

**Summary Report for Individual Task  
805A-36A-8003  
Implement FM Planning and Operations  
Status: Approved**

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DESTRUCTION NOTICE: None

**Condition:** You are serving as the FM Support Operations (SPO) Officer within the Sustainment Brigade. You have access to FM 1-06 (Financial Management Operations), FM 3-0 (Operations), FM 4-0 (Sustainment), FM 4-94 (Theater Sustainment Command), ADP 5-0 (The Operations Process), FM 5-19 (Composite Risk Management), and Joint Publication 5-0 (Joint Operation Planning). This task should not be trained in MOPP.

**Standard:** You must perform the following measures to receive a GO during your evaluation: 1. Establish FM inputs to the Military Decision Making Process (MDMP) or Joint Operations Planning Process (JOPP). 2. Complete the FM Planning Process.

**Special Condition:** None

**Safety Level:** Low

**MOPP:** Never

<b>Task Statements</b>
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**Cue:** None

<b>DANGER</b>
None

<b>WARNING</b>
None

<b>CAUTION</b>
None

**Remarks:** None

**Notes:** None

### Performance Steps

1. Coordinate FM inputs to Military Decision Making Process (MDMP) or Joint Operations Planning Process (JOPP).
  - a. Assess the current situation from an FM perspective.
  - b. Forecast FM requirements.
  - c. Assess FM unit/system capabilities, limitations, and employment.
  - d. Identify risk and mitigation strategy.
  - e. Determine FM organizations for operations, command, and support relationships.
  - f. Determine general locations and movements of FM units.
  - g. Synchronize FM operations with sustainment requirements.
2. Implement FM MDMP or JOPP.
  - a. Receive the Mission/Initiate Planning.
    - (1) Receive orders and guidance from higher headquarters or a new mission anticipated by the commander.
    - (2) Receive the commander's initial guidance and a decision to conduct initial planning, to include timelines.
    - (3) Integrate the Composite Risk Management (CRM) process as part of each phase of the operations planning process.
  - b. Conduct Mission Analysis.
    - (1) Identify how the commander's intent focuses FM support efforts to subordinate units.
    - (2) Analyze the unit and system capabilities, limitations, and employment.
    - (3) Analyze the Task Organization to determine the command support relationship for FM support.
    - (4) Analyze the organization of the unit for FM operations and how manpower allocations will be made to subordinate units.
    - (5) Analyze personnel strength data to determine current capabilities and project future requirements.
    - (6) Analyze unit strength maintenance, including monitoring, collecting, and analyzing data affecting Soldier readiness.
    - (7) Determine FM support and FM services available to the force (current and projected).
    - (8) Analyze command and support relationships, to include FM units and supported organizations and how these relationships affect the delivery of FM support.
    - (9) Analyze resource allocation and employment synchronization of organic and supporting units.
    - (10) Analyze locations and movement of FM units.

- (11) Analyze current and near-term (future) execution of the planned FM support.
- (12) Update the running estimate.
- (13) Analyze the unit mission and the mission of supported and supporting units.
- (14) Analyze Theater-level FM considerations.
- (15) Identify key specified, implied and essential tasks.
- (16) Identify constraint and limitation impacts which affect FM operations.
- (17) Identify FM key facts and assumptions.
- (18) Prepare, authenticate, and distribute the FM plan in the form of approved annexes, estimates, appendices, orders and OPLANS.
- (19) Identify recommended CCIRs and status of essential elements of friendly information.
- (20) Issue/receive warning order update.

c. Course of Action (COA) Development.

- (1) Develop a broad operations and sustainment concept.
- (2) Revise planning guidance, as necessary.
- (3) Determine FM resources required to support each COA.
- (4) Review each COA to ensure support of the commander's intent.
- (5) Determine and refine casualty estimations for each COA.
- (6) Ensure FM capabilities, strengths, and FM asset vulnerabilities are considered.
- (7) Ensure deployment, intra-theater transit or movements, and redeployment are considered.
- (8) Ensure current and future FM operations are included in COA.

d. COA Analysis and Wargaming.

- (1) Refine the status of all FM friendly forces.
- (2) List critical FM events during war gaming.
- (3) Analyze how FM events will be evaluated.
- (4) Analyze the potential decision points, branches, or sequels.
- (5) Analyze the results of the war gaming (from an FM perspective).

e. Compare COAs.

