as journals. The other copy, without supporting documents, will also be forwarded. Intermediate levels of command may make copies of this document for their reference.

[CLASSIFICATION]

Issuing Headquarters

Place of Issue

Date

Command Report No. _____

Period Covered: (Date/Time) to (Date/Time)

References: OPLAN/OPORD #

Map Sheets

Narrative Summary

1. Background. A concise narrative summary of the more important events preceding the period to be covered in the command report. It will include both friendly and enemy action that determined the situation existing at the beginning of the reporting period.

2. Task Organization. Can be descriptive.The detailed organization should be in the attachments.

a. Friendly task organization

(1) Unit (Numerical Designation)
(2) Type (Infantry, Armor, Field Artillery, etc.)
(3) Command relationship other than assigned (direct support, general support, attached, etc.)
(4) Location (Grid)
(5) Commander
(6) Combat effectiveness (Commander's Journal)

b. Summary of tactical operations

(1) Enemy situation
(2) Missions
(a) Missions from higher headquarters
(b) Restated missions
(c) Unit commander's intent

3. Chronology of Events.

a. Orders issued

b. Orders received from higher headquarters

c. Unit reports received

d. Movements begun,movements completed

e. Enemy contacts

f. Changes in task organization

g. Events particular to individual Battlefield Operating Systems (BOS)

4.Commander's Comments. Commander should personally write or approve the contents of this paragraph.The unit historian will frequently provide proposed comments to the commander. It is his opportunity to describe the operation from the command perspective.The commander should discuss reasons for success or fail-

ure.The commander may comment on equipment,personnel,training limitations,or other significant issues.The commander may also point out certain individuals who merit recognition.

5. Lessons Learned. Lessons learned should be arranged by Battlefield Operating Systems (BOS) and discussed in the following format:

a. Observation (should indicate if the comment applies to doctrine, training, organization, materiel, or leadership).

b. Discussion

c. Lessons Learned

d. Recommended Action

e. Comments

f. BOS

1) Intelligence
(2) Maneuver
(3) Mobility/Countermobility/Survivability
(4) Fire Support
(5) Air Defense
(6) Command and Control
(7) Combat Service Support

6.Documentation. Attach the following supporting documentation to the command report if available. List them in the following order:

a. Unit-generated information

(1) Operation orders and plans; intelligence summaries
(2) Unit journals.Each staff section at division and higher headquarters keeps its own journal.These should be separated by section and then arranged chronologically. Attached to each journal should be the referenced reports, received and sent fragmentary orders, spot reports, etc.
(3) Official maps, overlays, and charts
(4) Briefing slides and associated scripts,if available. Paper copies of all available slides used to brief unit command group and visitors.
(5) Electromagnetic media. Computer tapes and disks used by the unit during combat operations. Hard disk data should be downloaded onto floppy disks.
(6) Audiovisual tapes. Official cassettes, such as those obtained from gun cameras, remotely piloted vehicles, public affairs teams, combat camera teams, etc.

b. Other official documents

(1) Interviews and statements from participants
(2) Captured enemy maps or documents
(3) Other documents that contribute to understanding the unit's operation

NAME, RANK, DUTY POSITION, AND UNIT OF PREPARER.

NAME, RANK, DUTY POSITION, AND UNIT OF APPROVING OFFICIAL
(USUALLY UNIT CHIEF OF STAFF)

[CLASSIFICATION]

Appendix E

Annual History Format

During most combat situations, the requirement for an annual history is suspended or replaced by the command report. However, in some contingency operations the requirement remains.

Coverage

Choosing topics to be included in the annual history is a continuing process for the historian or historical officer. The historian should keep a file during the reporting period or year on major events and activities and use it as an aid in writing the annual history. The history should be clear, concise, and complete, and it should report all items of historical significance to the command.It should emphasize those events that had a major impact on the policy, organization,and functions of the command. Giving equal coverage to both major and minor matters dilutes the importance of the major ones. Routine activities should be treated only when necessary to provide background and explanation,set patterns,and illustrate trends or management techniques. Specifically, the annual history will include:

- Description and explanation of major organizational, mission, and function changes
- Organizational charts and rosters of key personnel
- Summary of important resources as well as the impact of resources (personnel and funds) on mission accomplishment
- Background and reasons for major policy decisions
- Relationships with higher headquarters and next subordinate commands, including impact of decisions made by higher authority

Classification

Annual histories are usually unclassified; however, they may include items with a higher-level security classification. Histories that include classified material must be properly classified and marked. Limited distribution will be used when material needing added security safeguards is included. If desired and appropriate, commands may place classified material in a separate supplement so that the unclassified portion of the history may receive wider distribution.

Sources and Citations

Each citation of a source should be identified in a footnote or endnote by originator, date, subject and file number, if appropriate, and location. Examples of source documents are:

- Official correspondence and memorandums for record
- Electronic messages
- Journals and journal files
- Minutes of conferences and meetings
- Annual histories from previous years
- In-progress reviews and other periodic reports
- Interoffice memorandums
- Agency directives and orders
- Fact sheets and briefings
- Newspapers, periodicals, and journal articles
- Oral history interviews

Format

- Cover. Annual histories have covers that are heavier than standard bond paper and are bound along the left margin or otherwise fastened to allow the pages to be turned easily. The title, name of the reporting organization, and period covered are included on the cover.
- Title page.The title page is the first page following the cover and includes, in addition to the information above, the assigned requirements control symbol and the author's name and title.The information is displayed as follows:

8TH ARMORED DIVISION
ANNUAL HISTORICAL SUMMARY
(RCS CHIS–6[R4])
1 OCTOBER 1998–30 SEPTEMBER 1999
Major Henry Rothenberg
Historical Officer

- Commander's summary. Remarks following the title page that summarize significant developments, events,activities, readiness,and trends in the command during the previous year. The preface or foreword, if used, follows the commander's summary.
- A required table of contents follows the preface or foreword. It shows major headings, subheadings, and page numbers.A list of tables and a list of illustrations follow the table of contents if more than five of either is included.
- Chapters.Roman numerals are used to number chapters,which cover functional areas. Typical chapter titles may include the following:

  — Mission and Organization
  — Plans
  — Force Structure
  — Intelligence
  — Current Operations
  — Financial Management and Fiscal Controls (Analysis should include the effects of funding on readiness, realistic training, safety, etc., if appropriate.)
  — Resource Management
  — Information Management
  — Personnel Management and Strength (Include organization's opening and closing strengths by officer, warrant officer, and enlisted personnel in terms of authorized,assigned, and deployable strengths.)
  — Training and Exercises (Include examples of training shortcomings as well as achievements, major exercises, results, or Army Training and Evaluation Programs (ARTEP.)
  — Logistics (Cover chronic shortages of supply items,unsatisfactory maintenance experience with certain items of equipment, maintenance backlogs, and effects on readiness.)
  — Base and Host Nation Support
  — Force Modernization
  — Welfare, Recreation, and Morale

- Documentation.Reference footnotes or endnotes are necessary and encouraged for annual historical summaries. Place footnotes at the bottom of each page (preferable) or endnotes at the end of each chapter or section.Include organizational charts and rosters of commanders and key personnel (with dates of assignment to the command) in all annual histories. Other important documents,if carefully selected and explained, can be a valuable addition to the history and prevent a lengthy discussion in the text. Oral history materials, which may be cited in the footnotes, should be submitted to CMH. Source documents are referred to in footnotes or endnotes in accordance with the format in any standard style manual.The CMH Style Guide, if available, should be used.

- Glossary. A list of words and acronyms and their explanations as well as an index will be placed at the end of the annual history.

Appendix F

Sample Historical Estimate

[CLASSIFICATION]

Headquarters
Place
Date, time, and zone

HISTORICAL ESTIMATE NO. _____

References: Maps, charts, or other documents.

1. MISSION.The restated mission determined by the commander.

2.THE AREA OF OPERATIONS. This paragraph discusses the historical aspects of the area of operations.It should answer the general question: "How have previous combat operations in this area been influenced by the weather and terrain?"

a. Previous operations. List previous combat activity in this area, beginning with the most recent examples.

b. Weather

(1) General characteristics. Provide data on light and general weather conditions. May refer to the intelligence estimate.
(2) Effects of weather in this area on previous operations, beginning with most recent examples.

c. Terrain

(1) General characteristics. Historical aspects of the terrain. Examples include the location of historic trails and roads that are no longer used; rivers that once flooded regularly but are now dammed;areas that have historically offered shelter or water, or facilitated offensive or defensive operations;and urban areas that once possessed developed underground communications tunnels.
(2) Effects of terrain in this area on previous operations

d. Other characteristics.Historical aspects of the local region and how they have affected previous operations in this area.

