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## The Canadian Forces Operational Planning Process (OPP)

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**Contact Officer: CFEC Joint Doctrine Branch  
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## PREFACE

1. The original version of this publication evolved from the Canadian *Force Employment Manual (FEM)*, B-GG-005-004/AF-004, that was conceptualized in the early 1990's. It was clear that a common operational planning process was required throughout the Canadian Forces and this process was codified in the manual. Many joint operations were conducted in the intervening years and both NATO and the United States had more fully developed their own operational planning processes. By mid-2000, the FEM was in need of a thorough update. The CF Operational Planning Process (OPP), B-GJ-005-500/FP-000 was published in November 2002 as a result of this update.
2. Since the original publication of this document, OPP has become an integral part of planning for operations within the CF and it has been successfully inculcated into the CF culture. As this has occurred, the CF has also undergone significant changes that require amendments to this manual to reflect new structures and organizations for the command and control of CF operations. To be clear, the basic principles of OPP remain unchanged. Although there has been much recent discussion concerning new planning concepts such as Strategic Operational Design and the Effects Based Approach to Operations, these concepts are not yet mature enough to be written into doctrine. Change 1 to this publication is concerned with reflecting new CF structures and organizations and incorporating modifications to OPP to reflect a whole of government approach that will start setting the stage for effects based planning within a comprehensive approach.
3. The chapter on risk management has been removed in favour of a more extensive integration of risk management into the CF operational planning process. The techniques presented in this publication mirror those in B-GJ-005-502/FP-000, Risk Management for CF Operations. The two manuals should be used in conjunction with each other to ensure a full understanding of both the CF operational planning process and risk management.
4. This manual is intended to guide operational planning in the Canadian Forces. It represents the idealized process. Units and formations will tailor it use to their specific needs with their standing operations procedures. As doctrine, this manual is authoritative but the processes require judgement in application.

M.J. Ward  
Major-General

Chief of Force Development

## FOREWORD

1. The manual sets out the Canadian Operational Planning Process. It is intended to guide:
  - a. commanders and their staffs at the strategic and operational levels;
  - b. task forces established for routine and contingency operations, as well as all formations and agencies supporting such operations;
  - c. formations conducting training and force generation activities in support of operations; and
  - d. command and staff colleges and other teaching institutions within the framework for officer professional development.
2. This manual is has three main parts: an introduction including strategic planning, campaign planning, and operational planning including staff duties. Chapter One outlines the boundaries of the planning environment and Chapter Two, details aspects of campaign planning. The third part, which covers Chapters Three, Four and Five gives an overview of operations planning, describes the application of the process in detail at the operational level and includes the staff duties required in preparing operational plans.
3. This manual is to be used in conjunction with CF Operations, B-GJ-005-300/FP-000 and other manuals. It supersedes the Force Employment Manual, B-GG-005-004/AF-004 June 1998. It is the keystone-planning manual in the Canadian Forces Doctrine Hierarchy. It closely aligns with the process described in the NATO Bi-Strategic Commands Guidelines for Operational Planning (GOP) Aug 2000 version and is similar to the United States Joint Operational Planning Process used in their Rapid Response Action Planning environment.
4. Comments and recommendations for changes should be forwarded to the contact officer: CFEC Joint Doctrine Branch.
5. The Chief of Force Development is the ratification authority for this doctrine.

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**CHAPTER 1**  
**INTRODUCTION**  
**SECTION I - GENERAL**

**101. CF PLANNING**

1. The CF Force Employment (FE) process includes all activities required to plan, conduct and review CF operations. The activities inherent to the FE process are independent of organization or command level. Commanders and staffs at the operational level headquarters plan and conduct routine and contingency operations on behalf of the Chief of Defence Staff (CDS). On behalf of the CDS, the Canadian Forces Operational Commanders are designated specific areas of responsibility for the planning and conduct of operations and for passing CDS direction to subordinate commanders. The Environmental Chiefs of Staff (ECS) are wholly responsible and accountable to the CDS for force generation activities including training for operations.

2. Planning Operations. The process used to prepare plans and orders for CF force employment is called the CF Force Employment Planning Process (CF FEPP). An overview of this process is provided later in this chapter. The process used to prepare plans and orders for CF operations is called the CF Operational Planning Process (CF OPP). The details of this process constitute the bulk of this manual. This planning process is applicable to all aspects of the employment of military force not just war fighting.

**102. COMMAND AND OPERATIONAL PLANNING**

1. The exercise of command (defined in B-GJ-005-300/FP-000 - *CF Operations*) is the most important activity in the CF, whether in peace or in conflict, throughout the continuum of operations. Of itself, command will not ensure success or victory. It will not drive home a single attack, destroy an enemy target, carry out an emergency re-supply nor conduct a campaign. At the same time, no operation will be successful without effective command.

2. Command can be described by two closely intertwined definitions. First, as a noun, it is defined as the authority vested in an individual of the armed forces for the direction, coordination and control of military forces. Second, as a verb, it entails the action of *exercising* that command. This makes it uniquely human and highlights the importance of the commander in all activities within a military force relating to its employment. Therefore, the commander has a unique responsibility to the military force assigned and for this reason CF doctrine espouses a command-driven philosophy in all aspects of FE.

**103. AUTHORITY, RESPONSIBILITY AND ACCOUNTABILITY OF THE COMMANDER**

1. Command is vested in an individual who has total responsibility. Commanders possess authority and responsibility concerning their assigned forces and are accountable, while in command, to their superiors. This chain of accountability extends at all levels of the organization, up to and including that of the CDS to the Minister and Government, and their responsibilities to Parliament and the country. Command can be described as the art of decision-making, leading and motivating subordinates and their forces into action to accomplish missions at the least expense of manpower and materiel. The essence of command is defined by commanders' competence, intuition, judgement, initiative and character and their ability to inspire and gain the trust of their subordinates.

2. All members of the CF, as individuals, are responsible for their actions and the direct consequences of those actions. This is a basic legal precept. Commanders have a responsibility to make decisions, issue orders, prepare their forces for operations and monitor the execution of assigned tasks. Consequently, they must provide their subordinates with the necessary guidance and resources to fulfil their mission. These are the basic duties of command and they are directly applicable to the FE process. Consequently, commanders are responsible for the health, welfare, morale and discipline of their personnel, as well as the state of the equipment within their command.

3. Commanders derive their authority from many sources. Authority gives them the right to make decisions, transmit their intentions to subordinate commanders as orders and the responsibility to use the power of command. Ultimately, commanders possess the freedom and duty to enforce discipline and impose their will on subordinates.

4. Within the CF, commanders may be delegated authority and resources. Together with these command responsibilities, commanders accept the additional burden of accountability to both their superiors and the nation, for the actions of their subordinates. Accountability is the complement of authority and it can never be delegated. Regardless of the level of command, the precepts of responsibility, authority and accountability ultimately affect the lives of everyone under a commander's command.

5. Commanders at all levels must lead in conditions of risk, violence, fear and danger. They must consistently make decisions in a climate of uncertainty, while constrained by time. Successful commanders must be able to function effectively in conditions of confusion and disorder. Further, they must adapt and thrive under circumstances of complexity, ambiguity and rapid change. Commanders must base their decisions on the best information available at the time the decision is needed.

6. The CF represent Canada overseas and are a mirror for Canadians on domestic operations. Public Affairs is therefore an important element in the planning and conduct of an operation. Whether at home or overseas, Canadians are interested in CF personnel and their activities and commanders have a responsibility to keep them informed. Commanders must therefore ensure that accurate and timely information, consistent with operational security, is made available to the Canadian public.

#### **104. COMMAND ORGANIZATION AND PLANNING**

1. A commander needs support to exercise command effectively. This support may include personnel who assist the commander in the exercise of command (staff), robust communications and information systems (CIS), a secure working environment and standard procedures.

2. In contemporary operations, a superior commander is incapable of exercising control alone. At most levels, staffs exist to assist and support the commander. The staffs have no authority by themselves; they derive authority from the commander and exercise it in his name. Therefore, all of their activities are undertaken on the commander's behalf.

3. The CF approach to force employment and operations is command driven. Part of this encompasses the requirement to plan for operations. In this regard, because of the responsibility, authority and accountability inherent to the position, a commander has unique tasks to perform throughout the planning process. For instance, commanders must participate in mission analysis, identify their critical information requirements and provide planning and risk guidance to the staff. In simple terms, the commander must arrive at a functional solution within certain time constraints despite being faced with varying situations, which are often complex and ambiguous. The staff is organized and their efforts focused and synchronized, to assist the commander throughout the decision making process.

#### **105. GOVERNMENT POLICY**

1. The decision to use the Canadian Forces, whether at home or abroad, always rests with the Government of Canada. It is one of the most serious decisions that a government can make.

2. Since the end of the Cold War, and the attacks of 9/11, the planning environment for the Canadian Forces has become considerably more complicated. Owing to this, Canada has opted for a 'whole of government' approach to situations that might involve Canadian resources, including the Canadian Forces. The premise of the plan is that situations that present a variety of problems will require a multi-pronged solution. Success will turn on coordination - the Government of Canada's ability to bring its resources to bear on the problem to best effect. Those resources are not strictly military. The

Canadian government of the day might well seek to focus on economic sanctions and diplomatic actions to resolve a particular situation.

