

1 October 1997

SPECIALTY TRACK STUDY GUIDE

Plans and Programs Officer

FOREWORD

This guide will help prepare you for the responsibilities of a Civil Air Patrol (CAP) plans and programs officer, and is applicable to both the plans and programs officers at wing level and the director of plans and programs at region level.

The material is divided into sections for senior and master ratings. Progressively mastering the material will prepare you for positions of increasing responsibility. Study each part and practice applying the information to actual situations on the job. You may be assigned an on-the-job (OJT) training supervisor to assist you, but you should have no problem learning the job through self-study.

When you are convinced that you are proficient, consult your unit commander who must certify your personnel records before award of a rating.

The plans and programs officer requires a comprehensive knowledge of CAP organization, missions, goals and activities. This staff position can serve as a training ground for command positions. Most of the basic training for a plans and programs officer should be accomplished before the individual is appointed to the job.

There are only two skill levels in the plans and programs staff officer field. No technician rating has been established; therefore, this specialty track has no counterpart at squadron level. The planning duties at that level are accomplished by the squadron commander and staff. It is suggested that those officers who wish to enter this specialty should gain as much experience as possible at the squadron level in the three basic mission areas: emergency services, cadet programs, and aerospace education. A senior planner will normally hold the position of a group level plans officer or be an assistant plans officer at higher levels. The master planner will usually be the wing plans officer, region director of plans or national commander's staff advisor.

Supersedes CAPP 218, 30 November 1984. (See signature page for summary of changes.)

OPR: XP

Distribution: In accordance with CAPR 5-4; additional copies are purchase item only.

PLANS AND PROGRAMS OFFICER - TRAINING GUIDE

Senior Rating

1. Position Description. As senior planner, you will normally be assigned as a group plans officer or as an assistant plans officer at wing or higher level. As an assistant planner, your duties will consist of assisting the plans officer at the particular level assigned. The duties will be similar to those of the master planner except for the degree of authority and supervisory responsibilities involved. Your unit commander can certify your rating of senior, if you meet the requirements in paragraph 4, by annotating your CAP Form 45, *Senior Member Master Record*. Also, update the Specialty Training Track portion of the Senior Training Report (see CAPM 50-17, *CAP Senior Member Training Program*).

2. Objectives. To develop an understanding of the basic concepts of plans and programs, and to prepare a person to assume a position as a group plans officer or an assistant wing plans officer.

3. Functions and Responsibilities. At group level, the planner's job consists of coordinating activities of the various staff sections and assigned units in accomplishing goals and objectives set out by the group commander or higher headquarters. If wing were contemplating the construction of new wing headquarters building, various tasks would need to be accomplished by several of the staff sections, and each task should be completed in a workable sequence. It is the plans officer's job to develop a plan or program to accomplish the task and submit it to his or her commander for approval. As an example, a staff section would be designated to explore various locations and make some site evaluations. In the meantime, another staff agency would determine available funds to pay for the new building. For each of these tasks, it is the plans and programs officer's function to assign someone to the task, establish a suspense date to complete it, and follow-up to see how the job is coming along. Of prime importance, though, is obtaining the commander's approval prior to initiating all plans and programs and keeping the commander advised on a timely basis. The better relations the plans and programs officer maintains with fellow staff officers, the easier his or her job will be. But, the prime responsibility of the plans and programs officer is to get programs started and completed, and keep the commander informed of the progress of each program. Formats and checklists for basic planning can normally be found in most management textbooks, and these should be easily obtainable from the local library. Atch 1 is one example you might use. Formats of plans or programs the plans officer may have to write are aircraft purchase, open house

displays at various functions, cadet encampments, and unit expansion plans. In addition to basic planning, CAP plans and programs officers are normally responsible for the following functions:

a. Analyzing effectiveness of the CAP wing programs. As such, the plans and programs officer should:

- (1) Know the unit's goals and understand them.
- (2) Assign sub-goals to the staff and lower echelon units.
- (3) Keep track of how well everyone is doing.
- (4) Periodically report progress to the commander.

b. Analyzing problem areas for the commander. To do this, the plans and programs officer should:

- (1) Gather facts.
- (2) Make statistical analysis, if necessary.
- (3) Reach conclusions.
- (4) Report or recommend to commander.

c. Conducting policy meetings, such as commander's conferences. As a minimum, the plans and programs officer will be responsible for:

- (1) Preparing the agenda.
- (2) Structuring the conduct and format of the meeting.
- (3) Preparing minutes of meetings.

d. Any other special projects assigned by the commander.

