

Report Date: 26 Feb 2014

**Summary Report for Individual Task
805A-36A-6014
Conduct FM Planning and Operations
Status: Approved**

DISTRIBUTION RESTRICTION: Approved for public release; distribution is unlimited.

DESTRUCTION NOTICE: None

Condition: You are assigned as the company Executive Officer and your unit is scheduled to deploy in support of full spectrum operations. The Company Commander and Operations Sergeant Major have called a meeting to begin the deployment planning process. You have access to FM 1-06 (Financial Management Operations), FM 5-19 (Composite Risk Management), and FM 5-0 (The Operations Process). This task should not be trained in MOPP.

Standard: You must complete the following measures without error: (1) Receipt of mission (2) Mission analysis (3) Course of Action (COA) Development (4) COA analysis (5) COA comparison (6) COA approval (7) Orders production, dissemination, and transition.

Special Condition: None

Safety Level: Low

MOPP: Never

Task Statements

Cue: None

DANGER
None

WARNING
None

CAUTION
None

Remarks: None

Notes: None

Performance Steps

1. Receive of Mission.

- a. Receive orders, and guidance from higher headquarters or a new mission anticipated by the commander.
- b. Receive the commander's initial guidance and a decision to conduct initial planning, to include timelines. This step concludes with a warning order to the staff or subordinate units.
- c. Ensure the Composite Risk Management (CRM) process is included as part of each phase of the operations planning process.

2. Mission Analysis.

- a. Identify how the commander's intent focuses FM support efforts. This should not be tied to a specific course of action.
- b. Evaluate Unit and system capabilities, limitations, and employment. This includes the ability to access voice and data systems for FM and C2.
- c. Evaluate Task Organization to determine command support relationship for FM support.
- d. Evaluate Organization of the unit for FM operations; how manpower allocations will be made to subordinate units.
- e. Analyze FM personnel strength data to determine current capabilities and project future requirements.
- f. Analyze unit strength maintenance, including monitoring, collecting, and analyzing data affecting Soldier readiness.
- g. Prepare estimates for personnel replacements requirements, based on estimated casualties, non-battle losses, and foreseeable administrative losses to include critical military occupational skill requirements.
- h. Update the running estimate.
- i. Identify unit mission and the mission of supported and supporting units.
- j. Identify key specified and implied FM tasks and determine which tasks are essential.
- k. Identify constraints and limitations and how they affect FM end state.
- l. Identify FM key facts and assumptions.
- m. Identify recommended CCIRs and status of essential elements of friendly information.
- n. Issue/receive warning order update.

3. Develop Course of Action Development.

- a. Develop of a broad concept of operation and sustainment concept.
- b. Revise planning guidance as necessary.
- c. Determine FM resources required to support each COA.

- d. Review each COA to ensure it supports the commander's intent.
 - e. Ensure FM capabilities, strength impacts, and FM asset vulnerabilities are considered.
 - f. Ensure current and future FM operations are included in COA.
 - g. Ensure the Composite Risk Management process is included in COA development.
4. Perform Course of Action Analysis.
- a. Refine the status of all FM friendly forces.
 - b. Inventory critical FM events in war gaming.
 - c. Determine how FM events will be evaluated.
 - d. Determine potential decision points, branches, or sequels.
 - e. Assess the results of the war gaming (from an FM perspective).
5. Refine Course of Action Comparison.
- a. Refine COAs based on war game results.
 - b. Compare relative success of achieving FM success by each COA.
 - c. Identify the FM advantages and disadvantages of each COA.
 - d. Identify any critical areas of FM support which may impact on each COA, if any.
 - e. Identify major deficiencies in manpower.
 - f. Ensure the Composite Risk Management process is included in COA comparison.
 - g. Recommending the best COA from an FM perspective.
6. Select Course of Action Approval.
- a. Select best COA; modify FM support as necessary to support.
 - b. Refine the commander's intent, CCIRs, and essential elements of friendly information.
 - c. Issue the Warning Order.
7. Prepare Orders.
- a. Prepare OPORD.
 - b. Prepare input to the Sustainment Annex including but not limited to the following items.
 - (1) Personnel Readiness Management.

- (a) Personnel augmentation and manning requirements- stop-move.
 - (b) Priority of fill.
 - (c) Individual Soldier readiness.
 - (d) Cross-leveling.
 - (e) Key leader/crew replacements.
- (2) Personnel Accountability.
- (a) System of record.
 - (b) Initial manifesting/processing.
 - (c) Guideline for reporting.
 - (d) Accountability of contractors and other civilians.
- (3) Strength Reporting.
- (a) Timeline reporting format for PERSTAT.
 - (b) Timeline reporting format for JPERSTAT.
- (4) Essential Personnel Services.
- (a) ID cards/tags.
 - (b) Awards authority and processing.
 - (c) Promotion processing.
 - (d) Military pay/entitlements.
 - (e) Personnel action requests.
 - (f) Leaves and passes; R&R guidance and allocation by subordinate unit.
 - (g) Evaluation reports.
 - (h) Line of Duty Investigations.
 - (i) Other EPS functions as necessary.
- (5) Postal Operations.
- (a) Initial restrictions.

(b) Addresses; supporting postal organization.

(c) Scheduled delivery/retrograde.

(d) Casualty mail.

(6) Morale, Welfare, and Recreation Operations.

(a) ARC support/procedures and processing.

(b) In-country MWR support.

(c) AAFES support).

(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. Received the Mission.			
2. Performed Mission Analysis.			
3. Developed Course of Action Development.			
4. Performed Course of Action Analysis.			
5. Refined Course of Action Comparison.			
6. Selected Course of Action Approval.			
7. Prepared Orders.			

Supporting Reference(s):

Step Number	Reference ID	Reference Name	Required	Primary
	FM 1-06	Financial Management Operations	No	No
	FM 5-0	(Superseded 17 May 2012 by ADP 5-0) THE OPERATIONS PROCESS	Yes	No
	FM 5-19	COMPOSITE RISK MANAGEMENT	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. 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 of 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.

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. Everyone is responsible for safety. A thorough risk assessment must be completed prior to every mission or operation.

Prerequisite Individual Tasks : None

Supporting Individual Tasks : None

Supported Individual Tasks :

Task Number	Title	Proponent	Status
805A-36A-8003	Implement FM Planning and Operations	805A - Financial Management (Individual)	Approved

Supported Collective Tasks :

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

ICTL Data :

ICTL Title	Personnel Type	MOS Data
ICTL International Military Student PreCourse	Enlisted	MOS: 000, Skill Level: SL5
36A - Financial Manager - LT	Officer	AOC: 36A, Rank: LT