## **106. STRATEGY**

1. Strategy is a concept for linking means to ends. Policy defines the end state, while strategy outlines the plan. Strategy therefore links policy to specific activities. Policy is the province of national policy makers and involves the application and coordination of all elements of national power – diplomatic, informational, military and economic – toward the achievement of national aims and objectives. Strategy is the concept that links available national resources to government ends - over time, and as circumstances change. For the Department and the Forces, strategy is about how to use our resources to best support the government's aims.

2. Strategy finds its test at the operational level. For the Canadian Forces, this level deals with the joint employment of land, maritime and aerospace forces employed in sequential and simultaneous engagements that are linked by design in a campaign plan.

3. NATO defines a campaign as “a set of military operations planned and conducted to achieve a strategic objective within a given time and geographical area, which normally involve maritime, land and air forces.” Campaigns are often characterized as major operations. To achieve the end state, a single campaign may not be sufficient. In this case, several campaigns will be waged sequentially or simultaneously.

## **107. OPERATIONAL ART**

1. Conflict is a human activity that is conducted under conditions of imperfect knowledge by multiple participants who act concurrently and react specifically against perceptions of probable actions and results of actions. Conflict is therefore a non-linear phenomenon wherein inputs have disproportionate outputs. Its manifestations are inherently confusing and complex and tend to appear chaotic. The history of command and planning has been one of dealing with what Clausewitz called this “friction” and “fog of war”. Operational art is the term used to describe the faculty required to deal with this situation.

2. Art is defined as, “The skill of employing military forces to attain strategic objectives in a theatre of war or theatre of operations through the design, organization and conduct of campaigns and major operations.” (source - DTDB)

3. Command and control within a seemingly chaotic environment requires a search for and an understanding of patterns. An aid to basic understanding of such patterns within conflict has been the listing of certain “principles”. The “Principles of War” are an important attempt to identify the more consistent patterns within the framework of military conflict. In the exercise of operational art there are three principles of war that are especially relevant to campaigning: selection and maintenance of the aim, concentration of force, and economy of effort.

4. These principles are particularly important because the “artisanship” of operational art exists in the ability to translate strategic direction into tactical action. This is a command ability that requires a high degree of professional acumen and sufficient knowledge of the situation to be able to set military strategic objectives and to employ forces tactically to achieve those objectives. This ability governs the deployment of forces, their commitments to or withdrawal from battle and the sequencing of successive operations to attain the overall military strategic objective. It is an art that requires a high professional faculty for determining achievable military goals and a broad creative aptitude for the imaginative use of resources and capabilities to achieve these goals at minimum cost.

5. The campaign commander therefore employs operational art in designing, commanding and conducting a campaign. Operational art and the operational level of war are not synonymous. Operational art refers to the ingenuity of a commander in the design and execution of campaigns. So while operational art is not the exclusive province of a specific level of conflict it does require a level of

command capable of exercising the authority and skill required to determine when, where and for what purpose forces will or will not fight. Like the term “campaign”, it therefore remains most associated with theatres of war, theatres of operations, and joint operations areas. Given the nature of future conflict and the growing tendency of asymmetric warfare to compress the strategic-operational-tactical spheres, the operational level of conflict will always see the requirement for operational art but the requirement for the employment of operational art itself will transcend levels of conflict.

6. Operational art requires the ability to visualise the synergistic effects of all available capabilities in the achievement of the strategic goal. The operational level of conflict is the joint synchronization level of conflict. It is therefore vitally important that all components be focused on the overall joint objective. Thus the designation of where force must be concentrated must be understood by all components: land, maritime, aerospace, and special forces. Each component must be constantly aware of the main effort for the overall operation and for each phase of the operation. Similarly, a designation of a main effort by phase makes understanding who is a supported commander and who is a supporting commander quite clear while maintaining operational focus on achieving the overall strategic goal. This synchronization is made possible through a campaign plan that employs an operational design founded upon common operational concepts.

## SECTION II - CF OPERATIONS

### 108. INTRODUCTION

1. A CF Operation is defined as the employment of an element or elements of the CF to perform a specific mission. Meanwhile Force Employment is defined, at the strategic level, as the application of military means to achieve specified objectives or effects through such activities as operations, defence diplomacy, and unilateral, bilateral or multilateral defence activities. CF operations are enhanced when environmental components operate in concert or jointly. For instance, close air support operations require close cooperation and planning between land and air components. When participating in allied or coalition operations CF elements will typically be operating in a joint environment.

2. There are two categories of CF operations:

- a. **Routine Operations.** Routine operations are force employment activities that are normally recurring in nature and can usually be planned for and programmed.
- b. **Contingency Operations.** Contingency operations are deliberate operations planned in advance of known events or events that could reasonably be expected, thereby permitting a relatively formal planning process. Contingency operations can be conducted either domestically or internationally. If an operation does not clearly fall into the routine category, then it is a contingency operation and a grouping, specifically tailored to the operation is generated. Contingency operations may be planned in either a deliberate or rapid response mode. Any grouping created for a contingency operation, regardless of size, is called a **Task Force (TF)**. If more than one service is involved in the operation it will be called a **Joint Task Force (JTF)**. In this manual when the term TF is used it implies both.

### 109. DOMESTIC OPERATIONS

1. Domestic operations of either category are initially conducted by one of the regional JTF formations: JTF(Pacific), JTF(Western), JTC(Central), JTF(Quebec), JTF(Atlantic), or JTF(North).

2. **Routine Operations.** Routine operations are those that fall within the delegated authority of the operational commander (for example, Comd JTF(Atlantic)) and can be conducted with the resources integral to the formation. In routine operations, TFs are formed and Task Force Commanders (TF Comds) are normally appointed on the initiative of the operational commander. In this case, the TF Comd reports to the tasking formation.

3. **Contingency Operations.** There will be times when a domestic contingency operation is beyond the capabilities of a single regional JTF. The response to such operations will often be based on Contingency Operation Plans (CONPLANS) that are prepared and controlled by the Commander Canada COM, on behalf of the CDS. The designated TF Comd will report to the CDS through the Comd Canada COM. Any component of the CF may be employed on domestic contingency operations depending on the situation. In such a scenario, Canada COM would determine the capabilities that are required for the operation and these capabilities would be transferred from their parent ECS or Level 1 to Canada COM on authority of the CDS for the duration of the situation or emergency.

4. **Transitions.** As a routine operation develops, there may be indicators that it will soon overwhelm the capabilities of the initiating commander. Canada COM monitors all routine operations to ensure that when support is requested or the limit of authority is insufficient, supplementary orders are issued to designate the operation as a contingency and to establish the necessary structure and chain of command to resolve the situation.

## 110. INTERNATIONAL CONTINGENCY OPERATIONS

1. Commanders and their staffs must be able to plan, conduct and review military operations either unilaterally or with allied or coalition forces. Consequently, it is important that the force employment process for major operations feature commonality with our allies. In producing this manual, operational planning concepts and processes used in NATO and by key allies were examined and taken into consideration. There are some new concepts that are being developed within Canada and by NATO and our key allies such as the Effects Based Approach to Operations, the Comprehensive Approach and Strategic Operational Design. While these new concepts promise excellent advances in planning methodology and the execution of operations, they have not matured to the point where they supersede the process and principles depicted in this manual. When the concepts mentioned have matured, they will be included in this manual.

## 111. PRINCIPLES OF CF OPERATIONS

1. The planning and control functions of NDHQ in operations should be confined, as far as practicable, to the strategic-level, leaving operational activities to the Operational Commands and tactical activities to subordinate commanders.

2. The Operational Commander is responsible for determining and stating the operational requirements, in terms of capabilities, to support his concept of operations (CONOPS). The statement of operational requirements (SOR) includes the requirement for multi-domain capabilities in the functions of command, sense, act, shield, and sustain. Where the Operational Commander's requirements exceed those initially apportioned or allocated by the CDS, securing these resources must be addressed during the planning process as part of an SJS-led coordination of force generation.

## 112. PHASES OF AN OPERATION

1. CF operations are generally conducted in five (5) phases. These phases are:

- a. warning,
- b. preparation,
- c. deployment,
- d. employment, and
- e. redeployment.

2. **Warning.** The warning phase begins once DND comes to believe that CF participation in a new operation might be a possibility, owing to events on the ground (either and home or abroad) and government consideration of a response. During this phase, the CDS will issue an Initiating Directive (ID) to the appropriate Operational Commander and the potential force generators with guidance on the planning activities to be undertaken. The Operational Command begins planning and, in conjunction with strategic level staffs, prepares intelligence assessments and starts joint intelligence preparation of the battlespace on the potential area of operations. Possible courses of action (COAs) for the preparation and deployment of a Canadian TF are developed.

3. **Preparation.** Upon receiving Government approval, the CDS will order, either verbally or written in the ID or a tasking order, force employers and force generators to initiate the preparation phase. During this phase, the CDS Directive and follow-on operational commander's Op O will be issued.

4. **Deployment.** The deployment phase involves the strategic move of the Canadian TF to the theatre or regional JTF Area of Operations (AO). Force generators will declare to the CDS that their units are operationally ready (Op Ready) for deployment. The Operational Commander, assisted by CANOSCOM, exercises control of this phase.