(1) Historic boundaries
(2) Settlement patterns

e. Population

(1) Religious tensions
(2) Minority groups and historic tensions

3. THE ENEMY ARMED FORCES. This paragraph discusses historic aspects of the enemy armed forces. It should answer the general question: "What are the historic influences on the enemy armed force?" and should include:

a. Important victories, defeats, and traditions

b. Development and trends in organization and equipment

c. Development and nature of combat doctrine

d. Development and quality of staffs

e. Character and quality of personnel

f. Character, source, and quality of training

g. Important leaders and events that have influenced development of the force

h. Traditional status of the armed forces in society

i. Other factors of historical importance

4. THE ALLIED ARMED FORCES. This paragraph discusses historic aspects of each of the allied armed forces fighting with the unit in the area of operations. It should answer the general question: "What are the historic influences on the allied armed force that could affect our conduct of operations?"and should include:

a. Important victories, defeats, and traditions

b. Development and trends in organization and equipment

c. Development and nature of combat doctrine

d. Development and quality of their staffs

e. Character and quality of personnel

f. Character, source, and quality of training

g. Important leaders and events that have influenced the development of the force

h. Traditional status of the armed forces in society

i. Historic relationship with Americans and the U.S. Army

j. Other factors of historical importance

5. HISTORIC EXAMPLES AND TECHNIQUES. This paragraph should present historical examples of previous operations, conducted anywhere at any time, that are similar to the mission at hand. The intent is to illuminate potential problems and possible opportunities for the commander's consideration. Employ the following general format:

a. Description of the situation (time, place, antagonists, missions, and terrain)

b. Conduct of the operation

c. Lesson learned or technique displayed

d. Application to current operation

6. HISTORICAL ASSETS AVAILABLE. A list all historical assets available that can possibly be used as part of the historical mission.

7. CONCLUSIONS. Based on all previous information and analysis, conclusions are stated concerning the area of operations, enemy forces,friendly forces,and similar operations.These considerations assist in the selection of a friendly course of action and should include:

a. Historic considerations on friendly operations that should be reviewed in developing friendly courses of action.

b. Historic considerations on courses of action that the enemy has a historic tendency to employ or avoid.

c. Historic consideration of enemy vulnerabilities. Discuss the effects of historic vulnerabilities that are exploitable.

Appendix G

Sample Historical Annex to OPLAN

UNCLASSIFIED

ANNEX W (HISTORICAL) TO FRAGO 1 TO 52 ID(M) DEPLOYMENT ORDER 00–00

References:

a. FM 20–17 *Military History Operations*, July 1998.

b. MAPS, SERIES 1501 JOG (G) EDITION 1, SCALE 1:250,000, SHEETS: NI 11–1 (BAKERSFIELD), NI 11–2 (TRONA), NI 11–3 (KINGMAN), NI 11–5 (SAN BERNARDINO), NI 11–6 (NEEDLES); NJ 11–10 (FRESNO), NJ 11–11 (DEATH VALLEY), NJ 11–12 (LAS VEGAS), NJ 11–14 (LOS ANGELES). (WGS–84).

1. SITUATION.

a. Enemy Forces.

(1) Historical aspects of the area of operations. Tierra del Diablo Country Study.
(2) Historical aspects of enemy forces. Tierra del Diablo Country Study.

b. Friendly Forces.

(1) X U.S. Corps historical mission.Corps immediately begins collecting historical material on planned and actual combat operations in the Tierra del Diablo Island area of operations (AO) and produces an initial historical monograph describing corps operations and pertinent historical sources.
(2) MOJAVIAN forces. Omitted.
(3) 25 AD. Omitted.
(4) 313 SIB(M). Omitted.

c. Historical Plan of X U.S. Corps Headquarters. Priority of historical collection is, in order, to 35 AD, 52 ID(M), 313 SIB(M).

(1) Historical assets available in theater. 25 AD, 52 ID(M) and 313 SIB(M) Military History Offices.
(2) Historical assets supporting 52 ID(M). None.
(3) Historical assets of supporting/cooperating allied forces. None.

d. Attachments and Detachments. 20 Military History Detachment (MHD) is attached.

2. MISSION. 52 ID(M) immediately begins collecting historical material on planned and current combat operations in the Tierra del Diablo Island AO and produces an initial historical monograph describing division operations and pertinent historical sources.

3. EXECUTION.

a. Intent. To preserve the operational records of 52 ID(M) operations in Tierra del Diablo to enable writing the history of those operations.

b. Concept of Operation.The 52 ID(M) Military History Office supervises and directs Army historical collection activity in the AO, ensuring that necessary historical records and artifacts are collected, cataloged, and forwarded to the X U.S. Corps Military History Office and supervises preparation of a battle chronology, roster of key personnel, and a draft historical monograph describing the operation and the pertinent supporting historical source material, all NLT 14 days following the operation.

(1) Priority of historical collection. Initially to the 1 Brigade Combat Team (1 BCT), then 2 BCT and other participating Army, joint,and allied units, and to historical information relating to the planning, preparation, and execution of, in order, combat,combat support, and combat service support operations.

(2) 2 BCT commander's guidance.The 52 ID(M) Military History Office coordinates with the 2 BCT to obtain the commander's initial guidance respecting historical collection, contact information for the brigade historical officer, and to arrange for direct coordination between 20 MHD and the brigade.

(3) Historical information collection plans.The 52 ID(M) Military History Office furnishes 20 MHD with the operational record preservation plan (Appendix 1), oral history interview plan (Appendix 2), and historical properties collection plan (Appendix 3),and directs the detachment to commence detailed coordination with the brigade historical officer.

(4) Be prepared to receive attachment of 20 MHD. Arrange theater in-processing and mission orientation for the detachment.

c. Historical Tasks to Subordinate Units.

(1) 2 BCT:

(a) Designate a brigade historical officer to advise and assist the unit to collect historical information pertinent to the operation IAW AR 870–5, AR 870–20, FM 20–17, and other guidance.

(b) Collect and retire unit records IAW AR 25–400–2 and MACOM policy.

(c) Provide unit historical input into higher headquarters command reports IAW AR 870–5 and FM 20–17.

(d) Provide historical liaison and CSS support to 20 MHD while the Detachment collects historical information in the Brigade AO.

(2) 20 MHD. Beginning on arrival in theater 20 MHD is in general support of 52 ID(M) reinforcing (GS/R) 2 BCT vicinity Fort Irwin City, Tierra del Diablo; advises and assists the brigade in collecting historical information about its participation in the operation; and following the operation prepares a battle chronology, key personnel roster, and draft monograph outline describing the brigade's combat operations on Tierra del Diablo Island and the supporting historical source material. Specific tasks to be completed NLT 72 hours following the operation unless otherwise stated:

(a) Operational records. Advise and assist 2 BCT to collect, catalog, and forward to the 52 ID(M) Military History Office historical information pertinent to the brigade operation IAW Appendix 1(Operational Records Preservation Plan) to Annex W (Historical).

(b) Oral history interviews. Conduct oral history interviews of key participants IAW Appendix 2 (Oral History Interview Plan) to Annex W. Coordinate with Combat Camera, CALL, Army Materiel Command (AMC), and other collection agencies to ensure proper interview coverage, avoid unnecessary duplication, and ensure appropriate cataloging and dissemination of results among these agencies.

(c) Unofficial documents. Collect historical information to supplement the BCT's unit MARKS record collection,specifically: paper and electronic diaries, personal notes, letters, diagrams, drawings, briefing charts, photographs, audio and video tapes, and other unofficial memorabilia that assist in describing the BCT's operation.

(d) Historical properties. Advise and assist 2 BCT to collect, catalog, and forward to the 52 ID(M) Military History Office any historical properties pertinent to the brigade operation IAW Appendix 3 (Historical Properties Collection Plan) to Annex W.