4. Requirements:

a. Mandatory (before appointment as a plans and programs officer, senior rating):

- (1) Must be qualified at the master skill level in any specialty track, senior training program.
- (2) Must be qualified at the technician skill rating in at least one of three CAP mission areas: emergency services (operations), cadet programs, or aerospace education.
- (3) Must have completed Level II requirements, senior member training program.

b. Desirable:

- (1) Have a master rating in one of the three previously mentioned basic mission areas, and at least a technician rating in each of the other two basic mission areas.
- (2) Complete the ECI Squadron Officer School correspondence course.
- (3) Be familiar with CAP regulations and policies in addition to those of the three basic mission areas.

Master Rating

1. Position Description. In the master rating, you'll act as the plans and programs staff officer at wing or region staff level, or an assistant plans officer at wing or above. Your commander can certify your rating of master, if you meet the requirements in para 4, by annotating your CAP Form 45. Also, update the Specialty Training Track portion of the Senior Training Report (see CAPM 50-17).

2. Objectives. To prepare a person to assume a position as plans and programs officer at wing level or above.

3. Functions and Responsibilities. The job of a master planner at wing level or above is similar to that of the senior planner (group plans officer), but is of a much broader scope and is highly complex. Even though methods of doing the job are similar, a much broader knowledge of CAP and management is required due to the complexity of the planning, the amount of resources involved, and the echelons of command and outside agencies involved. Duties of a master planner include all those of a senior planner, those listed in CAPM 20-1, *Organization of Civil Air Patrol*, and duties assigned by his or her commander. Typical of the types of plans he or she may write as a master planner (wing, region, or national commander's advisory staff) are plans for wing/region conferences, hosting IACE cadets, operations, and any other projects assigned by the commander.

4. Requirements:

a. Mandatory (before appointment as a plans and programs staff officer, master rating):

(1) Must be qualified at the senior skill rating in the plans and programs specialty track, senior training program.

(2) Must be qualified at the master skill rating in any other specialty track, senior training program.

(3) Must be qualified at least at the technician skill level in two of three basic mission areas: emergency services, cadet programs, or aerospace education.

(4) Must be familiar with all of the basic regulations and functional areas of CAP.

(5) Must be an authority on the *Constitution and Bylaws of the Civil Air Patrol*, CAP organization, and CAP-USAF relationships.

(6) Must have completed Level III requirements, senior member training Program.

(7) Must display ability to perform assigned duties under all conditions.

b. Desirable:

(1) Have completed college level management courses.

(2) Have completed a college level course in statistics.

(3) Have completed the ECI Air Command and Staff College and the Air War College correspondence courses.

(4) Attendance at the CAP National Staff College is highly desirable.



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SUMMARY OF CHANGES

Removed text that no longer applies. Added guidance on updating the Senior Training Report.

NOTE: Changes from superseded publication are identified in this document by placing a bold vertical bar outside the appropriate margin.

A CHECKLIST TO TEST YOUR PLAN

(All of these questions are not applicable to all types of plans.)

1. Are the missions, tasks, and objectives clearly stated?
2. Have command and control relationships been clearly defined?
3. Have all organizations required to support the plan been properly tasked?
4. Are the assumptions used in the plan valid, reasonable, and necessary?
5. Has the plan been distributed to all organizations which need to prepare a support plan or know the information (down-up-lateral)?
6. Has coordination been effected between staff sections and units to assure that all agencies are aware of their responsibilities (down-up-lateral)?
7. Are staff officers familiar with the plan, and has it been exercised?
8. Do we have all of the people, equipment, materials, funds, and facilities necessary to carry out the plan? If not, have the proper people been advised so that corrective action is taken?
9. Are periodic checks made to assure that the people involved in the plan are aware of their responsibility and know what to do?
10. Have supporting plans, supplements, standing operating procedures, and checklists been prepared at all echelons of command for plan execution?
11. Has a schedule for review and update of the plan been established?
12. Has the schedule for reviewing and updating been complied with?
13. Was prior coordination made with tasked and affected units?
14. Have tasked and affected units agreed to provide support required of them?
15. Have deficiencies been identified?
16. If people or equipment of other units have been tasked beyond present capabilities, what alternative action is being taken to meet requirements of the plan?
17. If new facilities are required before the plan can be executed, have target dates for completion been established or alternative solutions proposed?
18. Does the plan make provisions for current corporate policy consideration and constraints?