5. **Employment.** This phase begins when the Operational Commander and the TF declares that the various components of the TF are Op Ready for Employment and the transfer of command authority (TOCA) directions specified in the CDS Directive and/or operational commander Op O are executed. The common relationships are as follows:

- a. The Canadian TF Comd **is functioning** in the coalition or alliance operational chain of command; in this case, the entire Canadian TF will normally be assigned OPCOM to the Commander of the Canadian TF; or
- b. The Canadian TF Comd **is not functioning** in the coalition or operational chain of command; the Canadian TF elements are normally assigned OPCON to the Commander of an alliance or coalition command. In this case, the principal function of the Canadian TF Comd will be as the Canadian National Comd (CNC) and the TFHQ serves as a National Command Element (NCE).

6. **Redeployment.** The redeployment phase starts on issue of direction to redeploy. While the TF is being assembled for the return home, certain elements of the TF may be required to continue their employment phase missions. Similar to the deployment phase, the Operational Commander, assisted by CANOSCOM, exercises overall control of the movement portion of the redeployment phase. When the Operational Commander is satisfied that all aspects of the operation are complete, including such activities as the post-operation accounting and the collection of data for the Lessons Learned process, the Termination Order (Annex L to Chapter 5) will be issued.

## SECTION III - LEVELS OF PLANNING

### 113. GENERAL

1. There are four distinct, but related, planning levels:
  - a. government policy,
  - b. strategic,
  - c. operational, and
  - d. tactical.
2. Prior to and during an operation, there will be some degree of planning at all levels; however, the level of command that conducts the planning will vary depending on the scope and complexity of the operation. The Minister and the Government is the decisive voice at the policy level. At the official level, the policy and strategic interests of the Department and the Forces are represented by the Deputy Minister and the CDS.

### 114. STRATEGIC LEVEL (DEPARTMENTAL) PLANNING

1. The Government of Canada creates national policies and objectives, which its various departments support by developing a range of options to address domestic or international crises. These response options exist across the spectrum of the diplomatic, information, military and economic elements of national power. Strategic level planning, for the DND/CF, involves how to use the resources of DND and the CF most effectively using the CF FEPP as outlined in more detail in Section IV of this chapter. Annex A to this chapter lists examples of response options.

### 115. OPERATIONAL LEVEL PLANNING

1. As previously stated, the process used to prepare plans and orders for CF operations is called the CF Operational Planning Process (CF OPP). Operational commanders and staffs use this process to translate strategic direction into missions and tasks for subordinate, tactical level commanders. This process is the focus of this manual.

### 116. TACTICAL LEVEL PLANNING

1. Subordinate commanders prepare tactical-level plans or orders that govern the deployment and employment of forces and the conduct of battles, engagements or specific tasks in support of the mission. This manual does not address tactical-level planning.



## SECTION IV – STRATEGIC LEVEL PLANNING

### 117. INTRODUCTION

1. At the strategic level, the Strategic Joint Staff (SJS) found it necessary to adapt OPP to ensure that the planning process used to make decisions concerning the employment of CF assets satisfies the needs of the MND, the DM, and the CDS while reflecting a whole-of-government approach to operations. Accordingly, the CF Forces Employment Planning Process (CF FEPP) framework was developed, trialled, and substantially reviewed. It has since undergone continuous refinement to reflect and support strategic level decision-making concerning Force Employment.

2. The CF FEPP is the process by which future CF Force Employment is anticipated, assessed, approved by the Government of Canada (GoC), planned and direction for its preparation and commencement is issued. The CF FEPP involves a series of inter-related activities, which are conducted both sequentially, in that there are chronological elements to the process, and interactively, in that the implications and consequences of analyses and decisions cross-impact other ongoing initiatives. Force Employment Planning is also an adaptive and dynamic process. It requires dialogue among senior leaders; concurrent and parallel plan development, and collaboration across multiple planning levels. The process starts by identifying the salient considerations affecting CF Force Employment out three to five years. This analytical activity is informed by fundamental directions and constraints imposed by Government policy and available resources as well as by strategic intent derived from the national and international situation.

3. The overall goal of the CF FEPP is to ensure strategic and political control of plan development, translating national objectives into CF objectives and enabling commanders to guide plan development and maximize the staff's thought processes and output. It may appear to be a top down, linear process but there is a constant interactive dialogue between actors at the policy<sup>1</sup>, strategic<sup>2</sup> and operational levels.

4. This section concentrates on describing the key terms of the FEPP and their interrelationships within the process. Where there is duplication between the FEPP and the detailed description of OPP found later in this manual, information has not been repeated in this section. The process has two areas and should be read with continual reference to Annex B:

- a. CF/DND Strategic Watch; and
- b. Active Planning (Deliberate or Rapid Response) broken down into the steps of the planning process: Initiation; Orientation; Course of Action Development; Plan Development; and Plan Review.

### 118. STRATEGIC WATCH

1. Military planning is a logical, systematic problem solving and decision making process that involves creating and continuously refining operational plans. This process exists to support the commander in making decisions. As a part of the strategic planning process (planning, preparation,

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<sup>1</sup> Policy is a set of actions and conditions – prescribed by or on behalf of the Prime Minister and Cabinet – that governs decisions and activities of ministers and other officials in implementing the government's agenda. For the purpose of force employment, national policy is defined as the expression of the desired end-state sought by the government and guidance for the employment of the instruments of power.

<sup>2</sup> Strategy is the art and science of developing and using the political, economic, social-psychological, and military powers of the state in accordance with policy guidance to create effects that protect or advance national interests relative to other states, actors or circumstances.

execution and assessment), military planning uses standard procedures (doctrine) to recommend Courses of Action (COA) to achieve government objectives.

2. **Government of Canada (GoC).** The GoC decides when and under what circumstances the CF will be employed. Normally, decision-making in this context involves two closely related planning processes. The first is a political process to assess the national interest and determine policy and/or whole-of-government strategic objectives, which all departments and agencies support by formulating a range of closely coordinated strategies that exist across the spectrum of diplomatic (or political), informational, military and economic elements of national power. The second is a military feasibility process to determine how best to employ the CF to achieve potential strategic objectives. From this analysis a strategy is devised on how to organize and deploy the CF given the threat environment, the capabilities required and the resources available.

3. **Integrated Strategic Analysis.** Ongoing formal strategic analysis is conducted by National Defence to identify domestic and international threats, crises or trends that may affect Canadian interests. This analysis is a collaborative effort involving ADM (Pol), Chief of Defence Intelligence (CDI), the SJS, other strategic staffs and the operational Commands. Its key focus is the decomposition, detailed examination, and interpretation of internal and external factors affecting national defence and security. At the GoC level, the lead departments for strategic analysis are normally the Department of Foreign Affairs and International Trade Canada (DFAIT), the Department of Public Safety (PS) and the Privy Council Office (PCO), with input from other departments and agencies such as DND.

4. **CDS Critical Intelligence Requirements (CIRs).** CDS CIRs are those information requirements that are considered most vital. A CIR usually involves an immediate requirement to inform the CDS of events that meet its criteria. Normal CDS CIRs are reviewed on a yearly basis and include Friendly Forces Information Requirements (FFIRs) and DND/CF Strategic Intelligence Requirements. FFIRs are maintained and communicated by SJS DGP. DND/CF Strategic Intelligence Requirements are maintained by CDI, with advice from SJS DGP. In addition to normal CDS CIRs, the CDS may express more immediate CIRs, which answer specific operations related questions that the CDS may pose in the course of battle rhythm activities such as morning briefs, the Intelligence and Operations Look Ahead, and Strategic Outlooks. Their horizon is shorter than normal CIRs – months rather than years. They will be recorded and tracked by SJS DGO, who will ensure that they are communicated to the appropriate agencies, using established processes, such as the request for information (RFI) process.

5. **Rolling Strategic Estimates.** Output generated from the strategic analysis provides the nucleus for practical considerations of the potential ends, ways and means of CF Force Employment in the three to five year horizon. This is a continuous, iterative process, involving all strategic staffs in a variety of venues and processes such as Intelligence Indications and Warnings (I&W), Strategic Operations Planning Group (SOPG), strategic readiness, etc.

6. **DND/CF Engagement Strategies, FE Strategies and FE Priorities.** The output of the Rolling Strategic Estimate is the production of key documents such as DND/CF engagement strategies (usually in support of GoC strategies), the Force Employment Strategy, regional force employment strategies, and force employment priorities. Other outputs include statements of policy ends, force employment options, etc.

7. Force Employment Strategies guide the practical commitments and engagements of the CF in a three to five year horizon in support of foreign and defence policy and within the context of the whole-of-government approach. DND/CF Engagement Strategies are usually regionally focused, may have a horizon longer than five years, and focus on areas where perennial security concerns or conflicts affect Canadian national interests. Force Employment priorities guide the allocation of resources to Force Employment activities.