(e) MHD-created historical products. NLT 14 days following the operation, submit to the 52 ID(M) Military History Office a battle chronology, a roster of key personnel, and a draft monograph describing the operation and the supporting historical source material.

(f) MHD sustainment. 20 MHD is OPCON to 2 BCT for CSS while operating in the brigade area.

d. Tasks to Other Historical Assets. None.

e. Coordinating Instructions.

(1) MHD situation reports. Due in writing to 52 ID(M) Military History Office 1200 Hours daily while in theater, beginning on day after arrival in theater. 52 ID(M) Military History Office TACSOP.

(2) General historical collection requirements. Collect and catalog historical information and artifacts IAW AR 870–5, AR 870–20 and FM 20–17.

(3) Specific guidance on rehearsals, battle analysis seminars, or terrain walks. Omitted.

(4) Names, ranks, positions, and objectives of other historians who may be in the area. None.

(5) Records collection/processing procedures.

(a) 20 MHD ensures collection of planning, execution,and other historical documents and artifacts including, but not limited to, briefing charts and slides, Gantt charts, operation plans and orders, maps and overlays,journals,communications logs,e-mail and other digital records, photographic records (including videotapes,slides, prints, negatives, and digital files), and audio tapes and digital records. All records must be identified unambiguously as to time, place, participants, locations, and content.

(b) 20 MHD verifies proper cataloging of all historical records and properties prior to forwarding to the 52 ID(M) Military History Office.

(c) NLT 7 days following the operation,20 MHD outbriefs the 2 BCT historical collection effort and turns over all collected historical information, along with associated logs and finding aids, to the 52 ID(M) Military History Office.

4. COMBAT SERVICE SUPPORT.

a. Technical supplies. 52 ID(M) Military History Office TACSOP.

b. Reference material available and method of distribution. 52 ID(M) Military History Office furnishes theater maps and initial theater orientation to 20 MHD.

c. 2 BCT POC for CSS for 20 MHD: [rank, name, telephone, e-mail].

5. COMMAND AND SIGNAL.

a. 52 ID(M) Command Records Manager: [rank, name, telephone, e-mail].

b. 52 ID(M) Command historian: [rank, name, telephone, e-mail].

c. 2 BCT Historical Officer: [rank, name, telephone, e-mail].

d. 20 MHD Commander: [rank, name, telephone, e-mail].

ACKNOWLEDGE:

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MG

OFFICIAL:

PIKE
52 ID(M) COMMAND HISTORIAN

APPENDIXES:
Appendix 1 Operational Record Preservation Plan
Appendix 2 Oral History Interview Plan
Appendix 3 Historical Properties Collection Plan

APPENDIX 1 (OPERATIONAL RECORDS PRESERVATION [ORP] PLAN) TO ANNEX W (HISTORICAL) TO 52 ID(M) DEPLOYMENT ORDER 00–00

1. SITUATION. After Operation DESERT STORM, critical documentation on the activities and locations of participating units and soldiers could not be found.It is believed this was caused by a failure to prepare and preserve records of the contingency operation. The consequences of this failure became apparent when HQDA began investigating possible causes for Gulf War illnesses.

2. MISSION. Unchanged.

3. EXECUTION.

a. Intent. To ensure that units assigned and attached to 52 ID(M) collect and preserve records from operational events as directed by Army Regulation 25–400–2, *MARKS*.

b. Concept. The 52 ID(M) Operational Records Preservation Plan is designed to prevent the loss of documents from contingency operations now and in the future.

(1) Units deployed to or involved in contingency operations are required to manage their records in accordance with this plan. The term “units” includes all organizations formed into task force configuration, including CONUS-based Active and Reserve Army elements assigned and attached to 52 ID(M).

(2) Abbreviations and special terms used in this appendix are explained in Enclosure 1 (Definitions) to this appendix.

(3) This program applies to all forms of unit-generated records, whether produced in either paper or electronic formats (electronic mail, diskettes, compact disk, etc.). Operational records are outlined in Enclosure 2 (Operational Records) to this appendix. The most common unit-generated operational records include Daily Staff Journals, Situation Reports (SITREPs), Commander Assessments, Spot Reports, Serious Incident Reports,Operation Plans (OPLANs, Fragmentary Orders (FRAGOs), Intelligence Reports, personnel and logistics reports, and any report generated to describe the occurrence of a particular event. [Medical records will NOT be turned in, to avoid misfiling of real medical records.]

c. 52 ID(M) Operational Records Preservation (ORP) Office. Responsible for the implementation of this plan.The ORP Office will:

(1) Ensure that records preservation is included in planning for contingency operations.

(2) Assist units in the collection, transfer, and retirement of operational records pertaining to contingency operations.

(3) Ensure operational records received from units during contingency operations are properly processed and transferred to the appropriate records holding area.

(4) Maintain a database that will describe records received and their disposition.

(5) Establish and operate a Division Records Holding Area (DRHA) in each divisional theater of operations.

d. Subordinate Units. Commanders of units down to separate company level that are deployed to or involved in contingency operations will manage and supervise record-keeping systems within their commands. Specifically, they will:

(1) Develop supporting plans for the maintenance and transfer of operational records in accordance with this appendix.

(2) Appoint records management personnel to carry out the records preservation program.

(3) Maintain DA Form 1594, Daily Staff Journal or Duty Officer's Log, during contingency operations in accordance with AR 220–15, *Journals and Journal Files*.

(4) Ensure their operational records are transferred in accordance with guidance outlined in paragraph 1–6 of this plan and instructions from the 52 ID(M) ORP Office.

(5) Ensure operational records from all subordinate activities,assigned or attached for the contingency operation, are consolidated and included in their submission.

(6) Ensure all remaining records are transferred upon completion of the contingency operation.

e. Coordinating Instructions.

(1) General.

(a) The 52 ID(M) ORP Plan is the standard program in 52 ID(M) for preparing, collecting, transferring, and preserving contingency operation records. To preclude loss or destruction of these documents, contingency operations records are to be transferred to the DRHA after end of mission.

(b) The designated records management personnel for each unit are responsible for identifying, collecting, preparing, and transferring records.

(2) Records Identification. Operational records are those documents that record the location and activities of units and soldiers involved in combat contingency operations.AR 220–15 requires that DA Form 1594 be maintained when units are deployed to contingency operations.The daily staff journal may be provided in automated or paper format. Other unit-generated records in paper or electronic format discussed in 3. a. (2) above are also to accompany a unit's submission.

(3) Records Collection.

(a) The records management personnel receive records from subordinate activities and prepare them for transfer.

(b) Original records are required for those in paper formats. Records, which are in electronic format may be transferred on diskette or compact disk.A copy of a record should be maintained by the unit if required for future operations.Do not provide information-gathering activities, such as history and lessons learned detachments,with original record copies.If appropriate, these activities should be provided a reproduced copy.

(4) Records Preparation.

(a) Transfer of records will be done on or after the effective date for end of mission. The closing date for records preparation is the last calendar day of the operation. Records should be transferred to the 52 ID(M) (DRHA) (located in the MCC adjacent to the Dust Bowl) NLT 2 days after the closing date.

(b) Records to be transferred should be packed in official record containers (national stock number 8115–00–117–8249).If official records containers are not readily available, any box or envelope will suffice. Do not write on or mark the outside of the record container.

(c) Records management personnel will document transfers on an SF 135, Records Transmittal and Receipt. Records management personnel are responsible for completing the SF135 and forwarding it with the records.The SF 135 will be completed in accordance with AR 25–400–2 and the following 52 ID(M) specific instructions:

- Item 1: Enter "52ID(M) Command Records Holding Area."
- Item 2: Enter the name of the records management personnel of the organization.
- Item 3:Enter the name and telephone number of the records management personnel (home station).
- Item 4: Leave blank.
- Item 5:Enter the full unit address (home station).Include the name of the task force (e.g., Task Force Eagle, if applicable) and contingency operation (e.g., Operation JOINT FORGE).

(d) Electronic records should be labeled with the unit name, type records,month/year and software application (e.g. 1/99 Inf Bn, Daily SITREPs, Feb 1999, Microsoft Word 97).The corresponding SF 135 should also reflect the software application and version.

f. Records Transfer. The DRHA will collect,consolidate and transfer all records for the operation to the CRHA.This should be accomplished within 7 days of end of mission by mail through the Military Postal System (MPS), no postage required.

