

U.S. Department of  
Homeland Security

United States  
Coast Guard



# Tactics, Techniques, and Procedures (TTP) Development System and Standards



Force Readiness Command  
(FORCECOM)

CGTTP 1-01B  
August 2013

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U.S. Department of  
Homeland Security

United States  
Coast Guard



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## COAST GUARD TACTICS, TECHNIQUES, AND PROCEDURES 1-01B

Subj: TACTICS, TECHNIQUES, AND PROCEDURES (TTP) DEVELOPMENT SYSTEM AND STANDARDS

Ref: (a) The Modernization Effort Roles and Responsibilities Work Group Memo of April 2009  
(b) The Coast Guard Directives System, COMDTINST M5215.6 (series)  
(c) COMDT COGARD Washington DC //CG-092// 241735Z SEP 08/ALCOAST 458/08, COMDTNOTE 5700 Subj: Social Media – Official Internet Posts  
(d) The Coast Guard Correspondence Manual, COMDTINST M5216.4 (series)  
(e) Classified Information Management Program, COMDTINST M5510.23 (series)

1. PURPOSE. To provide the tactics, techniques, and procedures (TTP) for developing and publishing TTP publications.
2. ACTION. This revised publication applies to all personnel involved in developing or revising Coast Guard TTP publications.
3. DIRECTIVES/TTP AFFECTED. This revision replaces Tactics, Techniques, and Procedures (TTP) Development System and Standards, CGTTP 1-01A.
4. DISCUSSION. This publication describes the processes and procedures for creating new TTP publications, or revising existing TTP publications using the coordinated approval process. It describes the TTP development cycle, from identifying TTP requirements through release of a new or revised TTP publication.
5. PROCEDURE. Force Readiness Command (FORCECOM) TTP Division (FC-P) will not distribute this publication in printed form, but will post an electronic version of this CGTTP publication in the CGTTP library on CGPortal. To access the TTP library, go to CG Portal, click the “References” tab, then, in the left navigation pane, click “Tactics, Techniques, and Procedures.”
6. REQUEST FOR CHANGES. Send recommendations for changes or improvements by e-mail to:

[FORCECOM-PSST@uscg.mil](mailto:FORCECOM-PSST@uscg.mil)

Info COMCOGARD FORCECOM NORFOLK VA//FC-P// on message traffic containing lessons learned applicable to this publication.

7. RECORDS MANAGEMENT CONSIDERATIONS. This publication was thoroughly reviewed during the TTP coordinated approval process. It was determined there are no further records scheduling requirements in accordance with Federal Records Act, 44 U.S.C. 3101 et seq., NARA requirements, and Information and Life Cycle Management Manual, COMDTINST M5212.12 (series). This publication does not have any significant or substantial change to existing records management requirements.
8. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS. Environmental considerations under the National Environmental Policy Act (NEPA) were examined during this publication's development and are determined to be not applicable.
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# Chapter 1: Introduction

## **Introduction**

This chapter introduces the tactics, techniques, and procedures (TTP) division (FC-P), and defines notes, cautions, and warnings, as used in Coast Guard publications.

## **In This Chapter**

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This chapter contains the following sections:

<b>Section</b>	<b>Title</b>	<b>Page</b>
A	Introduction	1-2
B	Notes, Cautions, and Warnings	1-4

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## Section A: Introduction

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### **A.1. Introduction**

Since February 2009, the Coast Guard has extensively studied USCG publications to determine their doctrine, policy, and tactics, techniques, and procedures (TTP) content. Those detailed investigations revealed an extraordinarily complex interdependency among these types of information, as well as the need for processes to more quickly and efficiently review, update, and disseminate TTP to people in the field. As a result, the USCG established the Force Readiness Command (FC) TTP Division (FC-P).

FC's mission is to prepare the workforce by linking together policy, doctrine, TTP, training, assessment, and feedback in a fully aligned human performance system. Through a detailed benchmarking of other service's TTP and doctrine development processes, FC-P found that the most efficient system is a collaborative environment in which various Coast Guard entities share decisions, and work toward the common goal of producing current, useable, valid, and accessible TTP.

FC-P's roles and responsibilities:

- Conduct thorough studies and assessments (e.g., concurrent clearance/characterization requests, lessons learned, TTP life cycles, etc.) to ascertain USCG knowledge and information needs;
- Manage the TTP development system and standards;
- Partner with headquarters program offices, Training Centers (TRACENs), National Centers of Excellence (NCOEs), etc. in TTP development;
- Facilitate development, promulgation, and access of operational and mission support TTP;
- Monitor the progress of TTP projects and ensure developmental they achieve milestones;
- Coordinate consistency among doctrine, policy, and TTP; and
- Use a review board process to address Coast Guard TTP needs.

### **A.2. Scope of this Publication**

This publication describes a modernized method for initiating and developing operational and mission support TTP publications using the coordinated approval process. FC-P uses an integrated process team (IPT) model comparable to those used by the U.S. Navy and Marine Corps. The IPT model uses teams of stakeholders and subject matter experts (SMEs) who collectively and efficiently author and approve a TTP publication's content.

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**A.3. Revising  
this  
Publication**

The guidance in this publication is both flexible and adaptable enough to meet anticipated documentation needs. FC will regularly update this publication to ensure it remains current and relevant.

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## Section B: Notes, Cautions, and Warnings

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**B.1. Overview**      The following definitions apply to Notes, Cautions, and Warnings found in all CGTTP publications:

**NOTE:**      **An emphasized statement, procedure, or technique.**

**CAUTION:**      **A procedure, technique, or action that, if not followed, carries the risk of equipment damage.**

**WARNING:**      *A procedure, technique, or action that, if not followed, carries the risk of injury or loss of life.*

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## Chapter 2: Coast Guard Publication Overview

**Introduction** This chapter discusses the various types of USCG publications and other service's publications.

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**In This Chapter** This chapter contains the following sections:

<b>Section</b>	<b>Title</b>	<b>Page</b>
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C	Other Service Publications	2-8

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## Section A: Coast Guard Publications

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### A.1. Hierarchy of Coast Guard Publications and Organizational Knowledge

Figure 2-1 illustrates the hierarchy of Coast Guard publications and “ownership” of the processes to develop each category (e.g., doctrine, policy, and TTP). The higher in the pyramid, the more general the organizational knowledge is; lower items are more specific. Regardless of type, publications usually contain combinations of doctrine, policy, TTP, and facts.

The figure below shows the USCG entities with ownership over developing each information category. Oversight consists of:

1. Developing formatting and writing standards, and assisting with authors’ compliance with those standards;
2. Establishing and managing the process used by authors and reviewers; and
3. Maintaining the library and associated index/status tools.

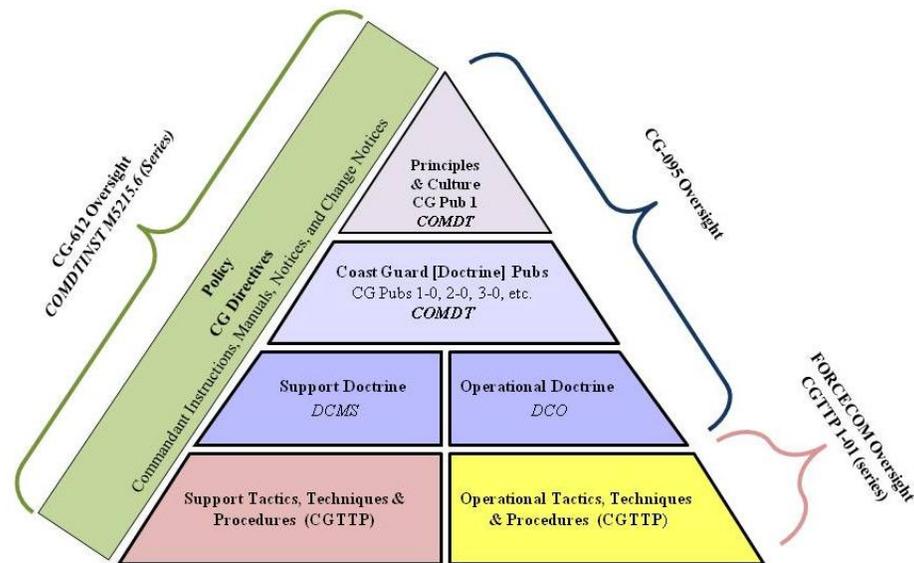


Figure 2-1 USCG publications categories and development process ownership

### A.2. Policy and Directives

Reference (a) The USCG Modernization Effort Roles & Responsibilities Work Group Memo of April 2009 defines policy as “*Restrictive or prescriptive direction, issued by an accountable person in authority, to accomplish a planned outcome.*”

The Department of Defense (DOD) Dictionary of Military and Associated Terms, Joint Publication 1-02, defines a “directive” as, “*a military communication in which policy is established or a specific action is ordered, a plan issued with a view to putting it into effect when so directed, or in the event that a stated contingency arises, and broadly speaking, any communication which initiates or governs action, conduct, or procedure.*”

Publications establishing policy are directives, and Commandant (CG-612), Directives and Publications division, is the control point for all directives.

Per reference (b) The Coast Guard Directives System, COMDTINST M5215.6 (series), a directive must be issued when an official document includes any of the following:

- Establishes policy.
- Establishes or changes organizational structure.
- Delegates authority.
- Assigns responsibility.
- Establishes a form or report.
- Revises, supplements, or cancels a directive.

A.2.a. Types of Directives

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Reference (b) The Coast Guard Directives System, COMDTINST M5215.6 (series), defines the types of directives as:

- Transmittal instructions.
- Instructions.
- Notices.
- Directive change notices.
- Manuals.
- Commandant publications.
- Message-type directives (ALCOASTs).
- Operation orders.
- Punitive general orders or regulations.
- Classified directives.

NOTE:

**While reference (b), The Coast Guard Directives System, COMDTINST M5215.6 (series) defines the standards for the types of directives listed above, this publication sets the standards for developing TTP publications.**

A.2.b. Statutory and Regulatory Guidance

The statutory and regulatory guidance for the directives system is:

- 14 U.S.C. Chapter 17, Sec. 632. Functions and Powers vested in the Commandant and 33 CFR Chapter 1, Part 1, Sec. 1.05-1 Delegation of Rulemaking Authority are the basic authorities for issuing rules, orders, and instructions.

- 44 U.S.C. 2902. This section states that “accurate and complete documentation of the policies and transactions of the Federal Government” is a records management goal in federal agencies.

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**A.3. Doctrine and TTP**

The following sections discuss doctrine and TTP (as types of organizational knowledge) and publications that focus on doctrine and TTP.

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**A.3.a. Principles & Culture**

USCG Publication 1, “U.S. Coast Guard: America’s Maritime Guardian,” (commonly referred to as Pub 1) is the Coast Guard’s only principles and culture publication. It describes fundamental Coast Guard roles and forces, and is consistent with Joint Publication 1 (JP 1), the capstone doctrine for unified action by the United States Armed Forces. It also aligns with Naval Doctrine Publication 1 (NDP 1). Pub 1 discusses fundamental concepts guiding the Coast Guard’s actions in support of national objectives.

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**A.3.b. Doctrine**

Reference (a), The Modernization Effort Roles and Responsibilities Work Group Memo of April 2009, defines doctrine as “*Fundamental principles and officially sanctioned beliefs which guide the Coast Guard in support of national objectives. Doctrine is authoritative but not directive, requires judgment in application, and provides decision makers and personnel a standard frame of reference.*”

Doctrine represents the USCG’s fundamental approach to a given staff function, mission area, or support activity.

The following sections describe the types of USCG doctrine publications.

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**A.3.b.(1). Organizational Doctrine**

Publications that impart organizational doctrine are organizational doctrine publications. The USCG’s organizational doctrine publications, the “tack zero” series – USCG Pub 1-0, USCG Pub 2-0, etc. – present the USCG’s approach to each headquarters staff function.

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**A.3.b.(2). Operational Doctrine**

Operational doctrine publications give guidance on developing and performing mission execution processes and meeting operational standards. They provide operational guidance for subordinate commanders to follow in carrying out USCG missions.

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**A.3.b.(3). Mission Support Doctrine**

Mission support doctrine publications give guidance on developing and performing mission support activities, delivering required capabilities, and meeting support resource needs and priorities. They guide delivery of full life cycle support to USCG forces that enables and sustains mission execution.

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**A.3.c. Tactics, Techniques, and Procedures (TTP)**

USCG TTP instructs and guides users in the correct task performance described by doctrine or prescribed by policy.

TTP publications provide readers tactics, and/or the approved techniques and/or procedural information needed to effectively and efficiently carry out procedure-based tasks, and operate specific platforms and systems.

Though not the content authority for the subject TTP guidance, FORCECOM TTP Division (FC-P) owns the processes to develop mission support and operational TTP publications.

FC's promulgation of TTP indicates that publication's development followed the approved processes described in this publication.

**A.3.d. Coast  
Guard Interim  
Publications  
(CGIPs)**

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CGIPs are quickly developed and released to address an emergent need. They generally use a shorter coordinated approval development process, but eventually become a CGTTP via the full coordinated approval process.

CGIPs still require over-arching policy, which can come from ALCOASTs or other guidance messages that are faster for CGHQ to draft and release than a Commandant instruction or manual.

An example CGIP is "Protester Recovery in the Water (PRIW) Operations," which FC quickly developed and released to give guidance and reference material supporting an emergent operational requirement. FC Commander signs CGIPs.

**A.4.  
Development  
and Approval  
Process for TTP  
Publications**

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FC recognizes the importance of having a development and approval process that includes inputs, opinions, and shared decision-making by all relevant "stakeholders" (e.g., Coast Guard entities with a direct interest in a publication's content).

After studying other TTP development systems and methods, FC-P concludes that the most efficient TTP development process is:

- Standardized: with clear, uniform, and easily implementable processes and publication standards.
- Fully transparent: allows for review and input by all interested parties.
- Focused on driving the collaboration level down as close to the field as possible.
- Designed for final approval at the O-6 level: the FORCECOM Functional Statements of April 2012 authorizes the FORCECOM Commander (FC-C) to delegate signature authority down to COs of FORCECOM and/or Deputy Commandant for Mission Support (DCMS) units (referred to later as delegated signature authority(ies)).

The coordinated approval process meets the above criteria. In coordinated approval, integrated process team (IPT) members collaborate on a TTP publication's content, agreeing with, or "approving" content as it as they develop it.

When all major development work is complete, IPT principal members vote on the coordinated draft. If they approve, the TTP has "coordinated approval."

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## Section B: CGTTP Numbering System

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### B.1. CGTTP Numbering System

FC's System & Standards team (FC-Psst) assigns publication numbers to USCG TTP publications using the following conventions:

**NOTE:**

**CGTTP numbering generally aligns with the Navy's NTTP numbering, not the USCG numbering system used for directives.**

B.1.a. Series

All TTP publications have a series number. The first numerical group identifies the major category (e.g., general administration, intelligence, operations, etc.).

B.1.b. Primary Functional Field

All TTP publications have a primary functional field number. The second numerical group (after a hyphen), places the TTP publication within a functional field (e.g., leadership, intelligence support, drug and migrant interdiction, etc.). The primary functional fields come from the numbers assigned joint publications in the same functional mission areas. Where there is no associated joint TTP number for a given Naval tactical area, FC issues a non-conflicting number.

B.1.c. Primary Topic

Primary topic applies to all TTP publications. The topic of the primary functional field.

B.1.d. Secondary Functional Field

Only select TTP publications have a secondary functional field number. Following a hyphen, places the TTP publication within a secondary functional field.