8. **Strategic Outlook (SO).** Informed by the deductions of the Rolling Strategic Estimate, the SO is a recurring opportunity to examine and shape the strategic environment. The focus of the SO is on achieving desired strategic effects during the following 12 to 36 months. Usually conducted as part of the

CDS' Commander's Council or DMC, the SO provides the opportunity for full spectrum, joint effects to be discussed and for command direction/course correction to be imparted on contingency planning. Several SOs are held per year, each one focused on a selected, relevant topic. SOs are managed by SJS DGP.

9. **Integrated Managed Readiness.** The SO highlights and brings forward various capability components, both military and civilian, to the appropriate agreed-upon and centrally directed readiness levels. The function of Integrated Managed Readiness is to incorporate force mix, synchronization, and integration in order to produce relevant, integrated forces at target capability levels in an achievable period at an affordable cost.

10. **Horizon Scanning.** The monitoring and evaluation of external and internal environments for potential areas of Canadian involvement is called Horizon Scanning. This normally occurs at the operational level. It is restrained to the relevant Area of Responsibility (AOR) and conducted in concert with strategic I&W in order to anticipate events and cue activities with long lead-times (e.g. intelligence analysis). Horizon Scanning feeds back into the Rolling Strategic Estimate and provides a bottom-up complement to the alignment of planning effort, thus supporting a strong, common strategic unity of effort.

## 119. ACTIVE PLANNING (DELIBERATE AND RAPID RESPONSE)

1. Essentially there are five stages to the planning process (see Chapter 3, Section III). This portion of the manual will describe these five stages at the strategic level in four separate groups:

- a. Initiation and Orientation;
- b. Courses of Action (COA) development;
- c. Planning Development; and
- d. Plan Review.

## 120. INITIATION AND ORIENTATION

1. **Initiation.** Planning may be initiated at varying levels in response to either political or military events. In the case of plans or orders developed at the strategic level, the CDS will receive political direction from the GoC. In other cases, planning is bottom up. This will often be the case in domestic operations, but the operational commanders or ECSs will also sometimes discern opportunities for expeditionary operations serving the national interest. Acting on these opportunities always remains the prerogative of the Government.

2. **Event or Contingency.** An event or contingency can be any situation affecting the global security environment with actual or potential impact on Canadian national interests. The event may be probable, imminent or happening.

3. **Whole of Government/Strategic Assessment.** In anticipation or response to a developing domestic or international event, the GoC will conduct a strategic assessment to consider how instruments of national power could be applied to resolve or influence the situation and whether it is appropriate and in the national interest to do so. Assessment and planning for such an eventuality may be triggered as top-down direction in response to a GoC or CDS query or direction, or it may result from another department such as DFAIT or PS. Strategic assessments and planning may also be initiated bottom-up by an operational level commander based on his or her own predictive analysis, inter-relationships and horizon scanning. Strategic Assessments range from the simple staff check to an elaborate effort involving complex analysis, the deployment of fact-finding missions, interdepartmental discussions, etc. One output of the strategic assessment may be initial CDS military advice to the GoC.

4. Strategic assessments serve two purposes: to assist decision making for near term GoC or

military activities; and to be used within a longer timeframe in association with capability development. In the military context, expected activities out three to five years tend to fall under the category of FE or FG. Longer-term activities fall under FD.

5. Classical strategy was inherently military. Today, strategy is sometimes used synonymously with policy, but more often serves to describe the practical orientation undertaken by the GoC or its departments towards the fulfillment of policy. Strategies are not developed in isolation. In most cases, all instruments of national power are integrated at the strategic, operational and even tactical levels. Even though CF strategic objectives will be predominantly military in nature, they should consider and integrate other instruments of national power and alliance or coalition objectives.

6. Close consultation and coordination with OGD partners and, when appropriate, international partners, is necessary for both domestic and international operations. In concert with the Whole of Government assessment, the CDS and senior leadership of DND/CF (assisted principally by strategic level staff) will consider how the CF may be employed in conjunction with the other elements of national power to resolve or influence a developing situation. The first desired outcome of the Whole of Government assessment is the identification of national goals, objectives, priorities, and interests. The second is broad guidance on the manner, or ways, in which instruments of national power will be integrated, directed and applied. Examples of strategic level ways or methods are many and will often be undertaken as part of a larger multinational effort. A number of options are available and could include the selection of a variety approaches, either alone or in combination, such as:

- a. containment (the overall Western approach throughout the Cold War);
- b. deterrence (through the use of flexible deterrent options);
- c. forward defence (such as the CF presence in Europe throughout the Cold War);
- d. full-spectrum operations (such as our current operations in Afghanistan);
- e. stability operations (such as the many peacekeeping and peace enforcement operations of the 1990s);
- f. humanitarian assistance (such as the Disaster Assistance Relief Team or the airlift of supplies);
- g. support to UN/NATO/Coalition (in a variety of roles and postures such as leadership, provision of key functions/enablers or individual augmentation);
- h. arms control verification (such as our current activities in support of the OSCE, NATO and the UN);
- i. defence diplomacy (advocacy, naval port visits, small unit exchanges, etc); and
- j. nation capacity building or security assistance (such as the Military Training Assistance Programme, the Strategic Advisory Team in Kabul, the Provincial Reconstruction Team in Kandahar, "train and equip" programmes).

7. Strategic assessment is a continuous process, one in which peaks of activity occur at certain moments such as following an event that impacts on national security. After the initiation of planning, continued strategic assessment allows the reorientation, when required, of the planning effort as well as, later in plan review, an assessment of whether to expand, convert, reduce or terminate an ongoing operation.

8. **GoC/Cabinet/MND Guidance.** Informed by Whole of Government/Strategic Assessment, the GoC may provide guidance to cease or reorient the active consideration of an issue. Such guidance may include: the priority of the planning effort; the lead and supporting department responsibilities; the degree of acceptable risk; the parameters within which the GoC response options should be situated; and the intended effects or desired outcome of this response. At this early juncture in the process, it is likely that only broad policy goals will be defined, leaving the determination of decisive and attainable national objectives and a national policy end state for later. In some cases, very rapid deployments such as the DART and the evacuation of Canadians overseas will dispense with the elaborate direction normally formulated for more deliberate operations.

9. GoC/MND guidance at this stage will also articulate whether continued consideration of the military instrument of power is appropriate. If so, specific Government instructions and limitations on DND/CF planning should be provided.

10. **Intelligence and Operations Look Ahead (IOLA).** Another output from the Rolling Strategic Estimate is the IOLA that provides the DM and the CDS, briefings at a classification higher than SECRET, on topics of a strategic nature/impact in a forum where they can ask questions and discuss the issues. Briefings alternate between a global scan and thematic or regional approaches. They are often based on CIRs from key decision makers and can help focus or initiate the strategic planning effort.

11. **CDS Military Advice.** As the senior military advisor to the GoC, the CDS provides advice to the MND on all military matters, including military requirements, capabilities and force employment considerations and options. When and where required, the CDS will also advise the Prime Minister and Cabinet directly. In parallel with CDS military advice, the Deputy Minister provides policy advice to the MND.

12. **Initiating Directives/Tasking Orders.** The purpose of a CDS Initiating Directive (CDS ID) is to formalize the initiation of strategic and operational level planning and communicate the deductions of the strategic assessment, either concurrently or following its completion. A CDS ID will state planning assumptions, define desired strategic objectives, outline CDS intent, impose appropriate limitations, appoint Supported and Supporting Commanders, identify key planning milestones and provide the force apportionment (an initial estimate of available forces authorized for planning).

13. While the CDS ID initiates planning, it does not confer the authority to execute an operation. It may, however, authorize reconnaissance, heighten readiness states and permit preliminary movement. In domestic routine operations and certain domestic contingency operations conducted as a provision of service, a CDS ID is not required as planning and some preparation authority have already been delegated to Commander Canada COM.

14. In the highly dynamic environment of strategic planning, it will often be necessary to adjust the planning effort. This will be necessary, for example, if the execution of an operation is not imminent, new facts have emerged, initial assumptions have been invalidated or GoC intentions have changed. One way of adjusting the planning effort is through a Supplementary Initiating Directive.

15. For simpler tasks or missions, a CDS Tasking Order should suffice. The purpose of a CDS Tasking Order is to direct the execution of a task or specific action. At the strategic level, a task usually involves carrying out a specific activity in support of a wider commitment.

16. **Force Apportionment.** Force apportionment is based on CF readiness and GoC/MND level of ambition for a given operation. It refers to the distribution of resources for planning purposes. Competing priorities can significantly limit the amount of resources and support available and require different apportionment considerations at the strategic and operational planning levels.