- (1) Refine COAs based on war game results.
- (2) Compare relative success of achieving FM success by each COA.
- (3) Analyze the advantages and disadvantages of each COA.
- (4) Analyze any critical areas of FM support which may impact on each COA, if any.
- (5) Analyze major deficiencies in manpower or in number of FM units, teams, or squads.
- (6) Recommend the best COA from an FM perspective.

f. Approve COAs.

- (1) Select best COA and modify as necessary.
- (2) Refine commander's intent, CCIRs, and essential elements of friendly information.
- (3) Issue the Warning Order.

g. Orders Production, Dissemination, and Transition.

- (1) Prepare OPORD.
- (2) Prepare FM Appendix to the Sustainment Annex.

(Asterisks indicates a leader performance step.)

**Evaluation Guidance:** Score the Soldier GO if all performance measures are passed (P). Score the Soldier NO GO if any performance measure is failed (F). If the Soldier fails any performance measure, show what was done wrong and how to perform it correctly.

**Evaluation Preparation:** This task can be evaluated by use of the performance measures as listed. This method of evaluation is appropriate if the Soldier performs the task on the job. Allow the Soldier to practice until the Soldier feels qualified and prepared for the evaluation. Then have the Soldier perform the task, using the materials listed in the CONDITIONS statement above. Score the Soldier "PASS" or "FAIL" as determined by the performance.

PERFORMANCE MEASURES	GO	NO-GO	N/A
1. Coordinated FM inputs to MDMP or JOPP.			
a. Assessed the current situation from an FM perspective.			
b. Forecasted FM requirements.			
c. Assessed FM unit/system capabilities, limitations, and employment.			
d. Identified risk and mitigation strategy.			
e. Determined FM organizations for operations, command, and support relationships.			
f. Determined general locations and movements of FM units.			
g. Synchronized FM operations with sustainment requirements.			
2. Implemented FM MDMP or JOPP.			
a. Received the mission/initiated planning.			
b. Conducted mission analysis.			
c. Developed COAs.			
d. Analyzed and wargamed COAs.			
e. Compared COAs.			
f. Approved COAs.			
g. Produced orders, disseminated, and transitioned.			

**Supporting Reference(s):**

Step Number	Reference ID	Reference Name	Required	Primary
	ADP 3-0	Unified Land Operations	No	No
	ADP 5-0	The Operations Process	No	No
	ADRP 4-0	Sustainment	No	No
	FM 1-06	Financial Management Operations	No	No
	FM 4-94 (Superseded by ATP 4-94, 28 JUNE 2013)	(Superseded by ATP 4-94, 28 JUNE 2013) Theater Sustainment Command	No	No
	FM 5-19	COMPOSITE RISK MANAGEMENT	No	No
	JOINT PUB 5-0	Joint Operation Planning	No	No

**Environment:** Environmental protection is not just the law but the right thing to do. It is a continual process and starts with deliberate planning. Always be alert to ways to protect our environment during training and missions. In doing so, you will contribute to the sustainment of our training resources while protecting people and the environment from harmful effects. Refer to FM 3-34.5 Environmental Considerations and GTA 05-08-002 ENVIRONMENTAL-RELATED RISK ASSESSMENT.

**Safety:** In a training environment, leaders must perform a risk assessment in accordance with FM 5-19, Risk Management. Leaders will complete a DA Form 7566 COMPOSITE RISK MANAGEMENT WORKSHEET during the planning and completion of each task and sub-task by assessing mission, enemy, terrain and weather, troops and support available-time available and civil considerations, (METT-TC). Note: During MOPP training, leaders must ensure personnel are monitored for potential heat injury. Local policies and procedures must be followed during times of increased heat category in order to avoid heat related injury. Consider the MOPP work/rest cycles and water replacement guidelines IAW FM 3-11.4, Multiservice Tactics, Techniques, and Procedures for Nuclear, Biological, and Chemical (NBC) Protection, FM 3-11.5, Multiservice Tactics, Techniques, and Procedures for Chemical, Biological, Radiological, and Nuclear Decontamination.

**Prerequisite Individual Tasks :** None

**Supporting Individual Tasks :**

Task Number	Title	Proponent	Status
805A-36A-7018	Develop FM Planning and Operations	805A - Financial Management (Individual)	Proposed

**Supported Individual Tasks :** None

**Supported Collective Tasks :**

<b>Task Number</b>	<b>Title</b>	<b>Proponent</b>	<b>Status</b>
14-8-0001	Evaluate Current Financial Management Support Force Requirements	14 - Finance (Collective)	Approved