B.1.e. Secondary Topic

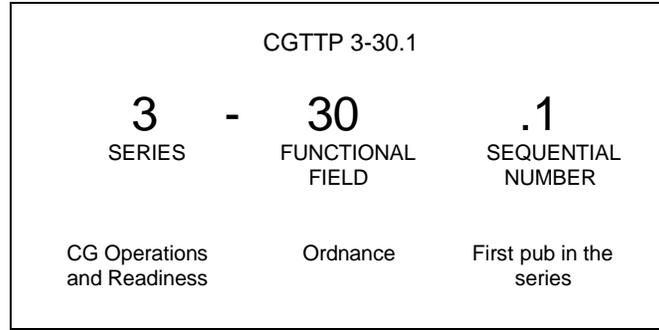
Secondary topic applies to all TTP publications. The topic of the secondary functional field.

B.1.f. Sequential Identifier

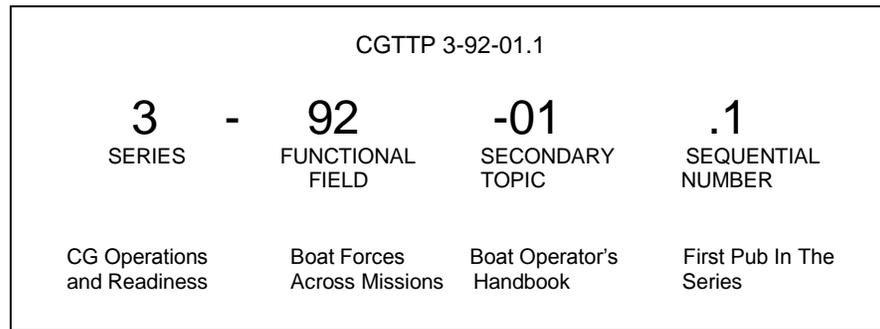
All TTP publications have a sequential identifier. The final numerical group after the decimal is simply a sequential number. Table 2-1 on page 2-7 shows the various identifying numbers associated with TTP publications.

Figure 2-2 on page 2-7 shows the numbering scheme for a typical USCG TTP publication (in this instance, Ordnance TTP, CGTTP 3-30.1)

Figure 2-3 on page 2-7 shows a TTP publication (the Boat Operator's Handbook) requiring a deeper numbering scheme.



**Figure 2-2 Example numbering scheme for a typical TTP publication**



**Figure 2-3 Example expanded numbering scheme for a TTP publication**

Series	Primary Functional Field	Primary Topic	Secondary Functional Field	Secondary Topic	Sequential Number	Example
All TTP pub numbers	All TTP pub numbers	All TTP pub numbers	Select TTP pub numbers	Select TTP pubs	All TTP pub numbers	
3	-92	Boat Forces Across Missions	-01	Boat Operator's Handbook	.1, .2, etc.	3-92.1 3-92-01.1
3	-95	Deployable Specialized Forces Across Missions	N/A	N/A	.1, .2, etc.	3-95.1 3-95.2

**Table 2-1 TTP publication numbering criteria**

See Appendix D for the complete list of series, functional fields, and areas.

## Section C: Other Service Publications

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### C.1. Overview

This section gives an overview of the similarities, and/or interaction between, Coast Guard publications and those of other services.

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### C.2. Joint Publications (JP)

The Chairman of the Joint Chiefs of Staff (CJCS), in consultation with the other members of the Joint Chiefs of Staff and combatant commanders, issues JPs to describe doctrine and TTP for employing U.S. Armed Forces in joint operations. Per Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 5120.02B, combatant commands, Joint Staff directorates, and Service headquarters (including the Coast Guard) provide needed staff and resources to perform doctrinal responsibilities.

Joint publications govern joint operations. Joint doctrine and TTP are prepared under the direction of the Chairman of the Joint Chiefs of Staff and promulgated as JPs. JPs establish doctrine and TTP to govern joint activities and performance of the United States Armed Forces in joint operations. It also serves as the doctrinal basis for interagency coordination and U.S. military involvement in multinational operations. JP guidance is authoritative; as such, readers must follow it except when in the judgment of the commander, exceptional circumstances dictate otherwise. If conflicts arise between the contents of JPs and service publications, JP guidance takes precedence joint forces activities unless the CJCS, normally in coordination with other members of the Joint Chiefs of Staff, has provided more current and specific guidance.

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### C.3. Multiservice Publications

Certain operations require doctrine or TTP that apply to two or more services, but do not require participation by all services, or CJCS ratification. JP 1-02 defines multiservice doctrine as “fundamental principles that guide the employment of forces of two or more services in coordinated action toward a common objective. It is ratified by two or more services and is promulgated by multiservice publications that identify the participating services (e.g., Army-Navy doctrine).”

FC posts all multiservice publications with doctrine and TTP used by Coast Guard forces in the CGTTP library (by publication or signed reference memo – see Figure 4-1 on page 4-2). When developed outside this TTP’s procedures, FC-P assigns a Coast Guard-unique CGTTP number to multiservice publications using the guidelines in paragraph B.1 (on page 2-6) and Appendix D.

When FC accepts for Coast Guard-wide use a publication produced by another service or multiservice organization (e.g., NTTTP) to promote efficiency, FC assigns a CGTTP/CGIP designation in addition to the document’s parent service designation (i.e., dual designation).

FC-P then adds the publication to the USCG's TTP library, where it serves as an information resource for conducting joint missions.

The parent service, with input from the Coast Guard, issues and maintains these other-service publications. FC acts as the Coast Guard's executive agent to coordinate U.S. Coast Guard input and distribution requirements with the parent service.

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#### **C.4. Air Land Sea Application Center**

The Air Land Sea Application (ALSA) Center is the primary developer of Multiservice TTP (MTTP). It is chartered by a Joint Memorandum of Agreement between the Army, Navy, Marine Corps, Air Force, and Coast Guard doctrine centers. ALSA represents all U.S. military services, as applicable, in doctrine and TTP development.

This publication does not cover ALSA Center procedures, but publications of USCG interest receive a USCG-unique CGTTP number using the guidelines in Section B: CGTTP Numbering System and Appendix D.

You can download MTTPs from the ALSA Restricted website at <http://www.alsa.mil> (valid CAC card required).

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#### **C.5. Allied Publications**

[Allied Publications \(APs\)](#) serve the same purpose as USCG doctrine for operating with North Atlantic Treaty Organization (NATO) forces. CGTTPs complement Allied publications in NATO operations. When national forces operate under NATO command, NATO doctrine guides their actions. If NATO lacks TTP for a specific task, national TTP suffices until promulgation of multinational TTP.

Commanders of forces operating as part of a multinational military command (alliance or coalition) should follow multinational doctrine and procedures ratified by the United States. For doctrine and procedures not ratified by the United States, commanders should evaluate and follow the multinational command's doctrine and procedures, where applicable and consistent with U.S. law, regulations, and doctrine.

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#### **C.6. Multinational Publications**

Multinational publications (MPs) are unclassified maritime operational and procedural publications that provide NATO and non-NATO nations' common doctrine and TTP on which to base their operations. These publications provide common TTP for operations and exercises with and between nontraditional partners, and are available to all nations through a NATO sponsor. Any U.S. command can release a multinational publication to a non-NATO nation. The sponsoring command immediately notifies the Naval Warfare Development Command (N5) of the release by message that includes the following information:

1. Non-NATO nation and unit/command.
2. Date of release.

3. Reason for release.
4. Media (hardcopy or electronic).

NOTE:

**Do not post MPs on freely accessible information or media facility. See reference (c) ALCOAST 458/08 for guidance.**

The Multinational Maritime Operations Manual (MMOP) is a collection of fundamental principles providing operational-level guidance to national and multinational maritime force commanders, their staffs, and to unit commanding officers on the planning and conduct of multinational maritime operations. It is the keystone publication for the MP series.

### C.7. Navy Publications

CGTTPs are equivalent in scope to Naval warfare publications (NWP), Navy technical reference publications (NTRPs), and Naval tactics, techniques, and procedures (NTTPs). They give tactical (field user) level guidance and instruction, usually in the form of specific, detailed information on using platforms and systems.

The USCG regularly works with the Navy on certain mission types, so a familiarity with their NTTPs – specifically the tactical aspects – is necessary.

- NWP, NTTPs, and NTRPs “contain validated doctrine and TTP for employing Naval forces.”
- Common tactical pictures (CTPs) are “unique, ship-specific types of NTRPs, and are single references for fighting that ship in assigned warfare areas.”
- Tactical memos (TACMEMOs) “allow operational commanders, development commands, warfare centers of excellence, and other cognizant authorities to develop and publish new TTP for use and validation by all.”
- Tactical Bulletins (TACBULs) are “emerging TTP that are either proven best practices waiting to be published in a doctrinal publication, or experimental tactics waiting to be developed into a TACMEMO for validation.”

The Navy’s Style Guide, COMSURFWARDEVGRUINST 5216.1J, gives guidance on writing and formatting NTTPs, NTRPs, CTPs, TACMEMOs, and TACBULs.

NTTPs are available for download from the Navy Doctrine Library System (NDLS) at <https://ndls.nwdc.navy.mil>.

## Chapter 3: Developing TTP

### Introduction

This chapter describes the concepts, participants, and process of developing TTP and TTP publications, from initial trigger to promulgation.

### In This Chapter

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This chapter contains the following sections:

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A	TTP Development Process Overview	3-2
B	TTP Development Entities	3-5
C	COMDTINST Characterization and Concurrent Clearance Review	3-12
D	Developing TTP	3-17

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## Section A: TTP Development Process Overview

### A.1. General

The process of revising existing, or creating a new TTP publication using the coordinated approval method involves multiple steps and stakeholders.

### A.2. TTP Development Triggers

The TTP development process begins with a “trigger” for FC-P to conduct TTP development or revision. The trigger could be a routine concurrent clearance review, TTP life cycle review, TTP request (from the FC-P Website), lesson analysis, an Operational Human Performance Advisory Council (OHPAC – see section B.2 on page 3-5) recommendation (to address an identified TTP deficiency, or gap), or direct contact with FC-P (via phone, e-mail, memorandum, etc.).

The type of trigger determines FC-P’s course of action.

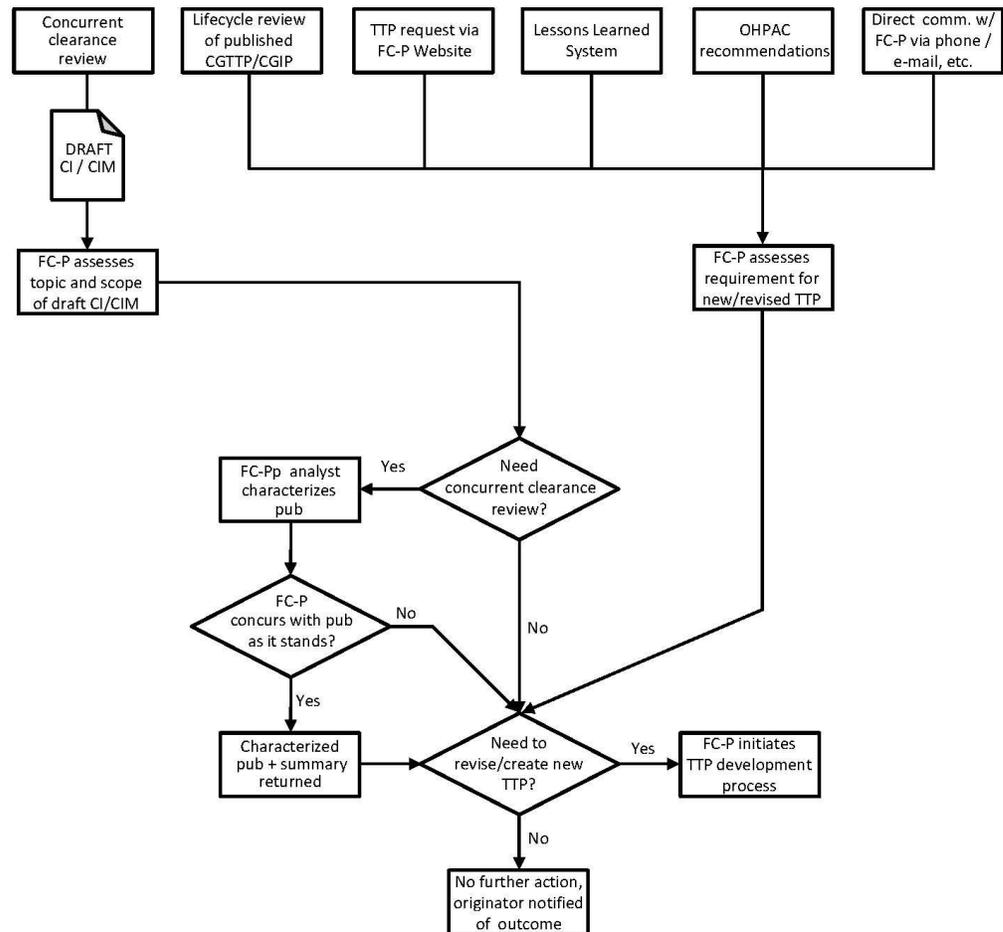
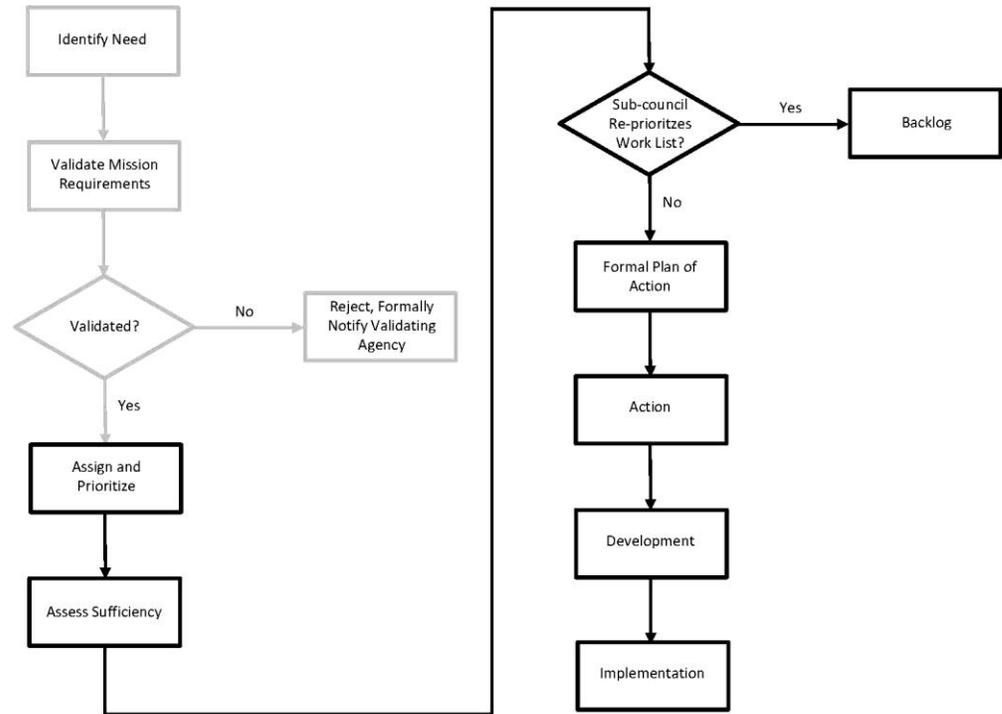


Figure 3-1 TTP development overview

**A.3.  
OHPAC’s Role  
in Prioritizing  
TTP**

The figure below represents the general flow of the OHPAC cycle, which includes prioritizing TTP projects (the light gray areas are outside of OHPAC). The process of validating the need for a new or revised TTP publication and prioritizing the TTP project is a multi-step process that directly involves the OHPAC work cycle:



**Figure 3-2 OHPAC cycle overview**

Figure 3-2 shows a simplified flow of OHPAC’s work cycle. The step-action table below lists the process OHPAC uses for prioritizing TTP projects, with detailed explanations in the sections that follow.