17. **JTF Commander Appointment.** The CDS selects JTF Commanders of General Officer rank. The supported commander selects JTF Commanders of Colonel rank and below.
18. **The Supported Commander's Initial Guidance.** The Supported Commander's initial guidance is absolutely critical to initiating the military decision-making process. It broadly outlines what is expected and helps focus the planning effort in a meaningful direction to develop COAs. Guidance normally emerges from an information exchange and should state, in finite and measurable terms, any identified or contemplated objectives. These stated objectives and any resulting tasks must be tied directly to operational decision points to be operationally relevant.
19. **The Operational Planning Process (OPP) Begins.** With the Operational Commander's Initial guidance, OPP as described in detail later in this manual can formally begin. The purpose of the OPP is to generate a plan at the operational level that takes into account the resources and function required to meet the operational objectives.
20. **Warning Orders.** See Chapter 4 and Chapter 5 Annex A.
21. **Mission Analysis.** See Chapters 3 and 4.
22. **Operational Commanders Planning Guidance.** See Chapter 4. This planning guidance not only highlights updated direction and enables subordinate or supporting commanders to begin their preliminary preparations. It also serves to inform the CDS and strategic level staffs of the operational commander's guidance and allows them to indicate concurrence at the initial stage of the overall planning process.
23. **JTF Planning.** The planning process may be initiated bottom-up by an operational or JTF level commander. Indeed, prudence dictates that commanders responsible for an AOR identify likely contingencies through Horizon Scanning. This will particularly be the case in domestic operations, in which bottom-up requests driven by federal or provincial level civil authorities, figure prominently.
24. The existence of a framework of legislation, Orders in Council, Memorandum of Understanding, and the authority vested in Commander Canada COM and the Regional Joint Task Force Commanders may mean that there already exists appropriate authority and resources for the operation and that it is therefore unnecessary to issue the full range of CDS direction.
25. **Operational Reconnaissance.** The importance of conducting an early and detailed reconnaissance, while most probably being constrained by time and limited in numbers, needs constant emphasis. The reconnaissance must identify and produce the infrastructure planning outputs required in a form understandable by both military and civilian agencies.

## 121. COA DEVELOPMENT

1. **COAs.** COAs are based on ideas that may have originated from the Government, the CDS, or the Operational Commander. See Chapter 4, Section IV for more detail.
2. **The Information Brief.** Regular and frequent communication between the CDS and subordinate commanders, as well as their respective staffs, will ensure unity of thought as COA development progresses; this is particularly important in an environment characterized by Volatility, Uncertainty, Complexity and Ambiguity (VUCA). At a certain point, the operational commander will receive an information brief on the initial COA development process. See Chapter 4, Section IV for more detail.
3. **COA Selection or Endorsement.** The authority to approve or select a COA very often rests at a higher level, especially for international operations. In these cases, the operational commander will

therefore confine his direction to the range and nature of the COAs to be presented to the CDS. The process of selecting or endorsing a range of COAs will normally include a detailed COA comparison and “wargaming” sessions lead by the supported operational command, with participation from the supporting commands and the SJS. Consultation and close coordination with strategic and OGD staff, as well as coalition partners and multinational organizations, as applicable, will ensure military force employment options support an integrated “whole of government” approach as well as applicable coalition engagement strategies and planning efforts.

## 122. PLAN DEVELOPMENT

1. **COA Backbriefs.** Once satisfied with the selected COA’s effectiveness the Commander will normally seek and acquire CDS endorsement before proceeding with the effort to develop the COA into a Concept of Operations (CONOPs) or Campaign Plan. A formal briefing is presented to the CDS in which the Commander provides a graphic representation that clearly and objectively articulates the COA proposal that will best meet national and coalition objectives.

2. Since the authority to approve or select a COA normally rests at the GoC level, especially for international operations, the CDS may also confine his direction to the range and nature of the COAs to be developed.

3. The presentation of such military advice to the GoC results in either the inclusion or elimination of a military dimension to the GoC response. If there is to be a military dimension, GoC decisions and direction at this stage will be communicated to the supported commander through the CDS. The supported commander will then translate the selected COA into a CONOPs or Campaign Plan.

4. **Joint Statement of Requirements (JSOR).** Elements briefed during the COA and developed, as part of the CONOPs, will allow the preparation of the JSOR. The JSOR enables strategic staffs to highlight the resources necessary to address the military objective. In turn, an analysis of the requirements will contribute to the development of effective CONOPs.

5. The JSOR and a Table of Organization and Equipment are briefed and submitted to the CDS in conjunction with the CONOPs. The JSOR illustrates the supported commander’s requirements in terms of scale of forces, types of capabilities and equipment, and other resources and enablers needed to execute an operation.

6. **Table of Organization and Equipment (TO&E).** The TO&E is developed in detail by the supported commander in close consultation with supporting commanders and strategic staff. The TO&E prescribes the specific organization, personnel and equipment identified for an operation. The content of the TO&E falls under the authority of the operational-level supported commander and must be developed within the parameters established by the CDS and, *inter alia*, any strategic policy limitations, possible personnel ceilings, and CDS directed force allocations.

7. **FE CONOPS and CONOPS Backbrief.** After an endorsed COA or set of COAs has been developed into a CONOP, with an accompanying JSOR and TO&E, the supported commander will brief it to the CDS, either in segments or as a whole. In some cases, if the GoC has already endorsed a COA, CONOPS approval allows the CDS to confirm his intent, ensure effective and efficient CF-level coordination of FE, and identify issues that may require further interdepartmental coordination. In other cases, a refined CONOPS will require a CDS briefing to the MND or Cabinet before it is approved.

8. The FE CONOPS is a clear and concise statement of the manner in which military resources will be employed to achieve specified objectives or efforts. The CONOPS is always a formal written product and is a clear and concise statement of the line of action chosen by the Commander in order to accomplish the mission. In general, the CONOPS accomplishes the following:

- a. expresses the supported commander’s methodology and rationale to attain objectives;

- b. advises the CDS of the Commander's intentions and provides an instrument for him to concur and, if necessary, to obtain political approval; and
- c. informs subordinate commanders, headquarters' staff and supporting formations of the scope nature and likely tasking required for their plans.

9. The CONOPS backbrief to the CDS is conducted in the presence of the Force Generators who will, as appropriate, complement the FE CONOPS brief with a FG brief outlining, in particular, sustainability over time.

10. **Force Generation Conference and Force Allocation.** Force Allocation is the distribution for employment of the limited forces and resources among competing requirements. Allocation of forces is communicated to supporting commanders in the form of CDS Directives and Tasking Orders.

11. **CDS Directive or FE Strategy.** The approval of the strategic plan by the GoC and the detailed analysis of the selected plan provided through backbriefs (COA, CONOP and Campaign Plan) will drive and aid in the development of CDS Directives, which refines the strategic direction given earlier.

12. The purpose of a CDS directive is to communicate the establishment of a policy or to order the execution of an operation. This is the preliminary step in the development of an operational plan or order. It expresses the military commander's intentions on the use of forces, the time and space to achieve the mission, the objectives, and the end state. It includes how the capabilities of the available resources are to be synchronized towards the end state. The directive usually consists of a situation overview, mission statement, commander's intent, an outline concept for execution, force capability requirements, an outline logistic support concept, and key command and control arrangements. The strategic direction will vary depending on the overall situation.

13. **CDS Military Advice on Options.** The presentation of COAs or a CONOP to the GoC will normally include the following:

- a. a summary of policy and strategic goals, objectives and end-state.
- b. a broad description of the capabilities involved, in terms of the:
  - (1) number of personnel, type of organization, and major equipment;
  - (2) sustainability over time; and
  - (3) Rough Order of Magnitude (ROM) costs and whether DND will seek additional funding to support the operation;
- c. a broad description of the ways, or types of operations, including consideration of inherent high profile factors such detainees and use of force; and
- d. a military risk assessment.

14. **GoC/Cabinet/MND Direction.** The MND carries legal responsibility and is accountable to Parliament for the administration, management and direction of the Canadian Forces and of all matters relating to national defence. All decisions and actions taken by the CF are carried out, directly or indirectly, under the authority of the MND. The Minister, who is accountable to Parliament for the actions of their officials, expects to be kept fully informed of any decisions or activities by the CF that may be of concern to Parliament or the public.<sup>3</sup> In the case of Force Employment planning, this involves the

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<sup>3</sup> Canada. Department of National Defence,



endorsement or approval of COAs for the employment of the CF. The MND is then responsible to present these options to the GoC/Cabinet for decision on the advice of the CDS and DM.

15. A GoC/Cabinet decision is required prior to the commitment of military resources or commencement of any major military operation. The Cabinet can, without parliamentary approval or consultation, commit the Canadian Forces to action. Historically, involvement of the Parliament in the decision-making process has ranged from no consultation at all to a full debate with a vote in the House of Commons before making a formal commitment. The House also plays an indirect role by voting to grant or withhold funds and by retaining or withdrawing confidence in the government of the day.<sup>4</sup>

16. **Campaign Plan.** A campaign plan articulates the operational design aimed at accomplishing national, strategic, and operational objectives. Several alternative models of campaign design are available to a commander; however, the effects-based approach is commonly used today.

17. **Contingency Plan (CONPLAN).** A CONPLAN is prepared for contingencies that can reasonably be anticipated. It reflects potential response options but no specific time is set for the operation. See Chapter 4 for more detail.

18. **Operation Plan (OPLAN).** See Chapter 4 for more detail.

19. **Supporting Plan (SUPLAN).** See Chapter 4 for more detail.

20. **Operation Order (OP O).** See Chapter 4 for more detail.

21. **Sustained FG SUPLAN.** Under the coordination of the primary force generator, all supporting commanders will prepare supporting plans to ensure the requirements of the supported commander are sustained over time. This plan will include the identification, training and equipping of forces for operations.

22. **Fragmentary Orders.** See Chapter 4 for more detail.