4. COMBAT SERVICE SUPPORT. Unchanged.

5. COMMAND AND SIGNAL.Unchanged.

ACKNOWLEDGE:

SLASH
MG

TABS:
A. Definitions
B. Operational Records

TAB A (DEFINITIONS) TO APPENDIX 1 (OPERATIONAL RECORDS PRESERVATION [ORP] PLAN) TO ANNEX W (HISTORICAL) TO 52 ID(M) DEPLOYMENT ORDER NO. 00–00

Electronic data

Records and information created,stored, received,and retrievable by electronic means (for example, official organizational electronic mail, diskettes, and compact disks).

Intelligence records

Documents that provide a historical record of the unit's intelligence-gathering efforts.These documents include military-intelligence operational management records, counterintelligence files, special operations records, captured information documents, and scientific and environmental reports.

Medical records

All medical documents that record and trace the medical history of individuals involved in an operational deployment. This includes command health records, individual health records, dental records, outpatient records, inpatient records, and field medical cards.

Operational records

Documents that record the location and activities of units and soldiers involved in contingency operations. This includes troop lists, staff journals, operation orders, incident reports, maps, overlays, and electronic data. These documents are used to command, control, direct, and record progress during the operation.

Records management personnel

The individual at each headquarters or major staff section who is responsible for the collection, accountability, and transfer of unit records according to AR 25–400–2 and this plan.

52 ID(M) Division Records Holding Area (DRHA)

The 52 ID(M) temporary facility at Fort Irwin, Tierra del Diablo, that processes, stores, and maintains inactive records pending their transfer to the CRHA.

X U.S. Corps Command Records Holding Area (CRHA)

The X U.S. Corps facility at Fort McPherson, GA, that processes, stores, and maintains inactive records pending their destruction or transfer to unclassified (DCSPER) or classified (see below) CONUS repositories.

U.S. Army Intelligence and Security Command Records Center (USAISCRC)

The federal records center that processes, stores, and maintains classified intelligence records pending their destruction. 52 ID(M) units do not forward records directly to this center. The DRHA receives intelligence records from units, processes these records, and forwards them to the CRHA, which forwards them to USAISCRC.

U.S. Army Center of Military History (USACMH)

The federal records center that processes, stores, and maintains classified records for units participating in contingency operations (excluding intelligence records) pending their destruction. 52 ID(M) units do not forward records directly to this center. The DRHA receives classified records from units, processes these records, and forwards them to the CRHA, which forwards them to USACMH.

TAB B (OPERATIONAL RECORDS) TO APPENDIX 1 (OPERATIONAL RECORDS PRESERVATION [ORP] PLAN) TO ANNEX W (HISTORICAL) TO 52 ID(M) DEPLOYMENT ORDER 00–00

Functional Area Requirement	*File Number*	*Description*	*Prescribing Publication**
Medical	40–5d	Command Health Reports	AR 40–5
	200–1c	Hazardous Material Management Files	AR 200–1
Field Org.	220–15a	Daily Staff Journals and Tactical Operations Center Logs	AR 220–15
Information	360–5b	News Media Releases	AR 360–5
	360–5d	News Queries	AR 360–5
Intelligence	380–13c	Counterintelligence, Special Operations	AR 380–13
	381–3a	Military Intelligence Operational Management Files	DIAM 58–3
	381–3b	Military Intelligence Operational Management Reports	DIAM 58–3
	381–3c	Military Intelligence Operational Non–management Reports	DIAM 58–3

	381–3d	Military Intelligence Operational Mission Assignments	DIAM 58–3
Safety	385–10f	Accident and Incident Cases	AR 385–10
	385–11j	Radiation Reports	AR 385–11
	385–11j	Radiation Incident Reports	AR 385–11
Operations	525a	Daily, Weekly, and Monthly Status Reports	AR 525–1
	525a	Commander's Assessment Reports	AR 525–1
	525a	Situation Reports (SITREPs)	AR 525–1
	525a	SPOT Reports	AR 525–1
	525n	Operation Planning Files, Operational Plans (OPLANs)	AR 525–1
	525p	Operation Procedure Files	AR 525–1
	525p	Operation Orders (OPORDs)	AR 525–1
	525p	Fragmentary Orders (FRAGOs)	AR 525–1
	525p	Warning Orders (WARNOs)	AR 525–1
Personnel	600–8c	Personnel Strength Reports	AR 600–8
	600–25b	Visitor Files	AR 600–8

*Prescribing Publications:

Defense Intelligence Agency Manual 58–13 (S/NOFORN), *Defense Human Resources Intelligence Collection Procedures (U)*
AR 40–5. *Preventive Medicine*
AR 40–400, *Patient Administration*
AR 200–1, *Environmental Protection and Enhancement*
AR 220–15, *Journals and Journal Files*
AR 360–5, *Public Information*
AR 380–13, *Acquisition and Storage of Information Concerning Nonaffiliated Persons and Organizations*
AR 381–19, *Intelligence Dissemination and Production Support*
AR 381–45, *Investigative Records Repository*
AR 381–100 (S), *Army Human Intelligence Collection Programs* (U)
AR 385–10, *Army Safety Program*
AR 385– 11, *Ionizing Radiation Protection (Licensing, Control, Transportation,Disposal, and Radiation Safety)*
AR 525–1, *The Department of the Army Command and Control System*
AR 600–8, *Military Personnel Management*

NOTE:The Records Preservation Matrix is only a partial list of files that units should maintain. Files not listed in the matrix that document unit activities will also be preserved.

APPENDIX 2 (ORAL HISTORY INTERVIEW PLAN) TO ANNEX W (HISTORICAL) TO 52 ID(M) DEPLOYMENT ORDER 00–00

1. SITUATION. Unchanged.

2. MISSION. Unchanged.

3. EXECUTION.

a. Intent. Use standard oral history interview techniques to capture a balanced view of the BCT's upcoming combat operation on Tierra del Diablo, covering every battlefield operating system (BOS) at every

appropriate echelon. The resulting collection of interviews should supplement and place in proper context the other historical records being collected.

b. Concept. The MHD should attempt to interview the key personnel (or the given types of key personnel) listed in Enclosure 1 (Interview Schedule), closely following the given chronological priority ("PRI" column).The priority 1 and 2 interviews should be conducted first,because they should provide the MHD with the best and quickest overview of the brigade's battles, so as to better understand and place in proper context subsequently collected materials. The BCT TOC primary shift leader (sometimes called a battle captain)—a brigade Assistant S–3—will be very knowledgeable about the BCT operations overall. It is important that the entire MHD hear his interview/presentation. Priority 3 and 4 interviews will give the MHD exposure to the remaining BOS. Once the MHD has a working grasp of the role each BOS plays in combined arms operations, the sequencing of the remaining interviews is less critical.

c. 2 BCT.

(1) Known and likely interview subjects should be notified prior to the operation that they will or may be interviewed during force regeneration in the 72 hours following end of mission.

(2) Interviewees should be reminded again when the end of mission FRAGO is issued.

(3) Each interview should furnish the MHD the best possible array of information about the interviewee's experience in the operation. Interviewees should:

(a) Bring key members of their staff or entourage to their interview.

(b) Bring and furnish the MHD with originals or copies of key documents which relate to their own and their unit's or section's experience. See Appendix 1 (Operational Records Preservation Plan).

(c) Employ and furnish the MHD with appropriate audiovisual aids to explain and clarify their presentation. Some interviews may take on the appearance of formal briefings.

d. 20 MHD.

(1) Complete the standard oral history interview waiver form prior to each interview.

(2) Take two photographs of each interviewee: 1 bust showing chest and shoulder insignia and 1 full-length.

(3) Assist the interviewee(s) to prepare any original documents for turn-in to the DRHA. See Appendix 1 (Operational Records Preservation Plan).

(4) Complete the standard field history notes immediately after each interview.

(5) Review the interview tape the same day, making a subject and key-word finding aid,which should be inserted in or appended to the field history notes.

(6) Transcribe the tape on the same day if it is a high priority interview. Furnish a copy of the transcript ASAP to the interviewee for comment.

(7) Label, catalog, and cross-reference all materials connected with each interview, including tapes,tape containers, photographs and negatives,field history notes,audio and visual aids,original records,unofficial documents, and other memorabilia furnished.

e. Coordinating Instructions.