<b>Step</b>	<b>Action</b>
1	Identify the need
2	Validate mission requirements
3	Assign & prioritize, or reject
4	Assess sufficiency
5	Formal plan of action
6	Action
7	Action & development
8	Implementation

**A.4. “Emergent”  
Need TTP  
Development**

Occasionally, the need for a new or revised TTP arises from an incident in which there is injury/loss of life or equipment damage, and the new or revised TTP must get out to the field as quickly as possible.

An example is the recent “Shipmates 16” ALCOAST 465/11, which detailed the final action on an administrative investigation into the loss of a Coast Guardsman in October of 2011.

As a result, FC received tasking to quickly revise the procedures in CGTTP 3-95.1, “Hook and Climb (H&C) Tactics, Techniques, and Procedures.” FC-P selected an integrator to coordinate an operational test & evaluation (OT&E) that analyzed – in detail – at current hook and climb procedures to determine where the procedures failed to protect the crewmember.

The FC-P integrator worked closely with CG-731, program SMEs, and operators to execute the OT&E. After executing the OT&E and analyzing the results, several key areas (i.e., position of rescue boat, role of the advanced interdiction (AI) Coxswain, location of medical personnel, and expanded duties of the boat team leader (BTL)) were found to need changes. The OT&E also identified the need for additional updates to the overarching policy and doctrine related to the OT&E’s findings.

FC then revised the existing CGTTP to include all identified changes intended to prevent similar future incidents.

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## Section B: TTP Development Entities

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**B.1. General** Effective TTP publication development requires coordination with the most experienced people in a given field. Their knowledge and experience allow them to quickly review material in their field of expertise, submit authoritative content changes, and declare the information accurate, current, and approved for release. This collaboration is the basic premise of the coordinated approval process, in which a team of acknowledged subject matter experts (SMEs) convenes to quickly create new – or update existing – TTPs and get them into the field in the most expedient manner possible.

**B.2. Operational Human Performance Advisory Council (OHPAC)** The Operational Human Performance Advisory Council (OHPAC) includes an executive level guidance team (co-chaired by CG-7 and FC-C), a senior management integration team (which reports to the guidance team, and is co-chaired by the deputy assistant Commandant for capabilities (CG-7d) and the FORCECOM chief of staff (FC-Ccs)), and domain sub-councils co-chaired by O-6 capability managers from DCO, and peer-level FORCECOM human performance experts for DCMS. Each of the sub-councils includes SMEs representing the following mission areas:

- Aviation.
- Boats.
- Cutters.
- Sector missions.
- Specialized capabilities.

OHPAC advises and coordinates with DCO and DCMS on service platform and human performance issues regarding policy, requirements, doctrine, TTP, capabilities, capacities, competencies, assessment, and compliance.

For more information, see the OHPAC Charter Memorandum of July 2011.

**B.3. FORCECOM TTP Division (FC-P)** Headquartered in Norfolk, VA, FC “prepares the workforce by linking together policy, doctrine, and TTP development, training, assessment, and feedback into an aligned human performance system.” FC-P is a major component of the human performance cycle (HPC).

FC-P fills a gap in USCG knowledge by managing the TTP development process and paperwork, providing publishing expertise, ensuring TTP quality, and reducing development lead-time. Led by an O-6, FC-P’s staff includes a diverse mixture of USCG personnel, civilians, and contractors.

FC-P:

- Sets TTP requirements, and enables TTP development, approval, and promulgation.
- Manages TTP development to ensure each TTP project meets its milestones.
- Coordinates consistency among policy, doctrine, and TTP.
- Liaises with the pub’s content authority and other SMEs to validate TTP content.
- Delivers TTP using a shared review and decision-making process.
- Serves as signature authority for TTP, validating adherence to the TTP development process.
- Maintains the TTP revision process (normal and off-normal life cycles).
- Is the USCG’s knowledge manager and maintains the Coast Guard’s lexicon.

B.3.a. FC-P  
Branches

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FC-P comprises 3 separate branches (each led by a Coast Guard officer) located in Norfolk VA, and a team in Alameda, CA (also led by a Coast Guard officer):

- Publications branch (FC-Pp) – Norfolk.
- Integration branch (FC-Pi) – Norfolk.
- Lessons Learned branch (FC-PlI) – Norfolk.
- System and Standards team (FC-Psst) – Alameda.

The following sections describe the branches and their functions.

B.3.a.(1).  
Publications  
Branch (FC-Pp)

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The Publications branch staff includes civilian contractors with technical writing and performance analysis skills. The staff serves as authors, developmental editors, performance analysts and can supplement the USCG staff by acting as integrators on TTP projects.

FC-Pp staff members revise and edit existing TTP publications, and compile and format new TTP publications using specific, approved templates that ensure a consistent “look and feel” on all FC-P produced TTP publications.

B.3.a.(2).  
Integration  
Branch (FC-Pi)

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The Integration branch implements FC-P’s TTP development processes to align, policy, doctrine, and TTP to support operational and support mission sets and all cross-disciplinary capabilities.

FC-Pi integrators (see section B.4.a on page 3-8) facilitate the TTP development process. They form IPTs and oversee their progress, and are responsible for overseeing TTP development projects from start to finish.

The Integration branch also coordinates with the Lessons Learned and Publications branches to incorporate lessons learned and ensure timely publication of changes and updates to TTP.

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B.3.a.(3).  
Lessons Learned  
Branch (FC-PII)

The Lessons Learned branch “collects, analyzes, and disseminates information gained from operational missions, mission support experiences, exercises, and supporting activities.”

FC-PII:

- Liaises with TRACENs, IPTs, subject matter experts (SMEs) and others to assist with collecting and analyzing lessons learned, observations, contingency exercises, and best practices obtained from real world operations, training, and mission support activities.
- Collects/reviews lessons identified and/or learned, including exercise, training, operational after-action reports and root cause analyses.
- Analyzes inputs from all identified lessons learned systems; distributes actionable/validated results to appropriate FORCECOM stakeholders (and others as necessary) that might affect TTP, training curriculum, safety, etc.
- Identifies misalignments of policy, doctrine, TTP, and/or lessons learned.

FC-PII uses an internally-developed and maintained SharePoint collection and management tool called the “Consolidated Assessment and Lessons Identified Process for Evaluation and Reporting” (CALIPER) system as its main collection repository for lessons learned.

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B.3.a.(4).  
Systems and  
Standards Team  
(FC-Psst)

Based in Alameda, CA, SST acts as FC-P’s standards arm, setting and verifying standards compliance for all TTP publications. SST reports directly to the FC-P division chief.

The team:

- Develops and maintains the SharePoint collaboration system.
- Studies and tests new technology solutions for distributing TTP, and makes recommendations to FC-P for implementing new technologies.
- Develops and maintains CGTTP 1-01 (this publication), and the FC-P Style Guide to provide clear, consistent guidance on style issues (e.g., format, phrasing, numbering, etc.).
- Sets standards and provides the quality controls for all TTP publications.
- Produces and modifies TTP templates (cover and body) used by the publications branch, and provides technical support for template issues.
- Designates CGTTP numbers for all draft TTP publications (following the guidance in Appendix D of this manual).

- Conducts quality assurance / quality control (QA/QC) checks to ensure high quality TTP.
- Manages and oversees the SharePoint collaboration tool.
- Tracks all draft publications requiring FC-P concurrent clearance reviews.
- Manages and oversees the characterization effort (see COMDTINST Characterization and Concurrent Clearance Review on page 3-12).
- Liaises with CG-6 on electronic TTP publication.
- Liaises with GPO to establish specifications for printed TTP publications.
- Manages the Coast Guard’s TTP library.

**B.4. FC-P Staff Roles and Responsibilities**

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FC-P staff members most actively involved in a TTP development project are:

- FC-P division chief.
- Integrator.
- Developmental editor.
- SST QA editor.

The following sections describe the roles and responsibilities of the key participants in TTP development projects.

---

B.4.a. Integrator

FC-P (or an FC-P partner organization with delegated TTP publication development and signature authority) designates an integrator to facilitate the TTP development process. The integrator plans, schedules, and convenes meetings (in person, by phone conference, or video teleconference (VTC)) of principal and advisory IPT members to keep all members engaged and active during the revision process.

The integrator uses Microsoft SharePoint to track and manage the project, and collaborate with all IPT members.

---

B.4.a.(1).  
Integrator Roles and Responsibilities

The integrator (the listed “days in advance” are ideals, not hard requirements):

- Develops meeting agendas and coordinates with attendees at least 14 days before the meeting.
  - Leads content reviews, and interacts with SMEs to develop content.
  - Captures and distributes meeting minutes NLT 14 days after the meeting.
  - Assigns and tracks action items to completion.
  - Coordinates active participation from outside organizations (if required).
  - Reports all schedule, timeline, milestone, and/or risks to FC-P.
-

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B.4.b. Developmental Editor

The developmental editors work closely with the integrator and IPT members to develop TTP publications. The developmental editors edit and format all TTP publications using approved templates and per the standards set by the system and standards team (FC-Psst).

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B.4.b.(1). Developmental Editor Roles and Responsibilities

The developmental editor:

- Attends the initial alignment meeting with integrator and IPT members.
- Compiles information to incorporate into a draft TTP publication.
- Creates the draft TTP publication using an approved template.
- Works with integrators and IPT members to adjudicate review comments.
- Inputs all comments into draft TTP.

---

B.4.c. SST QA Editors

SST QA editors thorough review all draft TTP publications to ensure they comply with established standards. SST QA editors work closely with developmental editors to resolve template and/or formatting, terminology, and wording issues (passive to active voice, grammar, word use, etc.) that might arise during the QA edit.

---

B.4.c.(1). SST QA Editor Roles and Responsibilities

SST QA editors:

- Review all draft TTP publications for standards compliance.
- Coordinate with the developmental editor and integrator on wording and/or phrasing issues to ensure QA edits do not alter the intended meaning.
- Put the final “polish” on draft TTPs before they go for signature (by FC-P or authorized signer) and promulgation.

---

**B.5. Integrated Process Teams (IPTs)**

Because SME experience exists throughout the Coast Guard, FC-P’s TTP development process (i.e., coordinated approval) uses a cross-disciplinary team of stakeholders and SMEs from various specialties, geographic locations, and diverse job skills to produce high quality TTP. The IPT:

- Shares ownership of, and responsibility for, a product or process;
- Provides coordinated approval in each member’s area of expertise;
- Tests and validates TTP while being developed and/or after promulgation changes.

FC-P oversees TTP development, either “from scratch,” or by revising an existing TTP. The assigned IPT integrator recruits IPT members (via request for commitment memorandum – RCM), and supports the IPT during new TTP development. IPTs develop TTPs that support primary (e.g., field operators) and secondary (e.g., staff officers, program offices, etc.) audiences.

FC-P (or authorized signer) has the authority to establish an IPT for TTP development; however, each IPT member's supervisor must also consent, via RCM, to commit that member to the IPT.

The RCM designates the IPT members, requires that a member's supervisor acknowledge commitment to the IPT, and initially assigns those members to one of two IPT membership status roles: principal or advisory. Each status represents an anticipated workload or personnel capacity. A sample RCM is included in Appendix F:

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**B.5.a. IPT  
Membership**

IPT membership includes SMEs and relevant stakeholders (people with a vested interest in the TTP's content). An enclosure to the publication development order (PDO) and/or RCM lists the proposed IPT membership (see Appendix F:); however, if the IPT's focus changes, membership can vary throughout the project (FC-P governs all membership changes).

When selecting IPT members, integrators must remember that while a potential content leader might have keen SME knowledge and the necessary organizational skills and enthusiasm to serve on the IPT, he or she might not be in the best position to observe from the "service-wide need" perspective.

Additionally, each TTP project has its own "character" and unique requirements, which means that a standard "go-to" list of SMEs might not have sufficient experience to address a project's unique information needs. In these cases, integrators must reach out beyond standard lists, and look service-wide for SME and/or stakeholder support. This requires progressive planning by integrators to ensure complete coverage of all strategic perspectives for a given TTP project.

The integrator governs changes to the associated duties of members or participants, as duties can vary or change over time. The integrator also maintains and updates an accurate membership list at regular intervals, or as the membership and responsibilities change. If a principal or advisory IPT member transfers or can no longer perform the duties of that role, the IPT member and his or her supervisor must contact the integrator to coordinate replacement with a properly briefed member who has the appropriate level of expertise to give coordinated approval.

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**B.5.b. Critical  
IPT Members**

When selecting IPT members for a given project, the integrator must ensure representative coverage from (at minimum) the following critical entities:

- HQ/Program office (as policy owners)
- Legal
- Safety
- Training Centers (TRACENS)

- National Centers Of Excellence (NCOEs)
  - PAC/LANT/district/unit level SMEs
  - Shore Infrastructure Logistics Center (SILC).
- 

**B.6. Integrating Reserve Program Administrators into the IPT**

The reserve program administrator (RPA) corps consists of O-2 to O-6 level reserve program SMEs, and is geographically located throughout the Coast Guard. RPAs exist at all levels (field, district, HQ, etc.). If needed, IPTs can request reserve resources from the continental United States (CONUS) and/or Alaska and Hawaii.

When developing or updating new documents, a reserve program SME can review and determine if the subject affects, or involves the Reserve program or Reservists. RPAs are available if the reserve program SME determines that an IPT needs reserve involvement.

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**B.7. USN-USCG Multiservice TTP Development**

Due to mission similarities between the two services (e.g., diving operations, CD/AMIO, aviation, etc.), the Navy and Coast Guard frequently collaborate when developing multiservice TTP. When developing joint USN/USCG TTP, FC-P partners with the Naval Warfare Development Command (NWDC – the Navy’s equivalent to FC-P). NWDC designates a Coast Guard liaison officer who is part of the development process.

In general, the lead service drives the TTP development process (e.g., if the Navy has developmental lead, the IPT follows the Navy’s process), which (in short) is as follows:

1. Project proposal submitted to NWDC by letter or message.
2. Project proposal validated (front-end analysis), confirming or denying voids in doctrine or TTP.
3. Program directive (PD) message by NWDC formally initiates the project.
4. Work begins on first draft (and subsequent drafts, if needed).
5. Signature, promulgation.

For more information on the Navy’s doctrine and TTP development processes, see The Navy Warfare Library, NTTP 1-01, available for download on the Navy’s doctrine library system (NDLS) website (CAC-enabled) at: <https://ndls.nwdc.navy.mil/>. The NDLS also hosts Coast Guard publications on operations in which the Navy and Coast Guard work together.

For more information, see NWDC’s website (CAC-enabled site) at: <https://www.nwdc.navy.mil/>.

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## Section C: COMDTINST Characterization and Concurrent Clearance Review

### C.1. Characterization Overview

In June of 2011, reference (b) The Coast Guard Directives System, COMDTINST M5215.6 (series), designated FC-P a required signatory in the concurrent clearance process for all draft directives. All draft Commandant instructions must come through FC-P for a concurrent clearance review (that includes characterization) to determine their compliance with TTP development standards.

Characterization is a thorough “page-by-page” analysis of a draft instruction to determine its percentages of doctrine, policy, and TTP content. Each of the three content types receives a distinct color highlight (yellow for doctrine, green for policy, and blue for TTP) so the originator can easily and quickly see each content type. The figure below is a sample characterized page.