23. **Branch and Sequel Planning.** See Chapter 4 for more detail.

## 123. PLAN REVIEW

1. Once execution of a plan begins, plan review begins. At this stage it is necessary to continually review the planning, preparation and execution phases and monitor the effectiveness of the strategic plan on the operation. This is essential to ensure that required changes can be incorporated to ensure the mission continues to be achievable. All plans have a limited period of validity due to the changing circumstances upon which they were based.

2. **Strategic Assessment.** The strategic assessment process during this stage is continuously conducted to measure progress and identify necessary adjustments. Military assessments also serve to inform “whole of government” reviews. The outcome of these reviews informs advice to Government.

3. **Campaign Assessment.** The Campaign Assessment measures whether campaign objectives are being achieved and identify whether modifying action is required. This essential process ensures that required changes are identified and if needed, Frag Os, branches, or sequels are developed and executed. The results of the campaign assessment inform and support the Strategic Assessment. These assessments provide indispensable information to the GoC required to amend national or coalition objectives.

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[http://www.forces.gc.ca/site/minister/eng/authority/OA3\\_e.htm](http://www.forces.gc.ca/site/minister/eng/authority/OA3_e.htm); Internet 18 Oct 07

<sup>4</sup>Canada. Library of Parliament, International Deployment of Canadian Forces Parliament’s Role; May 2006 available from; <http://www.parl.gc.ca/information/library/PRBpubs/prb0006-e.htm>; Internet 18 Oct 07

4. **GoC/Cabinet/MND Direction.** Major changes to an ongoing mission require the same consultation and involvement by the same actors as in its initial stages. The outcome of this stage is GoC direction for the initiation, expansion, conversion, reduction, or termination of Force Employment activities.

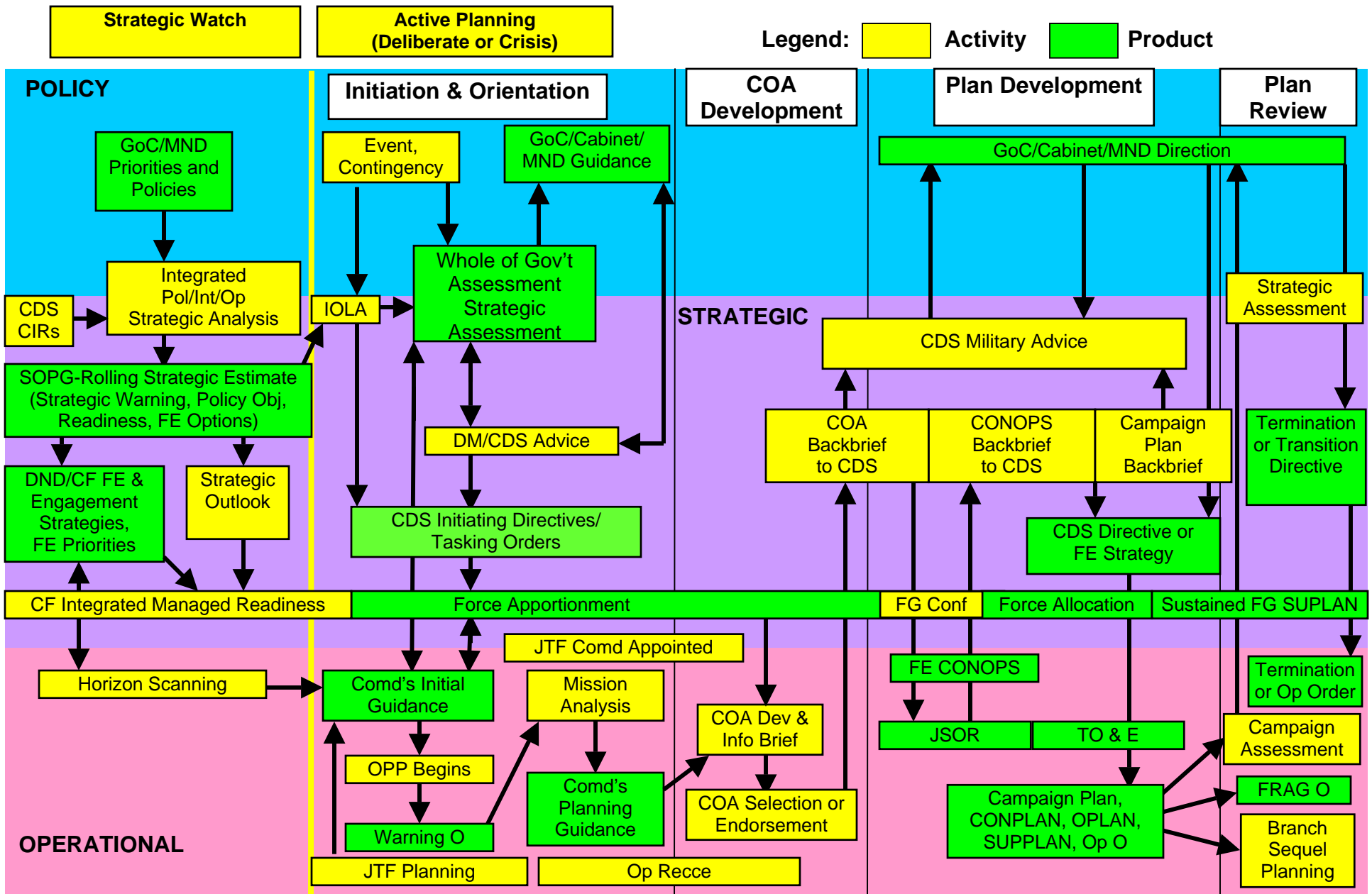
5. **Termination or Transition Directive and Orders.** Based on strategic and campaign assessments the GoC can call for a termination or transition of the military operation or mission. The directive is a formally issued order and, in most cases, the CDS will issue direction to terminate an operation following receipt of a recommendation from the supported commander and with GoC/Cabinet/MND approval.

## ANNEX A - EXAMPLES OF RESPONSE OPTIONS

<b>DIPLOMATIC RESPONSE OPTIONS</b>	
<ul style="list-style-type: none"> <li>• Alert and introduce special teams               <ul style="list-style-type: none"> <li>- Public diplomacy</li> <li>- Communications</li> </ul> </li> <li>• Reduce international diplomatic ties</li> <li>• Increase cultural group pressure</li> <li>• Initiate non-combatant evacuation procedures</li> <li>• Promote democratic elections</li> <li>• Identify clearly the steps to peaceful resolution</li> <li>• Restrict activities of diplomats</li> <li>• Heighten international efforts directed at:               <ul style="list-style-type: none"> <li>- the international community</li> <li>- the people within the nation</li> <li>- the allies of the opponent</li> <li>- the coalition formed to overcome the crisis</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Alter existing meetings, programs or schedules</li> <li>• Prepare to withdraw Canadian embassy personnel</li> <li>• Reduce national embassy personnel</li> <li>• Take actions to win support of allies and friends</li> <li>• Pursue measures to increase regional support</li> <li>• Identify the national leader who may be able to solve the problem</li> <li>• Coordinate efforts to strengthen international support</li> <li>• Use the UN or other international institutions</li> <li>• Develop or work within an existing coalition</li> <li>• Show international resolve</li> </ul>
<b>POLITICAL RESPONSE OPTIONS</b>	
<ul style="list-style-type: none"> <li>• Heighten public awareness of the problem and potential for conflict</li> <li>• Gain popular support</li> <li>• Gain parliamentary support</li> <li>• Take measures to increase public support</li> <li>• Maintain an open dialogue with the press</li> </ul>	<ul style="list-style-type: none"> <li>• Take steps to gain and maintain the confidence of the public</li> <li>• Promote Canadian policy objectives through public policy statements</li> <li>• Heighten informational efforts within security constraints imposed by the crisis</li> <li>• Keep selected issues as lead stories</li> </ul>
<b>ECONOMIC RESPONSE OPTIONS</b>	
<ul style="list-style-type: none"> <li>• Freeze monetary assets in Canada</li> <li>• Seize real property in Canada</li> <li>• Freeze international assets where possible</li> <li>• Embargo goods and services</li> <li>• Enact trade sanctions</li> <li>• Cancel Canadian-funded programs</li> </ul>	<ul style="list-style-type: none"> <li>• Encourage corporations to restrict transactions</li> <li>• Reduce security assistance programs</li> <li>• Heighten international efforts directed at:               <ul style="list-style-type: none"> <li>- financial institutions questioning the soundness of continuing actions with the opponents' businesses</li> <li>- reducing or eliminating corporate transactions</li> </ul> </li> </ul>
<b>MILITARY RESPONSE OPTIONS</b>	
<ul style="list-style-type: none"> <li>• Employ readily in-place resources</li> <li>• Upgrade alert status</li> <li>• Increase strategic reconnaissance</li> <li>• Increase intelligence collection efforts</li> <li>• Initiate or increase show of force actions</li> <li>• Employ electronic measures</li> <li>• Conduct aircraft flyovers</li> <li>• Increase exercise activities, schedules and scope</li> <li>• Increase military exchanges and staff visits to the area</li> <li>• Impose restrictions on military personnel, retirements, separations and leaves; establish curfews</li> </ul>	<ul style="list-style-type: none"> <li>• Institute provisions of existing HN agreements</li> <li>• Use naval or air capability to enforce sanctions</li> <li>• Deploy tactical fighter squadrons</li> <li>• Order contingency forces to initiate actions to deploy</li> <li>• Deploy Naval Task Group to the region</li> <li>• Begin moving forces to air and sea ports of embarkation</li> <li>• Activate procedures to begin reserve call up</li> <li>• Pre-stage airlift and airlift support assets</li> <li>• Emplace logistics infrastructure where possible</li> <li>• Open and secure sea and airlines of communication.</li> </ul>