(1) The MHD and BCT should arrange for one interview or series of interviews to be conducted at the site(s) where the interviewees fought their battle(s).

(2) The BCT may need to furnish a vehicle to transport its own soldiers for these interviews, if the number of soldiers exceeds what will fit in the MHD's HMMWV.

(3) In addition to normal interview requirements, the MHD should take photographs to illustrate and clarify the interview narrative.

(4) After coordinating with the element to be interviewed,the MHD should prepare and execute a small unit movement order for the battlesite interview event.

4. SERVICE SUPPORT. No change.

5. COMMAND AND SIGNAL. No change.

ACKNOWLEDGE:

SLASH
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TABS:
A. Interview Schedule

TAB A (INTERVIEW PLAN) TO APPENDIX 2 (ORAL HISTORY INTERVIEW PLAN) TO ANNEX W (HISTORICAL) TO 52 ID(M) DEPLOYMENT ORDER 00–00

BOS	TITLE	UNIT	RK	NAME	DATE	TIME	LOCATION	INTERVIEWER	PRI	REMARKS
C2										
MVR										
MI										
FS										
MC/M										
AD										
CSS										
MISC										

APPENDIX 3 (HISTORICAL PROPERTY) TO ANNEX W (HISTORICAL) TO 52 ID(M) DEPLOYMENT ORDER 00–00

1. SITUATION.

a. Enemy. Unchanged.

b. Friendly. C/200 MI Bn DS 52 ID(M) as technical intelligence element at division enemy materiel collection point (DEMCP) vic Fort Irwin City.

2. MISSION. Unchanged.

3. EXECUTION.

a. Intent. Collect and retain as historical property items which illustrate or otherwise supplement the history of the 52 ID(M)'s upcoming combat operation on Tierra del Diablo.

b. Concept. Enemy equipment which may be usable tactically and/or for intelligence or historical purposes must be processed IAW the following sequence:initial cataloging; evacuation to a DEMCP, technical intelligence screening; historical property assessment and inventory; historical artifact allocation; establishment of property accountability; movement to CONUS. Priority of consideration should go to tactical vehicles, weapons, and rare or unusual equipment (no types are excluded from consideration) in operational condition and/or whose specific activities in this operation are known. The urgency of this effort depends on the potential intelligence, tactical, or historical value of the particular equipment and/or the risk to friendly forces and operations if it remained in place or fell into hostile hands.

(1) Initial cataloging. At the time of initial recovery, or as soon as possible thereafter, capturing/finding units must tag each recovered enemy item with the following information:

(a) Date found and location by map reference
(b) Type of equipment, quantity, weight, and cube
(c) Origin of equipment by nation
(d) Brief description with distinguishing markings and technical characteristics
(e) Name and signature of the commander of the finding unit
(f) Name and signature of the screening technical intelligence analyst at the DEMCP

(2) Evacuation to a DEMCP. The capturing/finding unit must ensure that the enemy materiel is recovered to a DEMCP as soon as possible after assuming possession, consistent with the tactical situation.

(3) Technical intelligence screening. Captured enemy equipment being considered as historical artifacts must be screened by technical intelligence personnel at a DEMCP to determine its possible intelligence value. Items determined to have intelligence value will be retained by technical intelligence elements and not returned to the capturing/finding units. Items recovered by technical intelligence are to be transported to the Joint Captured Materiel Exploitation Center (JCMEC).

(4) Historical property assessment and inventory. The division historian is responsible to assess all enemy materiel released by technical intelligence personnel for its suitability as historical property; inventory all suitable items by quantity and description (noun nomenclature if possible); and forward the inventory through the corps historian to CMH.

(5) Historical artifact allocation. Based on subsequent guidance from higher headquarters, the division commander will specify the disposition of all suitable enemy equipment and allocate the types and quantities that particular units or kinds of units may accession.Units allocated a quota then may submit their requests for specific enemy items, with justifications, to the division historian, who will consolidate all requests, coordinate with the division museum curator, and submit a recommended allocation to the division commander for decision.

(6) Establishment of property accountability. Each historical artifact approved for accession must be entered on a DA Form 2609 and recorded in the unit property book prior to its departing the theater. A copy of each DA Form 2609 must be sent through the division and corps historians to CMH.

(7) Physical security. Commanders must ensure that designated historical artifacts are segregated from other captured material.

(8) Movement to CONUS. Designated accessioning units are responsible to arrange for the transportation of their historical artifacts to CONUS, and for normal disposal of other captured enemy materiel.

(9) War trophies. Soldiers may keep certain items of enemy equipment as war trophies. This is primarily limited to individual soldier accoutrements and small items found in enemy positions. MACOMs are authorized to coordinate with the division provost marshal to arrange times and places for individuals to have their war trophies approved. Leaders must caution soldiers about the possibility that such items may be booby-trapped.

(10) Antiquities and private property. Scientific, religious, educational, and/or cultural properties (such as items found in a museum) and property of civilians may not be seized for consideration as historical artifacts or war trophies. Any such items that erroneously come into a unit's possession are to be forwarded to the division G–5 Civil Affairs, through military police lost/stolen property channels.

4. SERVICE SUPPORT. DEMCP location: grid NV2960165.

5. COMMAND AND SIGNAL. No change.

ACKNOWLEDGE:

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Glossary

ABBREVIATIONS

ACCH	Army component command historian
AHP	Army Historical Program
AMC	U.S. Army Materiel Command
AMS	Army Museum System
AO	Area of operations
AR	Army regulation
ARTEP	Army Training and Evaluation Program
ASI	Additional specialty identifier
BCT	Brigade combat team
BOS	Battlefield Operating System
CALL	Center for Army Lessons Learned
CAP	Crisis Action Planning
CARS	Combat Arms Regimental System
CMH/OCMH	U.S. Army Center of Military History (formerly Office, Chief of Military History)/Chief of Military History
COA	Course of Action
COMCAM	Combat Camera
CONPLAN	Concept plan
CONUS	Continental United States
CQ	Charge of quarters
CRHA	Command records holding area
CSI	Combat Studies Institute
CTC	Combat Training Center
DA	Department of the Army
DAHAC	Department of the Army Historical Advisory Committee
DAHSUM	Department of the Army Historical Summary
DEMCP	Division enemy materiel collection point
DOD	Department of Defense
DRHA	Division records holding area
FM	Field Manual
FORSCOM	U.S. Army Forces Command
FRAGO	Fragmentary orders
HQDA	Headquarters, Department of the Army
IAW	In accordance with
IMA	Individual mobilization augmentee

JCS	Joint Chiefs of Staff
JOPES	Joint Operational Planning and Execution System
MACOM	Major Army command
MARKS	Modern Army Recordkeeping System
MHD	Military history detachment
MHE	Military history element
MHHC	Military History Coordinating Committee
MHI	U.S. Army Military History Institute
MOOTW	Military operations other than war
MOS	Military occupational specialty
MPAD	Mobile public affairs detachment
MTOE	Modification table of organization and equipment
MWR	Morale, welfare, and recreation
NARA	National Archives and Records Administration
NLT	Not later than
ODR	Operations data report
OPCON	Operational control
OPLAN	Operations plan
OPORD	Operations order
ORP	Operational records preservation
POC	Point of contact
RMDA	Records Management Declassification Agency
SASO	Stability and support operations
SDO	Staff duty officer
SI	Skill identifier
SITREP	Situation report
SOP	Standard operating procedures
TDA	Table of distribution and allowances
TDY	Temporary duty
TOE	Table of organization and equipment
TPFDD	Time-Phased Force and Deployment Data
TRADOC	U.S. Army Training and Doctrine Command
UIC	Unit identification code
USAR	U.S. Army Reserve
USARS	U.S. Army Regimental System

TERMS

Annual history

A narrative account of the operations and activities of an Army organization covering the historically significant developments and events that took place in the command during a specific fiscal or calendar year.

Army art

Original art objects owned or controlled by the Department of the Army, including paintings,watercolors,drawings, prints, cartoons, sculpture, sketches, and miscellaneous visual art forms depicting military activities or expressing the artist's reaction to combat or other military experience.

Army Art Central Collection

Art in the immediate custody of the chief of military history and over which the chief of military history exercises direct control.

Army Historical Collection

The entire historical collection under the control of the chief of military history, to include historical artifacts in the custody of installations, units, or agencies.The Army Historical Collection forms a part of the national historical collection.