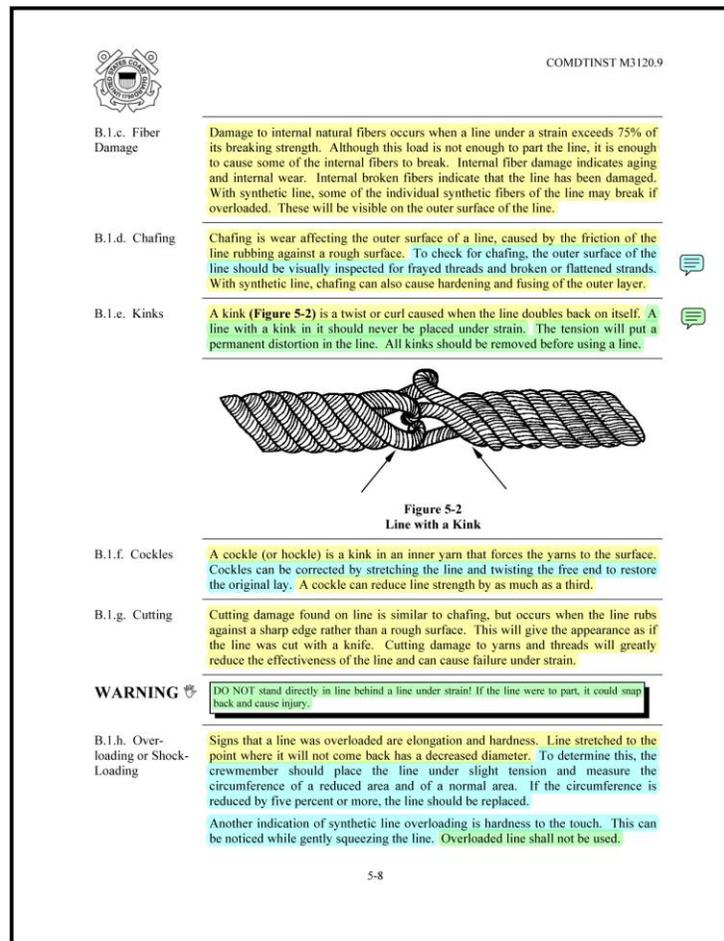


Figure 3-3 Sample characterized page

## C.2. Statistics

As of this publication’s promulgation date, FC-P analysts characterized over 200 draft Commandant instructions/manuals, totaling over 27,000 pages of carefully reviewed text.

Based on FC-P analyses since 2009, the “average” Commandant instruction / manual has the following characteristics:

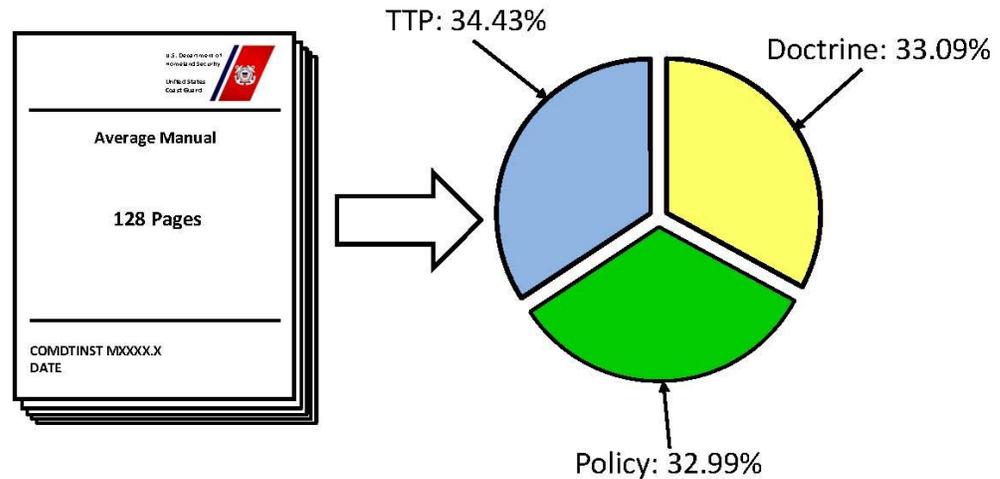


Figure 3-4 Characteristics of an average Commandant instruction/manual

While these numbers represent the “average,” they indicate the complex nature of intermixed information types present in USCG publications.

## C.3. Why Characterize?

FC-P characterizes publications so its originators and/or IPT members can quickly see content that belongs to them, and/or what does or does not belong in a TTP publication.

FC-P analysts also provide helpful comments on authoring/formatting issues noted when characterizing the publication. FC-P analysts comment (make suggestions or recommendations) on issues such as (not an all inclusive list):

- Instances of passive voice vs. active voice (reference (b) The Directives System, COMDTINST M5215.6 (series) and reference (d) The Correspondence Manual, COMDTINST M5216.4 (series) recommend active voice because it preserves accountability).
- Excessive wordiness/overly complicated phrasing.
- Typos/incomplete sentences, bad page breaks, missing page numbers, etc.
- Incorrect term use (e.g., “utilize” vs. “use”).
- Instances of “shall” in procedures.

#### C.4. Requesting a Document Characterization

To request a concurrent clearance review for a draft directive or characterization of an existing (or proposed) publication, do the following:

1. Browse to: <https://cgportal2.uscg.mil/library/SitePages/Home.aspx>.

The “USCG References” page opens.

2. In the left navigation pane, click the “Tactics, Techniques, and Procedures (TTP) link.

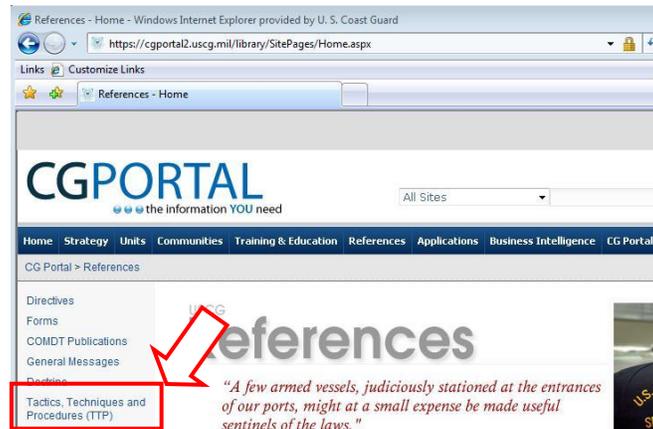


Figure 3-5 CGPortal references page

The “Tactics, Techniques, and Procedures (TTP) Division (FC-P)” portal page opens.

3. In the left navigation pane, click the “TTP Collaboration” link.

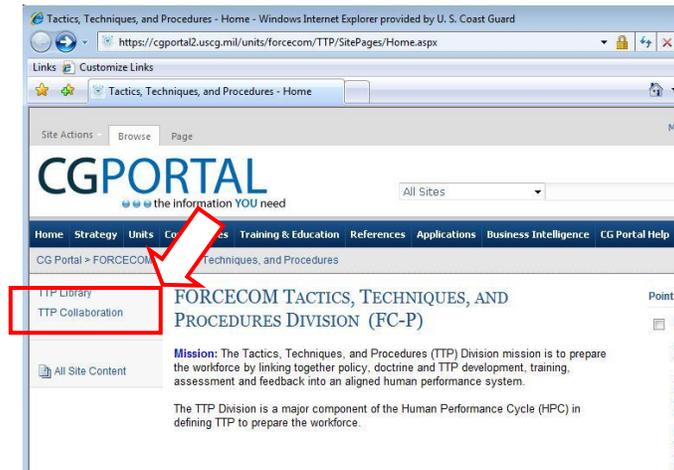


Figure 3-6 CGPortal FC-P division page

The TTP division home page opens.

4. In the left navigation pane, click the “Request Document Characterization” link.

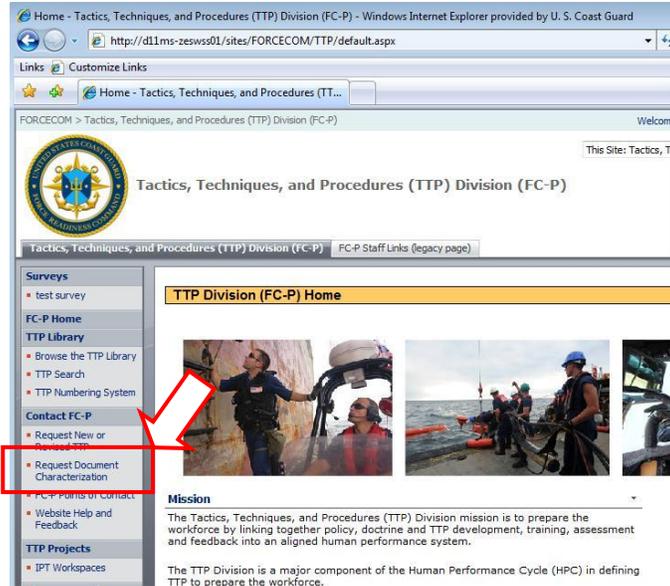


Figure 3-7 FC-P Division SharePoint home page

The Characterization Request page opens (see Figure 3-8).

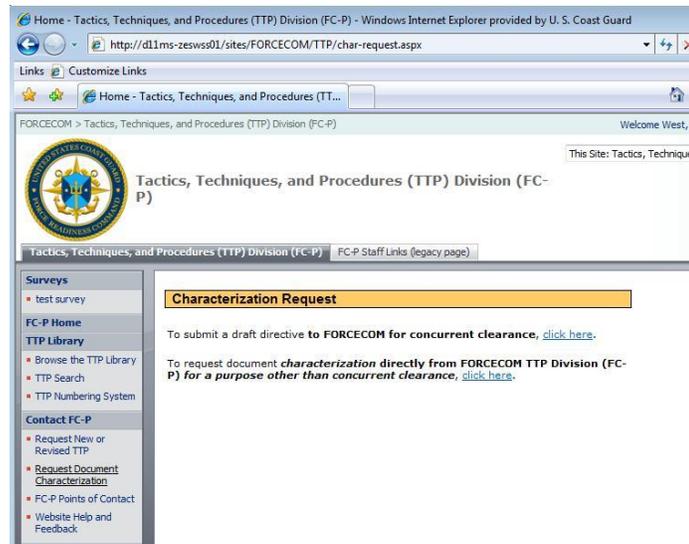


Figure 3-8 FC-P Division characterization request page

5. Click the appropriate link to bring up an email form, pre-addressed to either FC-P's concurrent clearance request queue, or the manager of the characterization effort.
6. Provide information about the request (including the document, attached to the email) and send the email request.

**C.5. Characterization Process Overview**

The figure below gives a high-level overview of the entire characterization process, from the point at which FORCECOM Business Operations (FC-B) receives a draft document (either in concurrent clearance or for characterization review) to when FC-P returns the digitally signed memo, summary, and characterized document to the originator.

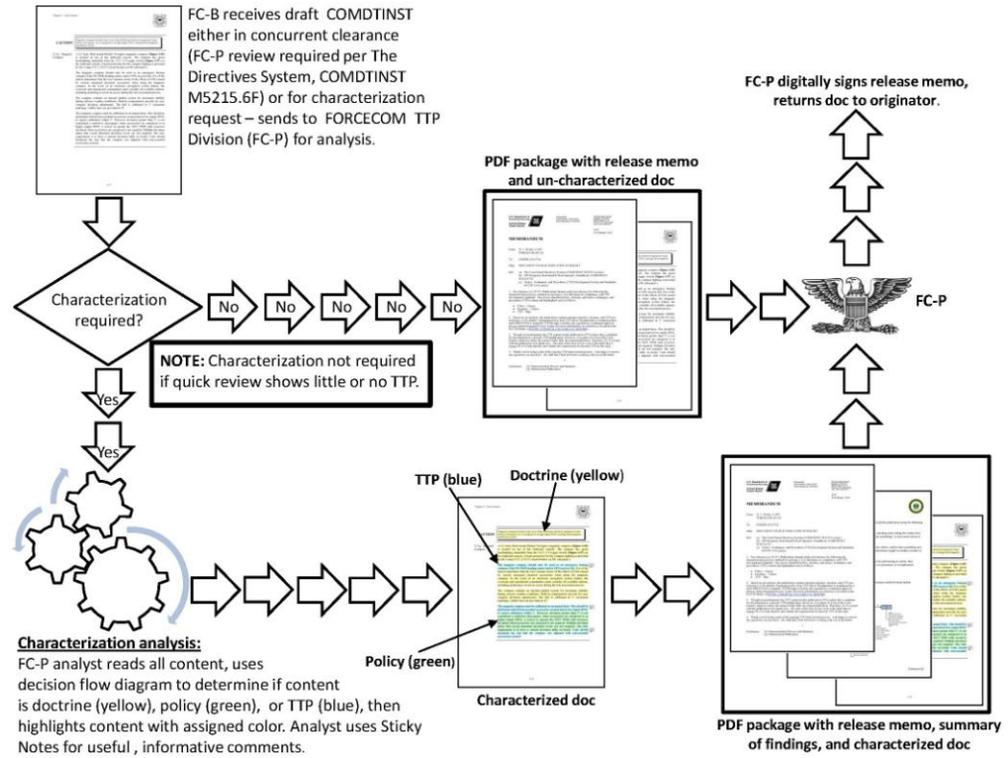


Figure 3-9 Characterization Process Overview

**C.6. FC-P “Concur” or “Non-Concur” Criteria**

When characterization is complete, the FC-P analyst generates and attaches to the characterized pub a memo and summary of findings, which lists percentages of each type of information found. Based on the amount of TTP, FC-P concurs without comment, or suggests/strongly recommends engaging FC-P to help extract the TTP and develop a discrete TTP publication. FC-P uses the following values for the determination:

- Less than 20% identified TTP: FC-P concurs without comment.
- 20% to 50% TTP: FC-P suggests extracting the TTP to create a discrete TTP publication.
- Greater than 50%: FC-P strongly recommends engaging FC-P to develop a discrete TTP publication.

While these percentages are not absolute, they help facilitate potential future TTP development discussions with FC-P.

## Section D: Developing TTP

### D.1. Overview

The most current model that FC-P uses for TTP development has two overall activities: project selection, and project execution.

FC prioritizes projects based on FC-P’s recommendations, and uses OHPAC to validate these priorities (e.g., an emergent need, incident, injury, regular update cycle, the results of a concurrent clearance review, or field request).

Once selected, FC-P (or authorized signer) executes the project by assigning an integrator, who pulls together an integrated process team (IPT) which creates several draft documents, which eventually become a signed and promulgated TTP publication.

Figure 3-10 represents the flow for new TTP projects. The “OHPAC” area (left side) shows the work that OHPAC does when prioritizing projects. The right side shows FC-P’s TTP development work.