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ANNEX B – THE CF FORCE EMPLOYMENT PLANNING PROCESS



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## CHAPTER 2

### CAMPAIGNING

#### SECTION I – CAMPAIGN DESIGN AND PLANNING

##### 201. OPERATIONAL CONCEPTS IN CAMPAIGN DESIGN

1. There are several operational concepts that are fundamental to the design and conduct of campaigns. These concepts are accepted in Canadian and allied doctrines as planning tools for campaign design. To the extent practicable, the principles that design an operational campaign should apply across the spectrum of operations, from peacetime to warfighting, either at home or abroad.
2. **End State.** The end state is always defined by government. Moreover, it is important to remember that it can change over the course of the campaign, as a result of the situation on the ground or how the Government decides to use the resources at its disposal.
3. **Objectives.** An objective is defined as *“a clearly defined and attainable goal for a military operation, for example seizing a terrain feature, neutralizing an enemy’s force or capability or achieving some other desired outcome that is essential to a commander’s plan and towards which the operation is directed”* (NATP AAP-6). Objectives are the constituent elements, which when combined achieve the end state. They exist on the physical and psychological planes. In the former context an objective may be the destruction of an enemy force. In the latter context, an objective may be to convince a hostile populace to accept a temporary military presence, or to stop supporting an insurgency.
4. **Effects.** Effects can be defined as the consequence of one or more activities that contribute to one or more objectives. In the context of the effects based approach, effects are the changes brought about by the interplay of deliberate activities and circumstances that contribute to the realization of objectives. Effects link a range of activities in time, space and/or purpose.
5. **Centre of Gravity.** The Centre of Gravity is defined as “characteristics, capabilities or localities from which a nation, an alliance, a military force or other grouping derives its freedom of action, physical strength or will to fight.” Recent writings on the topic of centre of gravity have suggested that Western militaries have taken Clausewitz’s concept of the Centre of Gravity too far. What was intended as an abstract analytical concept was never intended to be the singular focus of campaigning. As such, it has been suggested that the unifying focus of any campaign should be the evolving end state, goals and objectives and if a clear, useful centre of gravity is present then it should be included in the operational art.
6. Campaign design depends on an ongoing analysis of one’s strengths and weaknesses, relative to the task at hand as compared to the adversary. Consideration of how to expose and to neutralize the appropriate opposition Centre of Gravity while protecting one’s own is a variation of strength and weakness analysis. It can also be useful to relate the center of gravity to its critical capabilities, which are then related to critical requirements and then to critical vulnerabilities. These vulnerabilities need to be protected if they are friendly or attacked if they belong to the enemy. This detailed analysis allows for more intangible centres of gravity to be related to more tangible elements. Centres of Gravity can be considered at the strategic, operational and tactical levels of conflict.
7. **Decisive Points.** A decisive point is a critical event that paves the way to the end-state.
  - a. These events vary with every operation. They range from gaining air superiority, eliminating a key opposition capability, establishing a firm base for developing operations, changing weather conditions or achieving of electromagnetic dominance. Analysis must also consider what the opposing force perceives as decisive points in relation to the end state, for these will indicate emphasis for force protection.

- b. Since decisive points indicate conditions that must be set in order to achieve the aim of the campaign, they can also be considered as intermediate operational objectives and can be assigned resources to protect, control or achieve them.
- c. Decisive points may be immediately vulnerable to attack, but the opposition will probably recognize their importance and take measures to protect them. Thus an opposing capability may not be directly vulnerable but the commander will want to attack it from an aspect of vulnerability rather than one of strength versus strength. That vulnerability will have to be exposed through a determination of the strengths and weaknesses of friendly, allied and opposition forces. Thus, while decisive points themselves are not necessarily vulnerable, a determination of *critical vulnerabilities* of each decisive point will reveal how it can best be achieved. For example, in determining how to achieve air superiority, analysis of aircrew, fuelling, aircraft capabilities, aircraft production, airfields, ground support and air defence, among others would reveal the most likely critical vulnerability for this decisive point.

8. **Lines of Operation.** Lines of operation establish the relationship between decisive points, produce a critical path in time and space along the path to the end state and ensure that events are tackled in a logical progression. The operational commander uses them to synchronize and integrate capabilities such as firepower, deception, manoeuvre, special operations, etc. as well as ensure that military effort is coordinated with the actions of other elements of national power in the execution of a Whole of Government strategy or campaign plan.

9. **Transition Conditions.** Transition conditions are the set of required conditions or effects that defines a transition in the nature of CF Force Employment activities, CF Operations, the TF mission or force structure. Whether at home or abroad, these conditions are the components that set the stage for a change in the use of the Canadian Forces. These conditions usually occur when an operation is nearing its end or undergoing significant change. They are the hinge to sequel operations or a state of military readiness, which, in cooperation with the other instruments of national power, aim at the policy end state and its enduring objectives. CF transition conditions therefore define the initiation, expansion, conversion, reduction or exit of Force Employment activities. They must be sufficiently detailed to provide operational level commanders with as clear a vision as possible of mission success. As such, CF transition conditions replace older, narrow, concepts such as a “CF military end state,” a “CF strategic end state,” a “CF exit strategy,” a “CF Criteria for success,” and “triggers,” etc. As a final consideration, although time per se should not constitute a condition, transition conditions may in fact bear heavily on the duration of an operation.

10. **Sequencing.** The arrangement of events within a campaign in an order that is most likely to achieve the end state is called *sequencing*. Sequencing therefore is the specific ordering and synchronizing of operations along the line of operations.

- a. Given a strategic aim not attainable by a single action at a single place and time, the campaign design will comprise several related *phases* sequenced over time to achieve the aim.
- b. Phasing is a way of organizing the extended and dispersed activities of the campaign or major operation into more manageable parts that allow for flexibility in execution. The first phase may be in great detail, while those actions that follow may be less clear. However, clarity of the end point is absolutely essential for operational-level success.
- c. Phases may occur simultaneously as well as sequentially.
- d. The sequencing must consider the entire line of operation from force preparation and build up, assembly and training through build up of logistic support and deployment to the Joint Area of Operations (JOA), to execution of the operation to conflict termination and post conflict activities. It should also consider redeployment of forces and the withholding of resources in reserve.



11. **Direct and Indirect Approach.** Lines of operation are carefully sequenced to flow through the defined decisive points towards the end state using either a technique of a *direct* or an *indirect* approach. These approaches are not merely geographic in nature but indicate the overall methodology for achieving the aim.

- a. The direct approach involves a linear, uninterrupted approach against an opponent's centre of gravity by the quickest and most direct route. This approach has the advantage of normally being the quickest and most decisive means of attaining the end state. It may mean the use of a direct attack on an opponent's strength but if a clear superiority of force is available, this may be preferable and less costly than a protracted operation. The element of superiority refers not just to mathematical force ratios but is also a function of the quality of the forces, technological superiority, information superiority, and strategic, operational and tactical surprise.
- b. The application of military force by indirect means involves the conscious exploitation of the critical vulnerabilities of opposing forces and the avoidance of opposition strengths rather than a decisive force on force clash between forces. At the operational level, the indirect approach will almost certainly involve the coordination with other elements of national power to form a coherent campaign.
- c. Frequently, modern operations will employ multiple lines of operations that employ elements of both the direct and indirect approaches. Multiple tactical thrusts that are mutually enhancing increase the speed and ambiguity of operations. This not only allows multiple lines of operation to converge upon an opponent's centre of gravity but also takes advantage of the ability to synchronize manoeuvre, tempo and operational pauses to overload an opponent's decision-making capability.

12. **Culmination.** An operation reaches its culminating point when the current situation can just be maintained but not developed to any greater advantage.

- a. Culmination has both defensive and offensive applications. To use the example of combat operations, the culminating point is reached when the attacker has insufficient combat power to maintain the attack and risks losing the initiative to the defender. A defending force reaches its culminating point when it no longer has the capability to mount a counter offensive or to defend successfully.
- b. Operations reach a culminating point for several reasons. In combat operations, the forward movement of supplies may be insufficiently organized or may lack needed transport or available stocks may be exhausted. The attacking force may have suffered sufficient combat losses to tip the balance of forces. The attacker may have entered terrain that is more easily defended. A force may become physically exhausted and, as a matter of morale, less committed as the attack progresses. The defending force may become more determined as large portions of their own territory are lost. In counter-insurgency operations, culmination can occur when a force fails to obtain sufficient support from the local population or when the threat to the national interest does not justify the commitment of sufficient resources. In domestic operations, the conditions requiring the use of the CF may have abated to the extent that other governmental organizations can attend to the problem. Synchronization may need adjustment due to changing circumstances or resources. All of these causes and combinations of them have resulted in adjusted culminating points.
- c. A commander therefore will attempt to force an opponent to his culminating point before his reaching his own. This requires command skill and careful planning to balance risk and initiative against the tendency to make that one last effort to reach for an objective that is just beyond capability of achievement. Operations are now normally conducted on a relatively continuous basis and on multiple lines of operations. Therefore commanders

must pay close attention to the sustainability of operations, to morale and the physical condition of their forces and to the maintenance of fighting power.