Army Long-Range Planning Guidance

A biennial document providing continuity in planning over a thirty-year period to guide the Army into the twenty-first century. Central to its purpose is the disciplined management of change. It describes the environment within which the Army of the future must be prepared to operate and the capabilities required to support national security objectives.

Army Museum System

All museums and historical holdings that are within the U.S. Army and under the staff supervision of the chief of military history.

Combat Arms Regimental System

The concept under which combat arms (infantry, artillery, armor, and cavalry, except armored cavalry regiments) were organized between 1957 and their reorganization in 1981 under the U.S. Army Regimental System.

Combat and contingency operations

Those activities caused by combat, civil disturbance, natural disaster, or other emergency or special activities, as well as by associated support operations.

Command report

A summary of the operational highlights and activities of a unit for a specific reporting period,as directed by the theater commander and historian in conjunction with the chief of military history. Command reports are normally researched and written by professional historians.

Historian

An individual,either military or civilian,who occupies a full-time military history position specified by a table of distribution and allowances (TDA),table of organization and equipment (TOE),or modification table of organization and equipment (MTOE). Historians should have advanced professional degrees.

Historical artifacts

Historically significant items that have been designated historical artifacts by the chief of military history, an installation commander, or the commander of a military organization. Such objects also may not have been so designated but, because of their age or obvious historical significance, are inherently historical artifacts.

Historical officer

An individual who is responsible for military history activities in addition to other duties. This person should be a military officer with the additional specialty identifier (ASI) 5X (historian), per AR 611–101, or can be a civilian.

Historical property jacket

A file folder that contains documentation of any kind pertaining to a cataloged artifact.

Historical records

Historical records should not be confused with historical documents, although they may be the same in some instances. Historical records are part of the unit's official records and must be retired under records management policies. If a historian wants to make a document in the unit's official records a historical document, it must be a copy rather than the original document.

Historical research collection

Historically significant documents from a specific organization,including annual histories,special studies,monographs, reports,manuscripts,organizational charts and directories,messages,correspondence, interview tapes and transcripts, maps and overlays, and electronic records.The unit's organizational history file is a subset of the historical research collection.The collection serves as the institutional memory of an organization, provides a basis for original research and preparation of narrative history and for bringing historical perspective to bear on the organization's planning and decision-making processes, and supports leadership development programs.

Historically significant properties

Artifacts and other articles of significance not specifically designated as historical artifacts.

Historically significant items include, but are not limited to, weapons,military equipment,articles of clothing and personal equipment, flags, works of art, unit and individual decorations, and campaign streamers. They also include other objects, except official records, that constitute relics or evidence of battle experience or other military activity of local or national significance to U.S. or foreign armed forces.

A property may have historical significance because it is associated with an important person, event, or place; because it has a traditional association with a military organization; or because it is a representative example of military equipment.

Reproductions,models, and dioramas may be considered historically significant properties, but normally they are not. (See AR 870–20, para 2–4.) Athletic trophies,prizes,and other items of transitory significance or of morale or sentimental value but not pertinent to the history or traditions of the owning agency, of U.S. or foreign armed forces, or of military history are not generally considered to have historical significance within the meaning of AR 870–20.

Honors

Unit decorations and credit for campaign participation and war service that have been bestowed upon an organization by a competent authority.

HQDA

Headquarters,Department of the Army, consisting of the secretary of the Army; Army Secretariat; chief of staff, Army; and Army Staff and its field operating agencies.

Lineage

The line of descent of an MTOE unit from its origin, stated in terms of events that have changed its status.

Military history

A record of military and related activities in peace and war, including history written by official Army organizations. In this field manual, military history is used in both general and official contexts.

Military operations other than war

Normally contingency operations, but may include an emergency that requires the deployment of military forces to deal with natural disasters, terrorism, or early projection of national power into a contingency situation. Peacekeeping and the various countermissions (such as counterdrug operations) are included in this category of military operations short of war.

Modification table of organization and equipment

A document that prescribes the modification of a basic table of organization and equipment necessary to adapt it to the needs of a specific unit or type of unit.

Monograph

An in-depth,systematically researched and presented historical work, which focuses on a single subject or event.

Operations data report

Annotated chronologies of the unit's operations that will be fully supported by an indexed set of key historical documents. Unit historical officers will compile ODRs in lieu of command reports.

Oral history

An integral part of the Army Historical Program that involves interviewing participants or experts in a particular subject or issue and preserving their judgments and recollections. Oral history materials—audio and/or video recordings, transcribed interviews, interview notes and memorandums—supplement, but do not replace, official written records. Oral history materials contain information not normally preserved in official documents. They are compiled for reference purposes and are not considered official Army records.

Organic element

A unit that is an integral part of a larger organization,for example, a lettered company of a battalion,as prescribed in the MTOE.

Organizational historical artifact

Historical artifact of unique significance to and belonging to a particular Army organization.

Organizational history file

A compilation of documentary evidence of the organization's history and traditions.It is mandatory that the unit collect, organize, and maintain an organizational history file, which should include significant documents, photographs, and other items pertaining to its history and traditions.

Parent regiment

An administrative entity organized under the Combat Arms Regimental System or the U.S. Army Regimental System to perpetuate the history of the elements of the organization.

Special designation

An authorized nickname granted to a military organization. A special designation is not to be confused with a motto, which is part of a unit's heraldic items. (See AR 840–10.)

Stability and support operations (SASO)

A new doctrinal term that includes the same kinds of operations as those considered military operations other than war.

Table of distribution and allowances

A document that prescribes the organizational structure and the personnel and equipment authorization and requirements of a military unit to perform a specific mission for which there is no appropriate table of organization and equipment.

Table of organization and equipment

A document that prescribes the official designation,normal mission,organizational structure, and personnel and equipment requirements for a military unit and is the basis for an authorization document.

Unit

Any military organization whose structure is prescribed by a competent military authority and which has its own unit identification code (UIC).

Unit history

An informal narrative which covers the entire history of a specific unit, written in an easy-to-read manner for the benefit of the soldiers in the unit.

Unit identification code

A six-character symbol identifying each unit in the Army.

U.S.Army Regimental System

In this manual, a term applied only to the following combat arms regiments: Air Defense Artillery, Armor, Aviation, Cavalry, Field Artillery, Infantry, Rangers, and Special Forces. See AR 600–82, *The U.S. Army Regimental System.*

References

REQUIRED PUBLICATIONS

AR 25–30	*The Army Integrated Publishing and Printing Program*
AR 25–400–2	*The Modern Army Recordkeeping System (MARKS)*
AR 220–5	*Field Organizations: Designation,Classification, and Change in Status of Units*
AR 220–15	*Journals and Journal Files*
AR 600–3	*The Army Personnel Proponent System*
AR 600–8–22	*Military Awards*
AR 840–10	*Flags, Guidons, Streamers, Tabards, and Automobile and Aircraft Plate*
AR 870–5	*Military History: Responsibilities, Policies,and Procedures*
AR 870–20	*Museums, Historical Artifacts, and Art*
ARTEP 20–17–MTP	Mission Training Plan: Military History Detachment (Final Draft), February 1998.
CMH PAM	*Oral History Techniques and Procedures*
CMH PAM	"Organizational History"
FM 100–5	*Operations*
FM 101–5	*Staff Organization and Operations*

RELATED PUBLICATIONS

A related publication is a source of additional information.

AR 5–3	*Installation Management and Organization*
AR 11–33	*Army Lessons Learned Program: System Development and Application*
AR 15–1	*Committee Management*
AR 25–1	*The Army Information Resource Management Program*
AR 25–55	*The Department of the Army Freedom of Information Program*
AR 40–226	*Annual Historian Report – AMEDD Activities (RCS MED–41)*
AR 190–11	*Physical Security of Arms, Ammunition,and Explosives*
AR 190–18	*Physical Security of U.S. Army Museums*
AR 215–1	*Administration of Morale, Welfare, and Recreation and Nonappropriated Fund Instrumentalities*
AR 215–2	*Nonappropriated Fund Accounting Policy and Reporting Procedures*
AR 380–5	*Department of the Army Information Security Program*
AR 381–26	*Army Foreign Material Exploitation Program*
AR 600–82	*The U.S. Army Regimental System*
AR 608–4	*Control and Registration of War Trophies and War Trophy Firearms*
AR 611–101	*Personnel Selection and Classification: Commissioned Officer Specialty Classification System*
AR 670–1	*Wear and Appearance of Army Uniforms and Insignia*
AR 700–99	*Acquisition,Accounting,Control,and Disposal ofCaptured Enemy Equipment and Foreign Material*
CJCS Manual 3500.04B	*Universal Joint Task List*
CJCS Instruction 5320.01	*Guidance for the Joint History Program*
CMH Pub 105–2	*Publications of the U.S. Army Center of Military History*. (Copies may be obtained from CMH, ATTN: DAMH-PS, Building 35, 103 Third Avenue, Fort McNair, DC 20319–5058.)