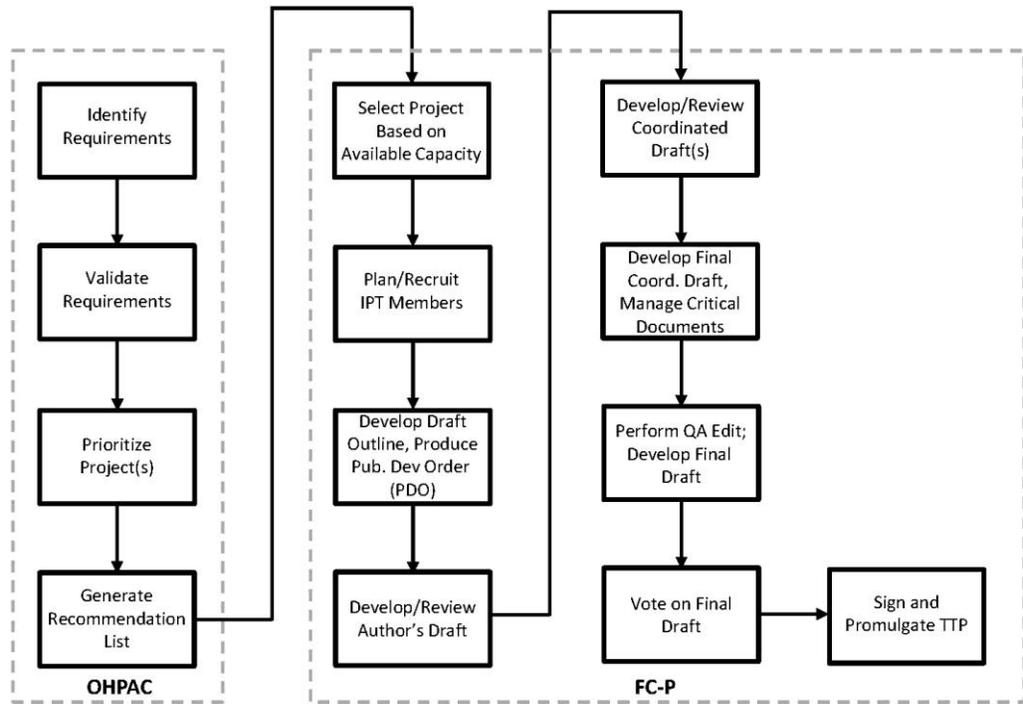


Figure 3-10 TTP project selection and execution

### D.2. TTP Project Selection

To select TTP projects, FC-P collects and analyzes indicators of possible TTP requirements from a variety of sources using a variety of methods. Project selection can also come from OHPAC’s recommended project list.

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### **D.3. TTP Project Statistics**

Following are some statistics gathered by FC-P on duration, complexity, and size of TTP projects.

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#### **D.3.a. TTP Project Duration**

The goal is to complete all TTP projects within a 12-month cycle. However, experience has shown that some easier (or smaller) projects can take significantly less time and others – depending on the complexity – can take much longer.

Issues affecting TTP project duration can include (but are not limited to):

- The subject’s level of operational risk.
- Revision versus new “from scratch” project.
- Availability of IPT members.
- The topic’s level of complexity.
- Un-planned changes to policy.
- Injury or death requiring immediate review and change.

Out of an abundance of caution, TTP projects on topics with the risk of injury or death receive much more thorough scrutiny than “less risky” projects.

FC-P statistics, collected since 2009, show that the fastest TTP project turn-around time – from start to promulgation – was one week (5 days). The longest project took just over 18 months (551 days) because of the topic’s risk, importance, and complexity. Given those figures, the “average” time to complete a TTP project is about 9 months.

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#### **D.3.b. TTP Publication Size Statistics**

TTP projects come in all sizes, from relatively simple 16-page publications to extensively detailed publications exceeding 300 pages. Current FC-P statistics show the “average” TTP publication size to be just over 100 pages.

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### **D.4. TTP Project Execution**

FC-P conducts project execution activities in sequence to develop, approve, and publish TTP to answer the requirements identified during project selection.

The following sections detail the TTP development processes.

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#### **D.4.a. Stage 1: Prepare, Recruit IPT Members**

**Owner (Role):** Integrator

**Participants:** Integrator, developmental editor, stakeholders/partners, FC-P (or authorized signer)

**Overview:** The integrator scopes the project with stakeholders; develops the RCM packet; gets it approved; and sends it to stakeholders. Stakeholders respond by committing IPT members to the project.

**Process:**

Step	Action
1.1	Initiate project and set up web content
1.2	Gather documents and information
1.3	Develop and approve the RCM packet
1.4	Review the RCM packet (each stakeholder office)
1.5	Prepare for alignment meeting(s)

D.4.b.  
Stage 2:  
Develop Draft  
Outline;  
Produce  
Publication  
Development  
Order

**Owner:** Integrator

**Participants:** Integrator, Content Leader, Authoring Group, Advisory and Principal IPT Members, Developmental Editor

**Overview:** The integrator and content leader guide the IPT through developing a draft outline. The integrator develops the PDO packet (which includes the outline) and gets it approved.

**Process:**

Step	Action
2.1	Develop the draft outline
2.2	Develop and approve the PDO packet

D.4.c.  
Stage 3:  
Develop and  
Review  
Author's  
Draft

**Owner:** Integrator

**Participants:** Integrator, Content Leader, Authoring Group

**Overview:** The authoring group develops raw content for the new publication. The developmental editor assembles the content and posts it for shared review. IPT members review and comment in the author's draft. The developmental editor adjudicates the author's draft comments.

**Process:**

Step	Action
3.1	Develop the author's draft
3.2	Review author's draft

D.4.d.  
Stage 4:  
Develop and  
Review  
Coordinated  
Drafts

**Owner:** Integrator

**Participants:** Integrator, Content Leader, Advisory and Principal IPT Members, Developmental Editor

**Overview:** The developmental editor edits the author's draft to produce the initial coordinated draft and posts it for shared review. IPT members review and comment in the coordinated draft. The developmental editor adjudicates the coordinated draft comments.

This cycle can repeat multiple times; some cycles might coincide with field validation activity. The stage ends when the integrator determines that the project needs further review cycles.

**Process:**

Step	Action
4.1	Develop and review coordinated drafts

D.4.e.  
Stage 5:  
Develop Final  
Coordinated  
Draft; Manage  
Supporting  
Docs

**Owner:** Developmental editor

**Participants:** Developmental editor, content leader, integrator

**Overview:** The developmental editor edits the final coordinated draft and submits it for a QA edit. The integrator drafts the message that will go out via CGMS when FC-P releases the publication. The record coordinator audits IPT workspaces for critical documents (e.g., RCM/PDO packets, approval vote outcomes, references, etc.). The integrator ensures that all critical documents necessary for FC-P (or authorized signer) to review are on hand.

**Process:**

Step	Action
5.1	Develop the final coordinated draft; audit critical documents
5.2	Draft release message and letter of promulgation

D.4.f.  
Stage 6:  
Perform QA  
Edit; Develop  
Final Draft

**Owner:** SST QA editor

**Participants:** SST QA editor, developmental editor, integrator

The SST QA editor reviews the coordinated draft to ensure it complies with TTP publication standards while the developmental editor ensures that it remains substantively accurate. The developmental editor prepares the final draft for coordinated approval voting by principal IPT members.

**Process:**

Step	Action
6.1	Perform QA edit
6.2	Review QA edit
6.3	Develop the final draft

D.4.g.  
Stage 7:  
Vote on Final  
Draft

**Owner:** Integrator

**Participants:** Integrator, content leader, principal IPT members

**Overview:** The principal IPT members vote on the final draft, with or without submitting comments. If comments or rejections result in changes to the TTP draft, the project can revert to an earlier stage.

When all principal IPT members approve the final draft, it undergoes a final QA review before signature routing.

**Process:**

Step	Action
7.1	Vote on the final draft
7.2	Review voting results and comments

D.4.h.  
Stage 8:  
Sign and  
Promulgate  
TTP

**Owner:** FC-P (or authorized signer)

**Participants:** Integrator, developmental editor, FC-P (or authorized signer)

The developmental editor packages the TTP draft for signature and submits it to FC-P (or authorized signer), who reviews the signature copy. If FC-P (or authorized signer) signs the signature copy (see D.5 below), it is ready for promulgation. If FC-P (or authorized signer) returns the signature copy with comments, the project reverts to an earlier stage.

**NOTE:**

**If required (i.e., the publication is FOUO / SSI), password-protect the TTP before sending for signature.**

**Process:**

Step	Action
8.1	Package and approve signature copy
8.2	Input abstract information
8.3	Stage the signed publication
8.4	Issue the release message
8.5	Post the signed publication in the TTP library
8.6	Post the signed publication for staff internal review
8.7	Recommend policy, doctrine, training, or other solutions

**D.5. TTP  
Signature  
Tool**

When the draft TTP publication has undergone its final QA, the developmental editor converts the TTP publication Word document to Adobe PDF. He or she then uploads the signature-ready publication (in PDF format) to a SharePoint site specifically set up for the signing process. Once uploaded, FC-P (or authorized signer) receives an automatic email alert that the publication is ready for review and/or signature.

FC-P (or authorized signer) reviews the draft publication and, if there are no corrections needed, digitally signs the publication.

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**D.6. Printed Publications**

As stated in this publication’s letter of promulgation (LOP), FORCECOM does not, generally, print and distribute TTP publications. Commands can print publications from the TTP library (see Chapter 4, section Chapter 4:A.6 “Local Reproduction,” on page 4-4), though any printed publications are for reference only as they cannot be updated.

If commands want to print copies of a non-standard sized publication (e.g., Range Training Handbook, CGTTP 3-30.3 (series) – in the 5.5” x 8.5” handbook format), FC-P can provide the publication’s specifications to the command or the Government Printing Office (GPO) (e.g., size, paper stock, binding, covers, etc.), and the command can then work directly with GPO.

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**D.7. Developing CGIPs**

Occasionally, there is a need to either quickly develop a publication for an emergent need (e.g., Oil Spill Response Vessel Decontamination Examination TTP, Marking Cartridges and Blank Firing Weapon Training Systems TTP, etc.), or break a draft publication into separate TTP and policy publications as a tool for discussion with, for example, a program office. CGIPs can serve both needs.

CGIPs are quickly developed, short turn-around publications that fill a specific, immediate need. Because each CGIP is only a “temporary” solution until a formal TTP publication is developed, they have a relatively short one-year review cycle.

CGIPs do not go through the full IPT coordinated approval process. Instead, an integrator and developmental editor work together to identify and separate out any overriding policy that does not need to remain with the TTP, and create a working draft CGIP. FC Commander signs CGIPs.

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**D.8. Non-Standard TTP Development**

In some circumstances, the formal IPT process might not be the most advantageous. For example, a particular community might need to develop its own publication “in-house,” seeking only high-level FC-P guidance.

FC-P has established different possible courses of action to cover these circumstances:

- The individual program office develops the TTP and updates its own manual(s) (with standards oversight by FC-P).
- FC-P leads an IPT that develops and publishes the TTP separately.
- FC-P leads an IPT that develops and publishes the TTP separately, and the program office either adds the TTP to their parent publication, or includes a link to the TTP in its publication.

FC-P is exploring and developing partnerships with different entities to assist with TTP development when FC-P resource constraints limit its involvement.

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**D.9. Process Mechanisms**

The coordinated approval process relies heavily on Web-based collaboration. Customized tools in standard USCG software applications (e.g., Microsoft SharePoint, Word, Excel, and Adobe Acrobat, etc.) are central to the process.

For more information, see Appendix B: Collaboration Tools for TTP Development.

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**D.9.a. Collaboration Environment**

A Microsoft SharePoint site is the IPT’s primary collaboration environment. It provides permission-based access to tools for collaborative authoring, comment, approval, or rejection of TTP publications, and discussions of IPT business. The site captures and retains key activity, which reduces recordkeeping while ensuring transparency and accountability.

Each IPT has its own SharePoint project site, with access limited to only the IPT’s members and selected FC-P (or authorized signer) staff. A list of IPT SharePoint collaboration sites is found at:

For more information, see Appendix B: Collaboration Tools for TTP Development.

---

**D.9.b. Commenting Tools – Adobe Acrobat**

IPT members frequently review and comment on documents or legacy publications posted in PDF form on the SharePoint site as Adobe Acrobat shared reviews. Acrobat’s built-in commenting tools allow participants to post review comments using a variety of methods (such as ‘sticky notes,’ paragraph highlighting, text ‘cross outs,’ and underlines, etc.), and all participants can read and respond to comments in a dynamic, interactive, and near-real-time review process.

For more information, see Appendix B: Collaboration Tools for TTP Development.

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**D.9.c. Collaborative Authoring**

When IPT members work on a project in SharePoint, each takes turns editing the documents in the team’s author’s draft development library.

Only one member at a time can check out and edit a document from the library. This prevents other team members from making redundant or conflicting changes.

When a member checks a document back into the library, SharePoint creates a new version of the document and retains the previous version for comparison by other members (who can see what changes were made and by whom).

This automatic version tracking reduces the need to use Microsoft Word’s change tracking (though you can still use Word’s “**Track Changes**” feature).

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**D.10.  
Classified  
TTP  
Development**

Developing classified TTP projects is similar, in concept, to developing unclassified projects – FC-P assigns an integrator (who reaches out to various USCG entities for IPT member support), and developmental editor, and all collaboration takes place on a SharePoint site created for the project.

However, developing a classified TTP project also requires very tight controls for safeguarding the content, and ensuring current security clearances for all personnel working on the project.

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D.10.a.  
Safeguarding  
Classified  
Content

Additional required controls to safeguard classified information include:

- FC-P maintains all classified documents associated with a classified TTP project on a secure SharePoint site, accessible via secure internet protocol router network (SIPRNet).
  - All IPT meetings, whether by secure phone teleconference (STU) or video teleconference (VTC), must be held in secure spaces.
  - All classified content must be marked per reference (e), COMDTINST M5510.23 (series) Classified Information Management Program (see Appendix G, page G-1).
- 

D.10.b.  
Personnel  
Security  
Clearances

The classified TTP project’s integrator ensures that all IPT and FC-P (or authorized signer) members working on the project have a security clearance level that is appropriate for the content’s classification level.

The integrator also coordinates site visit requests for necessary staff and/or IPT members traveling to project meetings at secure locations.

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## Chapter 4: Maintaining The Coast Guard TTP Library

**Introduction** This chapter describes FC-P's maintenance of the library for all Coast Guard TTPs.

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**In This Chapter** This chapter contains the following sections:

Section	Title	Page
A	Maintaining the Coast Guard TTP Library	4-2

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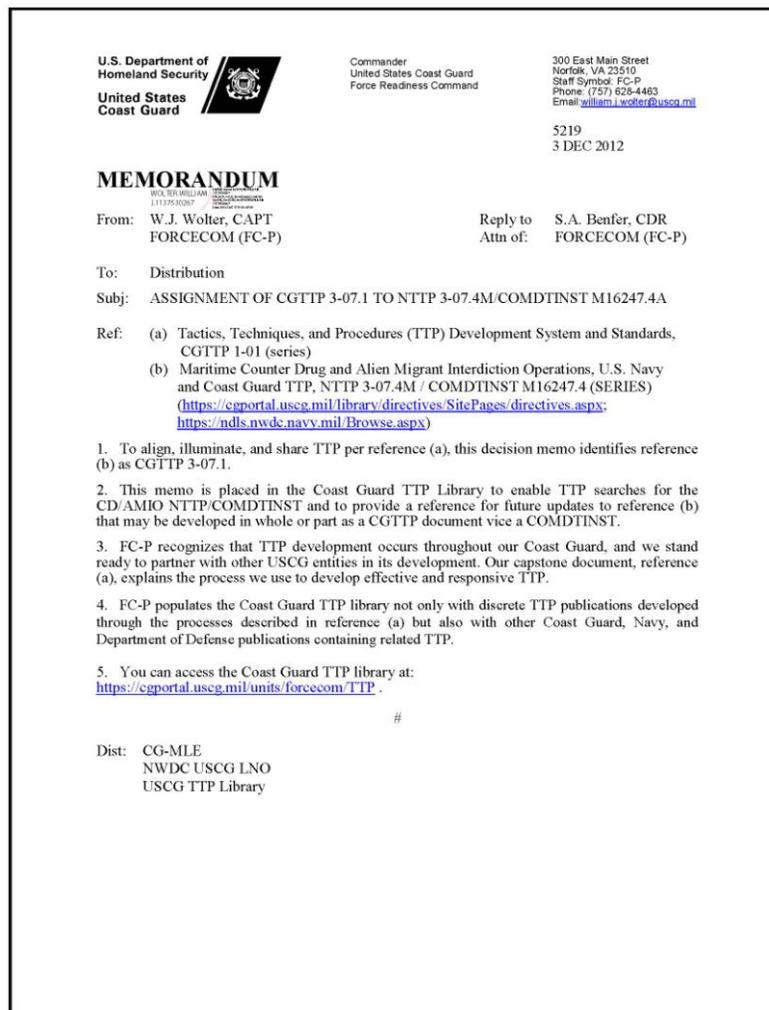
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## Section A: The Coast Guard TTP Library

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**A.1. Purpose** FC-P maintains the Coast Guard’s TTP Library, which contains new and revised editions of all Coast Guard tactics, techniques, and procedures (CGTTP) publications, Coast Guard interim publications (CGIPs), and Commandant Instructions (CIs) containing TTP. The library also has “placeholder” memorandums directing users to other documents (including other service’s doctrine and TTP publications) with information that supports or compliments a Coast Guard TTP publication (e.g., Navy CD/AMIO manuals that support USCG CD/AMIO).

Figure 4-1 is a sample placeholder memo that both assigns a CGTTP number and points users to the Navy’s CD/AMIO Manual.



**Figure 4-1 Sample TTP library placeholder memorandum**

## A.2. Accessing the Library

Users can access the Coast Guard TTP Library via the USCG Tactics, Techniques, and Procedures (TTP) link on the CG Portal “References” page.

(<https://cgportal2.uscg.mil/library/SitePages/Home.aspx>).



Figure 4-2 Link to the USCG TTP library

## A.3. Document Format

Publications in the Coast Guard TTP Library are in Adobe PDF format.

## A.4. Publication Revisions

FC-P no longer does changes and change notices to TTP publications. After initial release, FC-P revises all subsequent releases as follows:

- For TTP revisions with changes to less than 50% of the pages:
  - FC-P lists the major revisions in the LOP by referring to chapter(s), section(s) and, if necessary, sub-section(s).
  - FC-P marks individual revisions in the TTP publication’s text file, using custom Acrobat stamps to identify changed text in the PDF.
  - FC-P updates the publication number with a “.n (numerical)” designation (e.g., “CGTTP 1-01B.1”).
- For TTP revisions with changes to more than 50% of the pages:
  - FC-P provides a broad overview of changes in the LOP, listing the chapter(s), and/or section(s) readers should review, or advising readers to review the entire TTP publication.
  - FC-P does not mark individual revisions in the TTP publication’s text file.
  - FC-P updates the publication revision letter to the next highest letter.

**NOTE:**

**Printed publications are “For Reference Only,” since they cannot be updated as quickly as the online (most current) versions.**

**A.5. CGMS Messages**

The FORCECOM commander (FC-C) issues CGMS messages for the following reasons:

- Announce released and/or cancelled CGTTP/CGIP publications.
- Distribute CGTTP/CGIP revisions.
- Update the list of effective publications in the Coast Guard TTP Library.

**A.6. Local Reproduction**

Commands can print local “For Reference Only” copies of publications from the Coast Guard TTP Library.

See reference (e) The Classified Information Management Program, COMDTINST M5510.23 (series) for instructions on handling and reproducing sensitive (e.g., containing law enforcement and/or tactical information) and classified publications.

**A.7. Foreign Disclosure**

Reference (e) The Classified Information Management Program, COMDTINST M5510.23 (series), governs disclosure of material in Coast Guard publications to foreign governments or international organizations.

## Appendix A: Glossary and Acronyms

<b>AAR</b>	After action report.
<b>Advisory IPT Members</b>	IPT members with a specific scope of ownership or expertise (e.g., legal, safety, reserve program administrators (RPAs), etc.). Advisory members can access the process and information, and make decisions for their particular area of expertise.
<b>ALSA</b>	Air, land, sea application Center; the primary developer of multiservice TTP (MTTP). See ALSA’s Website at: <a href="http://www.alsa.mil">http://www.alsa.mil</a> (valid CAC required).
<b>Authorized Signer</b>	An authorized signer is an O-6, who is (typically) the CO of a FORCECOM and/or Deputy Commandant for Mission Support (DCMS) unit, who has FC-delegated TTP development and signature authority.
<b>Author’s Draft</b>	The first draft in which the editor combines and formats all separate working chapters and appendices, and posts for review.
<b>CALIPER</b>	Consolidated assessment and lessons identified process for evaluation and reporting – a Web-based SharePoint system for capturing lessons learned.
<b>CD/AMIO</b>	Counter-drug/alien migrant interdiction operations.
<b>CGIP</b>	Coast Guard interim publication – rapidly developed “temporary” publications with a 1 (one) year review cycle.
<b>CGMS</b>	Coast Guard message system. Authorized users can access CGMS at: <a href="https://web.cgms.uscg.mil/">https://web.cgms.uscg.mil/</a> .
<b>CG-SAILS</b>	Coast Guard Standard After Action Information and Lessons Learned System – a Web-based system for capturing after action reports (AARs), lessons learned, and best practices (being replaced by CALIPER).
<b>CGTTP</b>	Coast Guard tactics, techniques, and procedures.
<b>Characterization</b>	A detailed page-by-page analysis of a draft publication to determine its percentage of doctrine, policy, and TTP content and highlighting each type with a specific color to make them more easily seen.

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<b>Concurrent Clearance</b>	The process in which a draft publication sequentially passes through multiple reviewers for content review, comment, and approval.
<b>Content Freeze</b>	The point at which no new “non-critical” content is added to a TTP in development. Content freeze usually occurs after the IPT members approve the final coordinated draft, and the draft TTP goes to the Systems & Standards team for a quality assurance/quality control (QA/QC) edit. FC-P must approve any additional changes, including any critical issues (i.e., safety, legal, etc.) that arise once the draft TTP is in content freeze.
<b>Content Leader</b>	The person who leads a TTP’s writing and revision process, and is responsible for its accuracy and relevance. Content leader selection is often based on organizational position or superior subject matter expertise.
<b>Coordinated Draft/Approval</b>	<p>The coordinated draft is the IPT-produced draft of a proposed TTP’s updated content. IPT members collaborate on the content, then work with the editor to refine the content’s wording, grammatical structure, and format. Once approved by the IPT, the TTP has coordinated approval.</p> <p>This approval system significantly reduces the time for manual revisions.</p>
<b>COP</b>	Common operating picture – a concept in which the same operational information is shared among more than one command to enhance unified situational awareness.
<b>CTP</b>	Common tactical picture – an accurate and complete display of relevant tactical data that integrates tactical information from multiple sources into a single source.
<b>DCMS</b>	Deputy Commandant for Mission Support.
<b>DCO</b>	Deputy Commandant for Operations.
<b>Developmental Editor</b>	The person responsible for working with integrator and/or IPT members on authoring, assembling, editing, and formatting TTP per established and approved standards.
<b>FC-C</b>	FORCECOM Commander
<b>FC-P</b>	FORCECOM TTP Division.
<b>FC-Pi</b>	FORCECOM TTP Division, Integration branch.

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<b>FC-Pll</b>	FORCECOM TTP Division, Lessons Learned branch.
<b>FC-Pp</b>	FORCECOM TTP Division, Publications branch.
<b>FC-Psst</b>	FORCECOM TTP Division, System and Standards team.
<b>FORCECOM</b>	Force Readiness Command.
<b>HPC</b>	Human performance cycle.
<b>HPT</b>	Human performance technology.
<b>Integrator</b>	The person in charge of the TTP development process. The integrator is usually a member of FC-P Integration Branch (FC-Pi), and is designated by FC-P. The integrator forms and oversees the IPT's activities. Basis for the integrator's selection is familiarity or expertise with the TTP's subject (though familiarity with the process is more important).
<b>IPT</b>	Integrated process team; A cross-disciplinary team of SMEs responsible for TTP development. IPT members are recruited from offices, units, and communities that have expertise in, or authority over, the TTP's subject.
<b>IPT Workspaces</b>	Sub-sites in the main FC-P collaboration site.
<b>JP</b>	Joint publication.
<b>LOP</b>	Letter of promulgation.
<b>MCTL</b>	Marine Corps task list.
<b>MMOP</b>	Multinational maritime operations manual.
<b>MP</b>	Multinational publications.
<b>NCOE</b>	National Center of Expertise.
<b>NDP</b>	Naval doctrine publication.
<b>NTTP</b>	Naval tactics, techniques, and procedures publication.
<b>NTRP</b>	Naval technical reference publication.

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<b>NWDC</b>	Naval Warfare Development Command (formerly the Naval Doctrine Command, NDC) – the Navy’s center for concepts, experimentation, modeling and simulation, doctrine, and lessons learned. See their Website at <a href="https://www.nwdc.navy.mil/">https://www.nwdc.navy.mil/</a> .
<b>NWP</b>	Naval warfare publication.
<b>OHPAC</b>	Operational Human Performance Advisory Council.
<b>Plan of Action and Milestones</b>	Lists major milestones, the responsible entity, and duration of each TTP development milestone.
<b>Principal IPT Members</b>	IPT members with broad ownership of the process or programs and whose consult is required in nearly every subject related to the primary content.
<b>Process Administrator</b>	The person who manages the IPT’s collaboration website and other process tools.
<b>Publication Development Order (PDO)</b>	The PDO, used to field new TTP requirements that come into FORCECOM, models the publication review order, except that the PDO is used to develop guidance “from the blank page.”
<b>QA/QC</b>	Quality assurance / quality control. A detailed page-turn-review of a draft publication to verify it meets all CGTTP standards before forwarding to FC-P for signature and promulgation. QA/QC occurs before all IPT members have approved the draft TTP.
<b>RCM</b>	Request for commitment memorandum, sent by FC-P to selected offices requesting their commitment on a given project (see Appendix F:) for a sample RCM).
<b>RPA</b>	Reserve program administrator.
<b>Shared Review</b>	Functionality built in to Adobe Acrobat that allows multiple team members to view, comment, and reply to others’ comments in a PDF document.
<b>SharePoint</b>	Microsoft SharePoint is a Web-based collaboration tool that provides Intranet content/document management. FC-P uses SharePoint for all TTP developmental collaboration functions.
<b>SIPRNet</b>	Secure internet protocol router network.

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<b>SME</b>	Subject matter expert.
<b>TACBUL</b>	Tactical bulletin.
<b>TACMEMO</b>	Tactical memorandum.
<b>TCF</b>	Task commitment form.
<b>TRACEN</b>	Training Center – one each at Cape May, NJ., Yorktown, VA., and Petaluma, CA.
<b>UJTL</b>	Universal joint task list.
<b>UNTL</b>	Universal Naval task list.
<b>Web Part</b>	Also sometimes referred to as a Web widget, Web parts are server controls, with pre-defined functionalities, that Web designers can embed in any Web page to allow end users to modify the content, appearance, and behavior of certain places in Web pages.

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## Appendix B: Collaboration Tools for TTP Development

<b>B.1. Overview</b>	<p>FC-P leverages technology to:</p> <ul style="list-style-type: none"><li>• Centralize and organize the work of integrated process teams (IPTs).</li><li>• Make document collaboration efficient and interactive.</li><li>• Guide and educate those who participate in TTP development.</li><li>• Enable FC-P staff members to record and report the progress of their TTP development projects.</li><li>• Give FORCECOM leaders and customers visibility on the process.</li></ul> <p>The two principal technologies used in TTP development are:</p> <ul style="list-style-type: none"><li>• SharePoint collaboration sites.</li><li>• Acrobat shared reviews, with comments hosted in SharePoint.</li></ul> <hr/>
<b>B.2. Types of Collaboration Sites</b>	<p>FC-P maintains multiple, project-specific sites called IPT workspaces and a separate, internal collaboration site primarily for its own staff, referred to here as “the FC-P collaboration site.”</p> <hr/>
<b>B.3. FC-P Collaboration Site</b>	<p>FC-P’s collaboration site is a hybrid site. It enables internal collaboration among the division’s staff and hosts all of the division’s staff-facing documents and information, as well as content visible to the entire service.</p> <p>FC-P’s collaboration site holds the TTP library, pages for the TTP numbering system and FC-P points of contact, the IPT’s workspaces, a page that explains the TTP development model, and pages for the TTP knowledge base and TTP stats.</p> <hr/>
B.3.a. TTP Library	<p>The TTP Library contains all TTP publications released by FC-P and selected other publications (including other service’s pubs) containing TTP.</p> <hr/>
B.3.b. TTP Numbering System	<p>The “TTP Numbering System” page shows scheme of series and subseries numbers used in TTP publication numbering.</p> <hr/>

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B.3.c. Contact Mechanisms Under “Contact FC-P” in the left navigation pane are the following links for contacting the division:

- “Request New or Revised TTP.”
  - “Request Document Characterization.”
  - “FC-P Points of Contact.”
  - “Website Help and Feedback.”
- 

B.3.d. IPT Workspaces The “IPT Workspaces” page contains hyperlinks to the IPT workspaces for all current TTP development projects.

To access a given IPT workspace, a user must be a member of that project’s IPT or a member of the FC-P staff.

See paragraph B.4 on page B-3.

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B.3.e. TTP Development Project Model The TTP development project model is a visual and textual representation of a typical TTP development project. The model divides a project into stages. Each stage consists of one or more processes. Each process comprises one or more tasks.

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B.3.f. TTP Knowledge Base The TTP Knowledge Base is a wiki library that documents many aspects of FC-P’s work. Some items are visible only to FC-P staff members; other items are visible to all Coast Guard intranet users.

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B.3.g. TTP Stats Page The “TTP Stats” page collects and organizes information on current and recently completed projects. It is a dynamic and enhanced version of the “Flag Tracker” document that the TTP Division chief has traditionally submitted weekly to the FORCECOM commander.

The page includes:

- A “90-day look ahead” calendar.
  - Roll-ups of work recently completed.
  - Details on current and recently completed projects.
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**B.4. IPT Workspaces**

Each TTP development project has a dedicated site in SharePoint called an IPT workspace. These sub-sites in the main FC-P collaboration site contain all documents and information related to a TTP project.

IPT workspaces give IPT members the ability to develop, review, and comment on author's drafts and coordinated drafts, and vote on the final draft. IPT workspaces also provide discussion boards to all participants, as well as a repository for project-supporting documents and information, and relevant CALIPER lessons. They serve as a repository for background and reference documents, staff working documents, and give views of project status details, points of contact, and IPT membership.

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**B.5. Acrobat Shared Reviews**

Adobe Acrobat's shared review function is FC-P's primary collaboration tool for creating or revising TTP publications. Shared reviews enable multiple IPT members to simultaneously view a document and to make comments (and reply to each other's comments) in a near-real-time conversation. This makes for a highly efficient and interactive review conversation.

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**B.5.a. Shared Review Concept**

When an FC-P staff member sets up a PDF document for shared review, he or she is creating a specially encoded version of the document that synchronizes comments to a network location instead of keeping the comments in the document itself.

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**B.5.b. File Behavior When Opening a Shared Review**

Each time a user opens a shared review PDF document, a "Welcome" dialog box appears, showing the names of all the users who have accessed the document so far (or been invited to it, depending on how the document was set up) and how many comments each user has made.

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**B.5.c. Interface**

A shared review PDF document contains a shared review toolbar, with "Check for New Comments" and "Publish Comments" buttons.