Combined Arms Training Activity, *Common Collective Tasks* (Ft Leavenworth: GPO, 1989).

DA PAM 25–30	*Consolidated Index of Army Publications and Blank Forms*
DA PAM 870–2	*The Military Historian in the Field* (obsolete, but good reference)
DOD 5040.4	*Joint Combat Camera (COMCAM) Operations*
DOD 5200.1–R	*Information Security Program Regulation*
FM 71–100	*Division Operations*
FM 100–6	*Information Operations*
FM 100–14	*Risk Management*
FM 100–15	*Corps Operations*
FM 100–17	*Mobilization,Deployment, Redeployment,and Demobilization*
FM 100–17–3	*Reception, Staging, Onward Movement, and Integration*
FM 100–20	*Military Operations in Low Intensity Conflict*
FM 100–23	*Peace Operations*
FM 101–5–1	*Operation Terms & Graphics*
NGR 10–1	*Organization and Federal Recognition of Army National Guard Units*
10 USC 1588	*United States Code*
RCS CSHIS–6(4)	Annual History
RCS CSHIS –9(1)	Historians Activities Report
RCS CSHIS –11	Command Report
STP 21–1–SMCT	Soldiers Manual of Common Tasks, Skill Level 1.
STP 21–24–SMCT	Soldiers Manual of Common Tasks, Skill Level 2–4.
STP 21–11–SMQS	Military Qualification Standards II Manual of Common Tasks for Lieutenants and Captains
TC 25–20	A Leader's Guide to After-Action Reviews

U.S. ARMY CENTER OF MILITARY HISTORY PUBLICATIONS

Center of Military History. "Organizational History" (Washington, D.C.,1986).

Everett, Stephen E. *Oral History Techniques and Procedures* (Washington, D.C., 1992).

Jessup, John E. and Robert W. Coakley. *A Guide to the Study and Use of Military History* (Washington, D.C., 1982). CMH Pub 70–3.

Matloff, Maurice, ed. *American Military History* (Washington, D.C., 1985; rev. ed., 1989). CMH Pub 30–1–1.

Robertson, William G. *The Staff Ride* (Washington, D.C., 1987). CMH Pub 70–21.

PRESCRIBED FORMS

DA Form 2609	Historical Property Catalog
DA Form 7273–R	Access Agreement for Oral History Material

REFERENCED FORMS

DA Form 4569	USAPC Requisition Code Sheet
DA Form 5572–R	Proffer of Gift Agreement
DA Form 5573–R	Loan Agreement

PHOTOGRAPH LOG

ROLL # _____ UNIT/PHOTOGRAPHER _____

PHOTO#	*DATE TIME GRP*	*LOCATION*	*REFERENCE#*	*CAPTION*

Annex 2

DOCUMENT LOG

LOG # _____

DOCUMENT #	*DATE*	*DESCRIPTION*

HISTORICAL PROPERTY LOG

LOG # _____

ARTIFACT #	*DATE OF ACQUISITION*	*DESCRIPTION*	*DISPOSITION*

INTERVIEW LOG

LOG # _____

INTERVIEW #	*NAME OF INTERVIEWEE*	*DUTY POSITION*	*INTERVIEWER*	*PHOTO #*

RECORDS TRANSMITTAL AND RECEIPT

Complete and send original and two copies of this form to the appropriate Federal Records Center for approval prior to shipment of records. See specific instructions on reverse.

PAGE	OF
1	PAGES

1. TO *(Complete the address for the records center serving your area as shown in 36 CFR 1228.150)*

Federal Records Center

5. FROM *(Enter the name and complete mailing address of the office retiring the records. The signed receipt of this form will be sent to this address)*

2. AGENCY TRANSFER AUTHORIZATION	TRANSFERRING AGENCY OFFICIAL *(Signature and title)*	DATE
3. AGENCY CONTACT	TRANSFERRING AGENCY LIAISON OFFICIAL *(Name, office and telephone No.)*	
4. RECORDS CENTER RECEIPT	RECORDS RECEIVED BY *(Signature and title)*	DATE

Fold Line

6. RECORDS DATA

ACCESSION NUMBER			VOLUME *(cu. ft.)*	AGENCY BOX NUMBERS	SERIES DESCRIPTION *(With inclusive dates of records)*	RESTRICTION	DISPOSAL AUTHORITY *(Schedule and item number)*	DISPOSAL DATE	COMPLETED BY RECORDS CENTER			
RG	FY	NUMBER							LOCATION	SHELF PLAN	CONT. TYPE	AUTO. DISP.
(a)	*(b)*	*(c)*	*(d)*	*(e)*	*(f)*	*(g)*	*(h)*	*(i)*	*(j)*	*(k)*	*(l)*	*(m)*

Standard Form 135 (Rev. 7-85)
Prescribed by NARA
36 CFR 1228.152
USAPPC V1.10

INSTRUCTIONS FOR COMPLETION OF STANDARD FORM 135

FOR COMPLETION BY THE TRANSFERRING AGENCY

Items 1, 2, 3 and 5 are self-explanatory. Specific instructions for item 6 are as follows:

Col.

Accession Number. A separate accession number is required for each series of records listed on the form. A series consists of records having the same disposal authority and disposal date that are transferred together to the records center. The accession number is entered in three parts, consisting of:

(a) The NARA record group number assigned to the records of the agency making the transfer;

(b) The last two digits of the current fiscal year; and

(c) A four digit sequential number obtained in advance from the records center. (Arrangements may be made with the center to have these numbers assigned by the agency records officer or other official.)

(d) *Volume.* Enter the volume in cubic feet of each series of records being transferred.

(e) *Agency Box Numbers.* Show the inclusive box numbers for each series of records being transferred. The agency shall number each carton sequentially as follows: 1 of 25, 2 of 25, 3 of 25, etc. (Each new series of records should begin with carton number 1.) To facilitate control of the records and future reference service, the agency also shall mark each container with the assigned accession number prior to shipment.

(f) *Series Description.* Describe the records in sufficient detail to allow the records center to check for proper application of the disposal schedule. Inclusive dates of the records should be indicated. Show the organizational component that created the records when it is other than that shown in item 5.

(g) *Restriction.* Enter one of the following codes to show a restriction on use of the records. Restrictions other than (or in addition to) security classifications, such as limiting access to certain agency officials, are to be specified by a statement in the Series Description column (f).

Code	*Restrictions*
Q	Q security classification
T	Top Secret security classification
S	Secret security classification
C	Confidential security classification
R	Restricted use-witnessed disposal not required (specify in column (f))
W	Restricted use-witnessed disposal required (specify in colum (f))
N	No restrictions

(h) *Disposal Authority.* For each series of records, cite the agency schedule and specific item number authorizing disposal. Cite the NARA disposal job and item number if it has not been incorporated into an updated agency schedule.

(i) *Disposal Date.* Applying the disposal authority previously cited in column (h), enter the month and year in which the records may be destroyed.

FOR COMPLETION BY THE RECORDS CENTER

Item 4 is self-explanatory. Specific instructions for item 6 are as follows:
Col.

(j) *Location.* The records center annotates the shelf location of the first carton for each series of records.

(k) *Shelving Plan.* The records center enters the appropriate code from Chap. 7-10e, HB, Records Center Operations (NAR P 1864.1A), to reflect the shelving system.

(l) *Container Type.* The records center enters the appropriate code from Chap. 7-10h, NAR P 1864.1A, to reflect the type of container in which the records are retired.

(m) *Automatic Disposal.* The records center enters either *Y* (yes) to indicate automatic disposal applies or *N* (no) indicating that the agency wishes to receive disposal concurrence notice prior to destruction of the records. Automatic disposal is applied only when previously agreed upon by the agency.