In addition, the "Comment & Markup" toolbar is always accessible in a shared review PDF, even if it is open in Adobe Reader or the Acrobat browser plug-in. This enables the user to insert sticky notes or other annotations in an otherwise 'read-only' document.

IPT members normally access shared review PDF documents in the "Documents for Shared Review" libraries on their IPT workspaces; the documents open in the Acrobat browser plug-in by default.

B.5.d. Comment Synchronization

Users do not save the encoded document after making comments; instead, he or she clicks the **Publish Comments** button that is unique to shared review PDF documents. The comments then synchronize to the central comment location, and a small pop-up shows how many comments were published.

At any time while the document is open, the user can synchronize all comments (made by all reviewers) into his or her copy of the document by clicking the **Check for New Comments** button. A small pop-up shows how many comments were imported.

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B.5.e. Path to Central Comment Location

The location of the comments is part of the file's encoding and cannot be changed after the encoded file is created. This means:

- The synchronization works no matter where the encoded document resides. Even if every user works in a separate copy of the encoded document, all of their comments synchronize to the central comment location (and then into all of the copies).
  - If the path to the central comment location is disrupted – for example, a directory is renamed or moved – the synchronization no longer works.
- 

B.5.f. Permissions

A user must have “write” permissions (“contribute” permissions, in SharePoint terms) on the central comment location in order to have his or her comments successfully published.

This is why, in FC-P's architecture, the central comment location for a given project is a document library on that project's IPT workspace. If participants have access to the workspace, they have the necessary permissions to synchronize comments in that project's shared review documents.

As an extra safeguard, when a new review is set up on an IPT workspace, the site sends email to the initiator to confirm the path to the central comment location for that review.

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## Appendix C: FORCECOM TTP Division (FC-P) Operations

**C.1. Overview** The FORCECOM TTP division (FC-P) recognizes the importance of having regular system integrity checks of its internal processes to maintain the highest fidelity in its TTP development program.

This requires regularly scheduled reviews and internal audits of all processes, Web sites, standards documents, and personnel assignments.

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**C.2. Monthly** At the end of each month, FC-P reviews statistics on the number of concurrent clearance reviews and characterized publications, the number of signed TTP publications, and the number of pending/backlogged TTP projects. FC-P also reviews the OHPAC TTP priority list. Finally, FC-P conducts a monthly archive the contents of its entire SharePoint site.

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**C.3. Quarterly** Each quarter, FC-P reviews its TTP development system and processes, during which FC-P collects/compiles quarterly feedback for the annual revision of CGTTP 1-01 (series) (this publication).

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**C.4. Annually** Each year, FC-P updates its capstone document, CGTTP 1-01 (series) with the latest changes, and reviews CGIPs to determine which require updating.

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**C.5. Tri-Annually** Every three years, FC-P reviews the TTP publications in the TTP library to determine which are coming into a review cycle.

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## Appendix D: Coast Guard TTP Numbering System

### C.1 NUMBERING SYSTEM

Series	Functional Field	Topic
<b>1: General / Administration</b>		
1	-0	Leadership
1	-01	Publication Reference
1	-02	Terminology Reference
1	-03	Reporting System
1	-05	Religious Ministry Support
1	-10	Tactical Reference
1	-11	Platform Capabilities
1	-12	Terrain
1	-14	Law
1	-15	Combat Stress
1	-16	Personnel
<b>2: Intelligence</b>		
2	-01	Intelligence Support
<b>3: Operations and Readiness</b>		
3	-07	Drug and Migrant Interdiction
3	-08	Interagency Coordination
3	-16	Multi-national – Operations/Training
3	-17	Operational Readiness
3	-29	Humanitarian Assistance
3	-30	Ordnance
3	-50	Search & Rescue
3	-56	Operational Command/Control
3	-59	Oceanography
3	-70	Ports, Waterways, and Coastal Security
3	-71	Aid to Navigation
3	-72	Marine Safety
3	-73	Living Marine Resources
3	-75	Marine Environmental Protection/Response

CGTTP 1-01B  
 TTP Development System and Standards

<b>3: Operations and Readiness (cont'd)</b>		
3	-76	Ice Operations
3	-77	Other Law Enforcement
3	-90	Aviation Across Missions
3	-91	Cutter Forces Across Missions
3	-92	Boat Forces Across Missions
3	-93	Law Enforcement Across Missions
3	-94	Ashore Across Missions
3	-95	Deployable Specialized Forces Across Missions
<b>4: Logistics</b>		
4	-01	Transportation
4	-02	Health Protection
4	-04	Engineering
4	-07	Maintenance
4	-08	Supply
4	-09	Other Logistic Services
4	-10	Conventional Ordnance
4	-11	Environmental
<b>5: Planning</b>		
5	-00	Task Force Planning
5	-01	Operational Planning
5	-02	Joint Task Force Planning
<b>6: C4IT</b>		
6	-01	Communications
6	-02	Tactical C4 Systems
<b>Nonstandard TTP Series</b>		
Multiservice TTP (Other Service's TTP Number or Sub-Series)		

## Appendix E: Sample Characterization Memo and Summary of Findings

**E.1. General** This appendix has samples of the memo and summary of findings included with every characterized draft publication. Use these samples when generating one of these documents.

**E.2. Memo** FC-P sends this memo, attached to the characterized draft publication, back to the originator describing what was done and how.

<b>U.S. Department of Homeland Security</b> <b>United States Coast Guard</b>		Commander United States Coast Guard Force Readiness Command	300 East Main Street Norfolk, VA 23510 Staff Symbol: FC-P Phone: (757) 628-4463 Fax: (757) 628-4511
			5217 19 June, 2012
<b>MEMORANDUM</b>			
<b>From:</b> W. J. Wolter, CAPT FORCECOM (FC-P)	WOLTER, WILLIAM, J.1137530267	<small>Digitally signed by WOLTER, WILLIAM, DN: cn=WOLTER, ou=USCG, o=U.S. DEPARTMENT OF HOMELAND SECURITY, email=WOLTER@USCG.MIL, c=US</small>	
<b>To:</b> COMDT (CG-DOL-4)			
<b>Subj:</b> DOCUMENT CHARACTERIZATION SUMMARY			
<b>Ref:</b>	(a) The Coast Guard Directives System, COMDTINST M5215.6 (series) (b) Coast Guard Force Deployment Planning and Execution (FDP&E), COMDTINST M 3122.01 (c) Tactics, Techniques, and Procedures (TTP) Development System and Standards, CGTTP 1-01 (series)		
1. Per reference (a), FC-P's Publications Branch analyzed reference (b) following the characterization process outlined in enclosure (1) to determine its compliance with TTP development standards. Our review identified policy, doctrine, and tactics, techniques, and procedures (TTP) content and highlighted each as follows:			
<ul style="list-style-type: none"><li>• Policy = Green</li><li>• Doctrine = Yellow</li><li>• TTP = Blue</li></ul>			
2. Based on our analysis, the publication contains intermixed policy, doctrine, and TTP (see enclosure (1) for details). Separating policy from TTP allows Headquarters to maintain policy, and FORCECOM to maintain TTP through a flexible and expeditious coordinated approval process using Integrated Process Teams (for more information see reference (c) located in the CGTTP library at <a href="https://CGPORTAL.USCG.MIL/CTL/1IEWJSH">HTTPS://CGPORTAL.USCG.MIL/CTL/1IEWJSH</a> ).			
3. I recognize it is not in the Coast Guard's interest to delay the release of this fully developed publication; therefore, FC-P concurs with the publication as it stands now. The start of the next review cycle is the ideal time to engage FC-P to help identify and validate the requirements for discrete TTP on this topic.			
4. Thank you for being a part of the ongoing TTP improvement process. I am happy to answer any questions you may have. My staff and I look forward to working with you in the future.			
#			
<b>Enclosures:</b>	(1) Characterization Process and Summary (2) Characterized Publication		

### E.3. Summary of Findings

Along with the memo, each characterized publication also has a summary of findings, describing the process used to characterize, and specific findings.

Page one gives definitions for policy, doctrine, and TTP, and a graphical decision flow representation of the analysis methodology FC-P uses to characterize the publication.



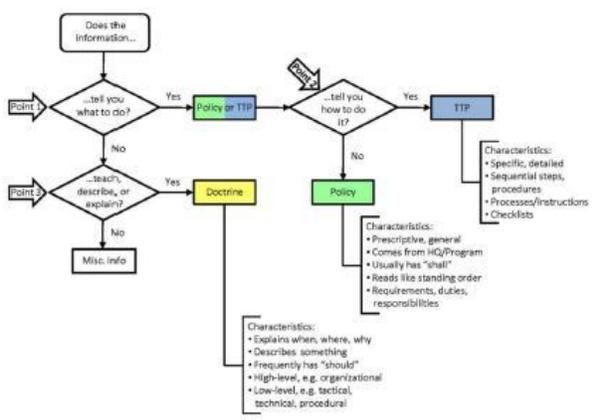
**Characterization Guidelines and Summary:**

FC-P's Publications Branch characterized (analyzed and color-highlighted) this publication using the following guidelines:

- **Policy:** Specific direction to the reader (think of it as a written standing order telling the reader they "shall do this," shall not do that, "are allowed/permitted to do something," or that some action or activity is or is not allowed/permitted.).
- **Doctrine:** A description of something, or an explanation of when, where, and/or why something was or is being done. Doctrine can be thought of as background information taught to enable a reader to do – and understand why they're doing – their job.
- **TTP:** Descriptions of tactics or helpful techniques (suggestions) for performing an action. Also describes specific steps or sequences to execute some process or procedure, or to implement doctrine or policy.

**Analysis Methodology:**

FC-P characterized this publication using the FORCECOM-developed analysis method shown below:



```
graph TD
    Start([Does the information...]) --> D1{...tell you what to do?}
    D1 -- Yes --> P1[Policy or TTP]
    D1 -- No --> D2{...teach, describe, or explain?}
    D2 -- Yes --> D[Doctrine]
    D2 -- No --> MI[Misc. info]
    P1 --> D3{...tell you how to do it?}
    D3 -- Yes --> TTP[TTP]
    D3 -- No --> P[Policy]
```

**Characteristics:**

- Explains when, where, why
- Describes something
- Frequently has "should"
- High-level, e.g. organizational
- Low-level, e.g. tactical, technical, procedural

**Characteristics:**

- Prescriptive, general
- Comes from HQ/Program
- Usually has "shall"
- Reads like standing order
- Requirements, duties, responsibilities

**Characteristics:**

- Specific, detailed
- Sequential steps, procedures
- Processes/instructions
- Checklists

Enclosure (1)

This is page 2 of the summary of findings. This page lists the percentages of identified doctrine, policy, and TTP, and discusses noted findings from the characterization analysis.



**Summary Comments:**

1. The characterized content in this publication contains a mixture of policy (green), doctrine (yellow), and TTP (blue), in the (approximate) ratios of:
  - a. 35% policy (green)
  - b. 18% doctrine (yellow)
  - c. 47% TTP (blue)

2. Most of this publication is written in "passive voice" ("this should be done") vs. "active voice" ("do this"). In many cases, converting the passive statements to active voice would make them actionable TTP. For example:

- a. "A directive must be issued..." -> "Issue directives when..."
- b. "The request will be submitted..." -> "Submit the request..."
- c. "An electronic signature may be used..." -> "You may use an electronic signature..."
- d. "A format is defined as..." -> "Formats are the structure..."

Sticky notes may give suggestions for converting some, but not all, passive statements to active voice.

3. Avoid the word "will," (e.g., "...the user will be required...", "...frequencies will result in...", etc.) which is too vague and problematic because of its potential dual-meanings (i.e., "will" = directed action, or "will" = future event). For example:

- a. (5<sup>th</sup> sentence, paragraph 2.D., page 5-4) "Manuals will begin with chapters..."
- b. (2<sup>nd</sup> sentence, paragraph 2.J., page 5-5) "The request will be submitted in memo format..."

Do these examples say that these things "will" (might) happen, or "will" (must) happen? Suggest checking for "will," and re-wording into clearer, more definitive statements.

4. Avoid the word "may" which, like "will," is problematic because of its dual meanings. "May" can either give (or remove) permission (e.g., "Coast Guard units may [are authorized to] utilize...") or cite a possible future event (e.g., "Some DoD assignments used by Coast Guard units may [might] be classified..."). For example:

- a. (2<sup>nd</sup> sentence, paragraph 2.a., page 5-2) "Headquarters may task facilities with coordination of the appropriate Facility Manager."
- b. (3<sup>rd</sup> sentence, paragraph 7.B., page 7-2) "The sector may either complete the task (...), or direct its subordinate..."

Do these sentences state that Headquarters and sectors may [might] task or complete the task, or that Headquarters or sectors may [are authorized to] task or complete the task? Sticky notes provide suggested re-writes for some, but not all, "may" instances. Suggest reviewing and eliminating "may" (where possible) to help reduce confusion.

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## Appendix F: Sample RCM/PDO

### F.1. General

This appendix has samples of the following critical documents: request for commitment memorandum (RCM), and publication development order (PDO).

Use these samples when generating one of these documents.

### F.2. Request for Commitment

FC-P sends a request for commitment memorandum to selected offices requesting they commit personnel as IPT members for a given project (see below):

<b>U.S. Department of Homeland Security</b> <b>United States Coast Guard</b>		Commander United States Coast Guard Force Readiness Command	300 E. Main Street, Suite 1100 Norfolk, VA 23510 Staff Symbol: FC-P Phone: (757) 629-4463 Email: William.J.Wolter@uscg.mil
---	---	---	--

3120  
NOV 5 2012

**MEMORANDUM**

From: *W.J. Wolter* <sup>5/12</sup>  
W.J. Wolter, CAPT  
FC-P

Reply to: LT Nicole Seago  
Attn of: Nicole.L.Seago@uscg.mil

To: Distribution

Subj: REQUEST FOR COMMITMENT TO THE FORCECOM TALENT ATTRACTION INTEGRATED PROCESS TEAM

Ref: (a) Tactics, Techniques, and Procedures (TTP) Development System and Standards, CGTTP 1-01A  
(b) Civilian Hiring Guide for Supervisors and Managers, Version 2 of June 11, 2010, CG-121

1. In accordance with reference (a), one of Force Readiness Command's (FORCECOM's) functions is to facilitate the tactics, techniques, and procedures (TTP) development process. To perform this role, FORCECOM established a system that uses an Integrated Process Team (IPT), a cross-disciplinary team of stakeholders and subject matter experts (SMEs). This process is explained in enclosures (1) and (2). For the subject IPT, the integrator and content leader have developed a list of subject matter experts that includes one or more of your personnel (see enclosure (3)).

2. I request that supervisor's of all proposed IPT members review, complete, and return the task commitment form (enclosure (4)) no later than 09 Nov 2012, thereby agreeing to commit their participation on the FC Talent Attraction IPT.

3. The goal of this IPT is to identify TTP embedded in references (b) and develop a publication that furnishes division chief/manager level hiring guidance which supports relevant Coast Guard policy. The following are expectations for IPT members:

- a. All members: Participate in an initial alignment meeting (scheduled as required).
- b. Principal IPT members: Participate in conference call meetings, revise, test, and approve revisions to the TTP.
- c. Advisory IPT members: Participate as needed to revise, test, and approve revisions.

4. If you have any questions, please feel free to contact me directly. Thank you in advance for your commitment.

#

Enclosures: (1) FC Talent Attraction IPT Member Process Guide  
(2) Four Phases of the TTP Process (graphic)  
(3) FC Talent Attraction IPT Proposed Membership

This is the second page of a two-page request for commitment.

Subj: REQUEST FOR COMMITMENT TO THE FORCECOM  
TALENT ATTRACTION INTEGRATED PROCESS TEAM

3120  
NOV 5 2012

(4) Task Commitment Form

Dist: CG-121  
FC-A  
FC-ES  
FC-T  
LSC

2

**F.3. Task  
Commitment  
(TC)**

The request for commitment includes a partially completed TC as an enclosure. Recipients complete the remaining fields and return the TC to FC-P. A sample TC is shown below.

<b>TASK COMMITMENT</b>		
<b>TASK:</b> Participate in Integrated Process Team (IPT)		
<b>PROJECT:</b> Self Propelled Semi/Fully Submersible Vessel (SPSS/SPFS) TTP		
<b>INITIAL ALIGNMENT MEETING</b>	<b>DATE:</b> 16 Feb 2012	<b>LOCATION:</b> Video/Teleconference
<b>TEAM SCHEDULE:</b> Biweekly meetings/phone conferences and quarterly reviews beginning after the initial alignment meeting and continuing for the duration of the project.		
<b>INTEGRATOR:</b> LT Jason Mitchell	<b>CONTENT LEADER:</b> TBD	
<b>COMMITMENT TO PROVIDE IPT MEMBER(S):</b>		
My office, (insert unit here),		
commits the following personnel to serve on the integrated process team (IPT) for the above named project:		
<b>Name</b>	<b>Rank</b>	<b>Position</b>
<b>Comments:</b>		
<b>Signature of Person Authorized to Commit Members:</b>		
<b>FC-P APPROVAL:</b>		

Enclosure (2)

**F.4. Plan of Action and Milestones (POAM) Sample**

The POAM lists the major milestones, the responsible entity, and duration of each milestone.

<u>PLAN OF ACTION AND MILESTONES</u>		
<u>FORCECOM Talent Attraction: Civilian Hiring Guide TTP, FC TTP X-X.X</u>		
<u>Action Org</u>	<u>Milestone/Objective Description</u>	<u>Target Date</u>
IPT Members, Integrator, Editor	Initial alignment meeting to review TTP process, roles & approve POAM.	15 Nov <i>2012</i>
Integrator	Route draft of outline to IPT for coordinated approval. PDO routed to FC-P for signature.	22 Nov
IPT Members Integrator, Editor	Development of the author's draft.	15 Nov
IPT Members Integrator, Editor	Review and comment on author's draft. Adjudicate author's draft comments.	16 Nov - 7 Dec
Integrator, Editor	Development of the coordinated draft begins.	10 Dec - 14 Dec
IPT Members Integrator, Editor	Review and comment on coordinated draft	17 Dec - 25 Jan
IPT Members Integrator, Editor	Adjudicate coordinated draft comments. Development of the final coordinated draft begins.	28 Jan - 08 Feb
SST QA Editor	Final SST QA review & edits.	11 Feb - 15 Feb
IPT Members, Integrator, Editor	Approve final draft. Develop signature copy.	18 Feb - 08 Mar <i>2013</i>
IPT Members, Integrator, Editor	Route signature copy for signature by SES. Promulgate & add to FC SOP Library.	11 Mar -

*W*  
*2/13*

Enclosure (3)

**F.5.  
Publication  
Development  
Order  
(PDO)**

The publication development order (PDO) gives authority to develop a new Coast Guard TTP publication.

<b>U.S. Department of Homeland Security</b>		Commander United States Coast Guard Force Readiness Command	300 E. Main Street Norfolk, VA 23510 Staff Symbol: FC-P Phone: (757) 628-4463 Email: william.j.wolter@uscg.mil
<b>United States Coast Guard</b>			3120 31 Jan 13
<b>MEMORANDUM</b>			
From:	W. J. Wolter, CAPT FC-P	Reply to	LT Nicole Seago
To:	Distribution	Attn of:	Nicole.L.Seago@uscg.mil
Subj:	PUBLICATION DEVELOPMENT ORDER FOR FORCECOM TALENT ATTRACTION TACTICS, TECHNIQUES, AND PROCEDURES (TTP)		
Ref:	(a) Tactics, Techniques, and Procedures (TTP) Development System and Standards, CGTTP 1-01A (b) Civilian Hiring Guide for Supervisors and Managers, CG-121, Ver. 2, 11 June 2010		
<p>1. This Publication Development Order (PDO) directs the development of the FORCECOM (FC) Talent Attraction tactics, techniques, and procedures (TTP) and establishes authority for those processes and requirements necessary for the development, drafting and initial coordination of the TTP. Reference (a) provides detailed information on the Integrated Process Team (IPT) and the coordinated approval process used by Force Readiness Command (FORCECOM) to develop and approve TTP.</p> <p>2. The IPT works under the direction of the TTP Division Chief (FC-P). FC-P maintains oversight of all TTP projects, provides guidance to IPT members to ensure process integrity and quality control, and serves as signature authority for Coast Guard TTP.</p> <p>3. The FC Talent Attraction IPT shall comply with the provisions of this PDO and commence writing a draft of the sample TTP in accordance with the proposed enclosed timeline. Release of the TTP shall be coordinated to coincide with any revisions/updates to reference (b, as required).</p>			
Enclosures:	# (1) Publication Development Order (2) Proposed Outline (3) Plan of Action and Milestones (4) IPT Member List		
Dist:	CG-121 FC-A FC-ES FC-T LSC NORFOLK		

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## Appendix G: Security Classification Markings

**G.1. General** This appendix gives basic marking guidance to use when drafting or editing classified publications. The information in this appendix is not all inclusive. For more specific guidance and information, see The Coast Guard Correspondence Manual.

The Department of Homeland Security (DHS) Management Directive (MD) 11044, the “Protection of Classified National Security Information Classification Management,” implements the classification management portion of Executive Order 12958, Classified National Security Information.

---

**G.2. Front, Back Covers** Mark front/ back covers on classified publications per the guidance below.

---

**G.2.a. Overall Classification Markings** Mark a classified publication’s front and back cover with the highest, most restrictive classification (e.g., SECRET or CONFIDENTIAL) used anywhere inside the publication. Center the classification marking at the top and bottom of the page, in 26-point Arial bold typeface.

Do not mark unclassified publication covers.

---

**G.2.b. Foreign Government Releasability** Use the “REL TO” (Release To) marking for classified information deemed by the originator as releasable to the indicated foreign countries or international organizations.

If using REL TO, always place USA first, and at least one other country’s trigraph code (e.g., AUS, NZL, CAN, etc.). If including multiple countries, list them alphabetically after USA. If listing one or more international organization’s tetragraph codes (e.g., ACGU or CMFC) list them alphabetically following the country trigraph codes.

The REL TO marking indicates the information has been reviewed (adjudicated) and determined releasable to the country(ies) and/or international organization(s) indicated.

Here are two examples of correct REL TO use:

CONFIDENTIAL//REL TO USA, AUS, GBR

SECRET//REL TO USA, ACGU, CMFC

**NOTE:** **Do not use REL TO USA alone (e.g., SECRET//REL TO USA).**

G.2.b.(1). Portion Marking Use the following guidance if only certain paragraphs within the publication are releasable, but not the entire publication or an entire section, chapter, or appendix:

- Do not include the REL TO marking in headers/footers on the covers, or on any pages within the publication.
- Follow the guidance in Section G.7 on page G-5.
- Include a statement (similar to the following example) on the publication’s cover, following the “Declassify On” (or the “See title page for downgrading/declassifying information”) line:  
  
PORTIONS OF THIS PUBLICATION ARE RELEASABLE TO  
AUS, CAN, GBR, CMFC

---

G.2.c. Non-releasable Information When a publication has not been reviewed for foreign release, only the SECRET or CONFIDENTIAL classification is appropriate. This means the publication is for U.S. use only (//REL TO USA is not required).

---

G.2.d. Restrictive Caveats Per Director of Central Intelligence Directive (DCID) 6/6, “Security Controls on the Dissemination of Intelligence Information,” and DCID 6/7, “Intelligence Disclosure Policy,” “The NOFORN (not releasable to foreign nationals) caveat shall be used exclusively for intelligence information.”

---

**NOTE:** Do not use the “NOFORN” caveat unless information is known to have come from intelligence sources, or that an intelligence source was used to collect the information.

---

G.2.e. For Official Use Only (FOUO) Do not use the FOUO caveat on military technical manuals. DHS uses FOUO to identify unclassified information of a sensitive nature. The unauthorized disclosure of FOUO information could adversely affect a person’s privacy or welfare, the conduct of Federal programs, or other programs or operations essential to national interests. For further guidance, see Department of Homeland Security (DHS) Management Directive (MD) 11042.1, Safeguarding Sensitive but Unclassified (For Official Use Only) Information.

---

G.2.e.(1) FOUO-LES FOUO law enforcement sensitive (LES) is an FOUO classification to protect sensitive law enforcement information (e.g., tactics, weapons, etc.).

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G.2.f. Sensitive Security Information (SSI) SSI is sensitive, but unclassified information. 49 CFR Section 1520.5 defines SSI as “information obtained or developed in the conduct of security activities, including research and development, the disclosure of which DHS/TSA has determined would (1) constitute an unwarranted invasion of privacy (including, but not limited to information contained in any personnel, medical, or similar file); (2) reveal trade secrets or privileged or confidential information obtained from any person; or (3) be detrimental to the security of transportation.”

---

G.2.g. Limited Distribution (LIMDIS) Use the limited distribution (LIMDIS) statement to restrict or allow release of classified publications to foreign countries.

---

G.2.g.(1). Not Releasable to Foreign Nationals Use the following statement on all Coast Guard publications that are not releasable to foreign countries, regardless of classification:

DISTRIBUTION RESTRICTION: DISTRIBUTION AUTHORIZED TO THE DEPARTMENT OF DEFENSE (DOD) AND U.S. DOD CONTRACTORS ONLY FOR OPERATIONAL USE TO PROTECT TECHNICAL DATA OR INFORMATION FROM AUTOMATIC DISSEMINATION. THIS DETERMINATION WAS MADE ON \_\_\_\_\_ (Month/Year). OTHER REQUESTS SHALL BE REFERRED TO THIS PUBLICATION’S ORIGINATOR.

---

G.2.g.(2). Releasable to Foreign Nationals Use the following statement on all classified Coast Guard publications that are releasable to foreign countries:

DISTRIBUTION RESTRICTION: DISTRIBUTION AUTHORIZED TO THE DEPARTMENT OF DEFENSE (DOD), U.S. DOD CONTRACTORS, AND THE COUNTRIES OF \_\_\_\_\_, \_\_\_\_\_, AND \_\_\_\_\_ (spell out country names) FOR OPERATIONAL USE TO PROTECT TECHNICAL DATA OR INFORMATION FROM AUTOMATIC DISSEMINATION. THIS DETERMINATION WAS MADE ON \_\_\_\_\_ (MONTH, YEAR). OTHER REQUESTS SHALL BE REFERRED TO THIS PUBLICATION’S ORIGINATOR.

---

G.2.h. Derived From/Declassification Guidance All classified Coast Guard publications must include derived from/ declassification guidance on the front cover or in the promulgation letter.

Based on guidance found in the “Authorized Classification and Control Markings Register, Volume 1, Edition 2 (Version 1.2),” the following example shows the necessary information:

Derived from: Multiple Sources  
Declassify on: 31 May 2035

- Use “Multiple Sources” in the “Derived From” line, since most classified publications derive information from multiple sources.
- Add 25 years to the publication’s signature date for the declassification date (e.g., above, the publication was signed on 31 May 2010).

**G.2.i. Warning Notices**

---

Warning notices advise holders of classified publications that information of a “special status” is included in the publication, and requires additional protective measures (e.g., restrictions on reproductions, dissemination, or extraction). When appropriate, place one of the following warning notices on the front cover as indicated below:

- Reproduction requires approval of originator or higher DOD authority.
- Further dissemination only as directed by (insert command or official) or higher DOD authority.
- This document contains NATO classified information.

**G.3. Pages**

---

In a classified publication:

- Mark the pages according to the highest level of classification within that section, chapter, or appendix. Mark each page at the top (header) and bottom (footer), centered, with the highest classification spelled out. If a section, chapter, or appendix in a classified publication is wholly unclassified, mark each page only with “UNCLASSIFIED” in 12-point Arial bold typeface or equivalent.
  - For blank pages, include standard header, footer, and page number with the “This page intentionally left blank” statement, centered horizontally and vertically on the page, in 12-point Arial bold typeface.
  - For purposes of page classification, mark the title page or letter of promulgation according to the highest level of the publication’s classification. Unless there is classified material on the title page, mark the page “This page is UNCLASSIFIED,” in the footer, centered below the classification. Except for the covers, title page, and front and back cover change sheets, treat all other elements of a classified publication as individual chapters. Mark pages within a chapter according to the highest overall classification of the chapter’s contents.
  - Treat front matter elements (e.g., table of contents, list of illustrations, and preface) and final portions of a classified publication (e.g., list of acronyms and abbreviations, and list of effective pages) as individual chapters; mark pages according to their highest level of content.
-

**G.4. Publication Titles** All publication titles are unclassified. If a classified publication’s title is referenced (in the same publication or a different publication), follow the title with “(U)” (if the title is unclassified).

**G.5. Table of Contents** All TOC entries are unclassified.

**G.6. List of Illustrations** All lists of illustrations (if included) are unclassified (which requires that all figure titles also be unclassified).

**G.7. Paragraph Marking** Mark paragraphs in a classified section, chapter, or appendix as follows:

- Precede each unnumbered paragraph with one of the following classification markings (use the symbols shown in the table on the next page rather than spelling out the classification level):

Symbol	Meaning
(U)	Unclassified
(C)	Confidential
(C//REL)	Confidential; releasable to same countries and/or international organizations indicated in headers and/or footers
(C//REL TO XX, XX)	Confidential; releasable to countries and/or international organizations different from those indicated in headers/footers.
(S)	Secret
(S//REL)	Secret; releasable to same countries and/or international organizations indicated in headers and/or footers
(S//REL TO XX, XX)	Secret; releasable to countries and/or international organizations different from those indicated in headers/footers.

- Mark warnings, cautions, and notes with appropriate classification markings preceding the text in the same manner as paragraphs.

NOTE:

**In an entirely unclassified section, chapter, or appendix, do not mark individual paragraphs with a classification marking symbol.**

**G.8. Stand-Alone Paragraph Headings** Use the following guidance for marking stand-alone paragraphs in a classified section, chapter, or appendix:

- Ensure all paragraph headings stand alone without run-in text.

- Make paragraph headings unclassified and place “(U)” after the paragraph number, but preceding the heading, to indicate that paragraph heading’s classification (e.g., 1.2 (U) INTRODUCTION).

NOTE:

**In an entirely unclassified section, chapter, or appendix, do not mark paragraph headings with a classification marking symbol.**

---

### G.9. Lists

Do not give listed items a classification marking unless they form a complete idea that reveals classified information.

NOTE:

**A list of items consisting of only incomplete thoughts does not require a classification marking symbol; its classification level is included in the paragraph that introduces the list.**

---

### G.10. Figures

In a classified section, chapter, or appendix, center the figure classification (10-point Arial bold typeface, all capital letters) beneath the figure. Mark an unclassified figure in a classified section, chapter, or appendix as UNCLASSIFIED. However, in unclassified sections, chapters, or appendices, a figure classification is not required.

---

#### G.10.a. Figure Title Classification Markings

In a classified section, chapter, or appendix, create figure titles that are descriptive and unclassified. Place the appropriate classification marking between the figure number and its title (e.g., Figure 1-1. (U) Sample Checklists).

Do not mark figure titles in an unclassified section, chapter, or appendix with a classification-marking symbol.

---

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