Use Standard Form 135-A, Records Transmittal and Receipt Continuation, when additional space is required for listing records data.

HOMETOWN NEWS RELEASE INFORMATION

1. PAO CODE	PRINT OR TYPE - SEND ORIGINAL ONLY	FOR RELEASING PUBLIC AFFAIRS OFFICE USE ONLY

2. YOUR SOCIAL SECURITY NUMBER *(For identification only)*

PRIVACY ACT STATEMENT

AUTHORITY: 5 U.S.C. 301, 10 U.S.C. 8012 and 8034, and EO 9397.
PRINCIPAL PURPOSE: To prepare news stories and news releases for distribution and publication by civilian news media to recognize the achievements of Army and Air Force members. In accordance with the 1974 Privacy Act, you are hereby informed that your Social Security Number on this form is required for identification use only.
ROUTINE USE: Information may be disclosed to civilian news media representatives. Once published, information is considered "Public Domain."
DISCLOSURE : Information collected on this form is released over your signature and is voluntary. If you have no objection to the information being released to hometown audiences, sign your name below. Failure to provide the information may mean little or no public news release material can be produced, thus denying the individual public recognition for personal achievements.

3. BRANCH OF SERVICE	4. STATUS	5. RANK	6. PAY GRADE	7. FIRST NAME, MIDDLE INITIAL, LAST NAME	8. SEX
☐ ARMY	☐ ACTIVE				
☐ AIR FORCE	☐ RESERVE	9. EVENT *(Example: Arrival; Promoted to Sergeant; Received Commendation Medal, etc.- Citation Needed)*			
☐ NAVY	☐ NATIONAL GUARD				
☐ MARINE CORPS					
☐ COAST GUARD	☐ CIVILIAN				

10. YOUR LIVING PARENTS, STEPPARENTS, GUARDIANS, AUNT/UNCLE/GRANDPARENTS OR ADULT SIBLINGS

a.(1) FIRST NAME, MIDDLE INITIAL, LAST NAME	(2) RELATIONSHIP TO YOU		
(3) ADDRESS *(Number and Street)*	(4) CITY	(5) STATE	(6) ZIP CODE
b.(1) FIRST NAME, MIDDLE INITIAL, LAST NAME	(2) RELATIONSHIP TO YOU		
(3) ADDRESS *(Number and Street)*	(4) CITY	(5) STATE	(6) ZIP CODE

11. SPOUSE'S NAME *(First, Middle Initial, Last)*

12. SPOUSE'S LIVING FATHER a. FIRST NAME, MIDDLE INITIAL, LAST NAME			
b. ADDRESS *(Number and Street)*	c. CITY	d. STATE	e. ZIP CODE
13. SPOUSE'S LIVING MOTHER a. FIRST NAME, MIDDLE INITIAL, LAST NAME			
b. ADDRESS *(Number and Street)*	c. CITY	d. STATE	e. ZIP CODE

14.a. YOUR PRESENT UNIT OF ASSIGNMENT *(Do not abbreviate)*	b. POST OR BASE *(Not APO)*	c. CITY	d. STATE OR COUNTRY

15. DUTY MOS OR AFSC	16. PRESENT JOB TITLE *(Full Title - Do not abbreviate)*	17. TOTAL YEARS MILITARY SERVICE

18.a. HIGH SCHOOL GRADUATED FROM	b. YEAR GRADUATED	c. CITY	d. STATE	e. ZIP CODE

19. COLLEGES GRADUATED FROM

a. COMPLETE NAME	b. DEGREE	c. YEAR GRADUATED	d. CITY	e. STATE	f. ZIP CODE

20. REMARKS *(Continue on back if necessary)*

21. SIGNATURE OF PERSON LISTED ABOVE *(Authorizing release of this information)*	22. DATE *(YYMMDD)*	23. DUTY PHONE *(DSN or area code)*

HISTORICAL PROPERTY CATALOG

For use of this form, see AR 870-5 and AR 870-20; the proponent agency is the Office of the Chief of Military History.

CATALOG NUMBER	NAME OR TYPE OF ITEM	
ACCESSION NO DATE		
SOURCE OF ACQUISITION	DATE OF ACQUISITION	TITLE VESTED WITH
NAME AND ADDRESS OF DONOR *(Include ZIP Code)*	CONDITIONS OF DONATION	
LOCATION	MATERIAL	COLOR
SIZE *(Length, Width, Height)*	WEIGHT	COUNTRY OR ORIGIN
PERIOD OR DATE OF MANUFACTURE	ARTIST OR MAKER	LOCATION - SIGNATURE OR MAKERS MARK
PHYSICAL DESCRIPTION		
PHYSICAL CONDITION	MONETARY VALUE	PHOTO NEGATIVE NUMBER
HISTORY AND SIGNIFICANCE		

DA FORM 2609, OCT 62 USAPPC V1.00

LOANED TO OR BORROWED FROM	CATALOG NUMBERS OF RELATED ITEMS
REMARKS	DATES OF MAINTENANCE INSPECTIONS

USAPPC V1.00

ACCESS AGREEMENT FOR ORAL HISTORY MATERIALS

For use of this form see AR 870-5; the proponent agency is U.S. Army Center of Military History

FROM	TO *(Include title of agency head)*

1. I, _____ participated in an oral history conducted by

_____ of the
(Name of interviewer)

_____
(Name of agency)

on the following date*(s)* : _____ .

2. I understand that the tape*(s)* and the transcript resulting from this oral history will belong to the U.S. Government to be used in any manner deemed in the best interests of the U.S. Army, as determined by the Chief of Military History or his representative. I also understand that subject to security classification restrictions I will be given an opportunity to edit the resulting transcript in order to clarify and expand my original thoughts. The Army will provide me with a copy of the edited transcript for my own use subject to classification restrictions.

3. I hereby expressly and voluntarily relinquish all rights and interests in the tape*(s)* and transcript to the U.S. Army with only the following caveat: *(Please initial one)*

_____ NONE _____ OTHER _____

_____

I understand that the tapes and transcripts resulting from this oral history may be subject to the Freedom of Information Act, and therefore, may be releasable to the public contrary to my wishes. I further understand that, within the limits of the law, the U.S. Army will attempt to honor the restrictions I have requested to be placed on these materials.

NAME OF INTERVIEWEE	DATE
ACCEPTED ON BEHALF OF THE U.S. ARMY BY	DATE

OPERATION _____ INTERVIEW FIELD NOTES

Interview Catalog Number: _____ Interviewee(s) _____

Duty Position: _____ Unit: _____

Date/Time of Interview: _____ Place of Interview (Bldg/Location) _____

Interviewer(s): _____ MHD _____ Operation / Phase_____

Important subjects discussed in interview:

1) _____

2) _____

3) _____

4) _____

5) _____

6) _____

7) _____

8) _____

Ask Interviewee to recommend people to interview

_____

What needs a follow-up? _____

_____

Interview Assessment and Commentary _____

_____

_____

Number of Tapes _____ both sides: *Y / N,* Audio Quality*: poor / fair / good*

Unclassified / Confidential / Secret / Top Secret Priority of Transcript *1 2 3 4 5*
High Low

Photo taken: *yes / no* Photo log # _____ other recording format (video): *none / other*

Documents collected: *message traffic-logs / correspondence / maps / overlays / briefing slides / ops logs / staff journals / weather reports / key personnel rosters / intel reports / computer discs / videos / photos*

Contact Address: _____

_____

Telephone: (H)_____(W)_____

CASSETTE CASE COVER

SUBJECT PHOTO

_____
Military History Detachment
_____

Date:_____
Name:_____
Rank:_____
Duty Position:_____
Unit:_____
Location:_____
Interviewer:_____

CATALOG NUMBER_____

_____
MILITARY HISTORY DETACHMENT

PHOTOGRAPHY SLATE

_____Military History Detachment

OPERATION:

PHOTOGRAPHER:

ROLL#

Date Started:

By Order of the Secretary of the Army:

ERIC K. SHINSEKI
General, United States Army
Chief of Staff

Official:

JOEL B. HUDSON
Administrative Assistant to the
Secretary of the Army

DISTRIBUTION:

To be distributed in accordance with Special Distribution requirements for FM 1–20.