- d. Before a commander reaches an anticipated culminating point, options for adjustment should be implemented. These include pausing, re-phasing or transitions between offence and defence.

13. **Manoeuvre.** To manoeuvre is to seek to gain a position of advantage in respect to the opponent from which force can be applied or threatened. Manoeuvre is applied against decisive points or against a centre of gravity directly.

- a. Manoeuvre concepts have been over-simplified into “attritionist” or direct, lower-risk, higher-resource approach and “manoeuvrist” or indirect, higher-risk, lower-resource approach schools. This has led to the expectation of a consistent approach that produces fewer casualties despite the evidence of experience. No single manoeuvre theory guarantees success or fewer casualties. An armed combatant is a complex organism whose effective operation depends not merely on the performance of each of its component parts, but also on the smoothness with which these components interact and the reliability with which they implement the will of the commander. As with any complex organism, some components are more vital than others to the smooth and reliable operation of the whole. If these are damaged or destroyed, their loss unbalances the entire structure, producing a cascading deterioration in cohesion and effectiveness that may result in complete failure. The success of manoeuvre is predicated on accomplishing this as decisively and as quickly as possible. The object of manoeuvre is therefore either to destroy the opponent’s physical means to resist or to destroy his capability to resist. The first approach is essentially attritionist or exhaustion-oriented and directed against his forces, the second, manoeuvrist or annihilation-oriented and directed against his cohesion and will. In either case, the campaign design must cater to finding, fixing and striking the opponent’s critical vulnerabilities.
- b. Manoeuvre is therefore linked to the concepts of direct and indirect approaches, to tempo and to sequencing. However, while the concept of a direct or indirect approach for a campaign applies to the overall line of operation, manoeuvre more appropriately applies to the achievement of specific decisive points. As strengths and weaknesses of decisive points are determined and critical vulnerabilities revealed, forces will manoeuvre, *jointly*, to achieve these points. Thus within one campaign, there will be a variety of manoeuvre approaches employed. It is therefore a necessity that campaign design caters for decentralized execution and allows subordinate commanders sufficient *freedom of action* to achieve their aims.
- c. Operational manoeuvre seeks a decisive impact on the conduct of a campaign. Forces manoeuvre both to secure the advantage of position before battle is joined and to exploit tactical success to achieve strategic results. Scale alone does not make manoeuvre operational; rather, the significance of manoeuvre is derived from its basic purpose of creating operational advantage. Manoeuvre implies use of an indirect approach and that further implies approaching from flanks. Operationally, flanks are not related to a specific direction. At this level of conflict a flank is that direction or location where the opponent cannot focus appropriate attention. Front, flanks and rear are relative terms and can change quickly. Hence, to find and approach a flank requires that the opponent’s attention be fixed in another direction. This fixing need not be achieved by force but can be fixed by deception.
- d. Operational security concerns, informational technology and the requirement to orchestrate all of the national elements of power may appear to restrict freedom of action through over-centralized management. Nevertheless, the operational commander’s primary function during the conduct of operations is to synchronize concurrent and sequential tactical actions to retain the initiative and to maintain his subordinate’s

freedom of action. This synchronization is made possible by a campaign design that is clear in intent, has achievable objectives, sufficient resource allocation and trust. The design also enables decentralized execution by identifying the *main effort* by phase and the clearly delineated *supported* and *supporting* commander relationship by phase.

14. **Tempo.** Tempo is the rate or rhythm of activity relative to the opposition. A faster relative tempo will allow one side to seize the initiative and dictate the conduct of operations. Tempo incorporates the capacity of a force to transition from one operational posture to another. By varying tempo or rhythm of operations a commander can impose threats to which an opponent's decision cycle is increasingly unable to react and thus to which his responses are increasingly inappropriate. Tempo does not imply an ever-increasing speed of operations but rather a competitive pace of operational change. Commanders must be aware of the danger of establishing a pace that his force cannot maintain. Tempo is therefore directly related to sequencing and to culmination. Tempo can best be created and maintained through decentralized decision-making and operational execution within a framework of unifying intent. Subordinate commanders can use initiative within the scope of the overall campaign plan to seize opportunities that contribute to the maintenance of operational tempo.

15. **Operational Pause.** In order to regenerate fighting power before reaching a culminating point, a commander may find it necessary to plan an operational pause. Adversarial action may also necessitate a pause.

- a. The level of sustainment within or available to the theatre may place limits on timing and sequencing of operations and battles. Early identification of critical logistical constraints to planned operations is indispensable, both to initiate intense efforts to find alternative solutions and to modify plans as required on a timely basis.
- b. An operational pause will be planned so that initiative is not unnecessarily forfeit to the opponent. While some subordinate forces are required to replenish or reconstitute, others will maintain tempo along another line of operation. Flexibility and a sound campaign plan that ensures an *operational reserve* will allow operational pausing without sacrificing initiative.

## 202. CAMPAIGN PLANNING

1. **Campaign Plan.** A campaign plan is the practical expression of operational art. The campaign plan and its attendant operational planning process are techniques used to aid the operational commander in fleshing out his concept for how he will orchestrate operations, engagements and battles toward the achievement of strategic objectives.

2. **Planning Components.** The campaign plan should describe to subordinates and to superiors, the envisioned objectives and transition conditions, the overall concept and intent of the campaign. It may identify the opposition and friendly centres of gravity but it will identify decisive points, the tentative sequence of events and phases that will lead to preliminary objectives and the ultimate end state. It should also outline the command structure and general concept for supporting functions that will unify the efforts of subordinate commanders and staffs.

3. **Operational Planning Process.** The planning for a campaign is conducted using the stages of the operational planning process. This process enables the commander to translate strategy and goals into a unified plan for military action by describing how operations and logistics will be used to achieve success within a given space and time. This process is one of stages and is commander-driven and staff supported.

- a. The operational planning process essentially answers four key questions:
  - (1) Which conditions must be attained in order to achieve the strategic and operational objectives?

- (2) What sequence of actions is most likely to produce these conditions?
- (3) How should military resources be applied to produce these conditions?
- (4) Are the associated risks acceptable?

- b. Initially, where existing contingency plans exist, they are evaluated with respect to the specific operational concepts required for current operations. Where no such plans exist, then a campaign plan will be developed. This planning and its outputs will serve to establish unity of effort across the staff, component commands and by strategic and supporting headquarters for further planning.

4. **Flexibility.** Until the end state is realized, campaign plans must be continuously adapted to changing circumstances, resources and limiting factors. An important feature of any plan, no matter how detailed, is its usefulness as a common basis for change. Detailed planning cannot be allowed to be so specific as to inhibit flexibility. The commander and staff must build flexibility into the operational design for the campaign. While planners must determine the best sequence of major operations to sustain the required tempo needed to achieve the required end state, it must be recognized that conflict is a two-sided event with complex outcomes. Therefore *contingency planning* must be built into the campaign plan. Contingency plans preserve the commander's freedom of action even under rapidly changing circumstances. They focus effort toward the objective(s) while envisioning sequential and alternate outcomes to proposed actions. This generates opportunities and enables decentralized execution of the commander's plan. Contingency plans can be described in two ways:

- a. **Branch Plans.** Branch plans are contingency operations built into the basic plan for adjusting the ongoing operation if necessary to ensure the maintenance of the overall operational design. They can restore the execution of a plan after a setback, compensate for the unexpected or take advantage of unexpected opportunity. Branches lead to a single end without tying the commander to a single course of action. They are means of adapting the basic scheme to the specific conditions in the operational environment. A plan with branches permits the commander to fight, decline battle or fight in a different way than he originally intended.
- b. **Sequel Plans.** At the operational-tactical level, sequels are plans for subsequent operations based upon the probable outcomes of current operations. Planning and executing a sequel will reduce the risks associated with transition between operations. Sequel plans are always included in the planning process because once the sequel is determined, its requirements will influence planning and execution of current operations. At the strategic-operational level, sequel planning considers follow-on campaigns or major operations and as such extends to conflict termination and even conflict resolution.

5. **Planned Joint and Combined Synergy.** Establishing unity of effort across components is fundamental to joint and combined operations and constitutes the first step in ensuring a truly joint and combined approach.

- a. Joint operations are more than merely multi-service operations and cannot therefore be planned on a land, sea and air plan basis. The concept of component-on-component warfare is straightforward: armies fight armies, navies fight navies and aerospace forces fight air forces. Multi-service operations are also relatively easily understood as enabling the use of additional combat multipliers as in air and sea forces supporting land forces against other land forces by providing fire support, force protection and so on. However, truly joint operations allow the complete spectrum of joint capabilities to be available to engage an opponent across the spectrum of his forces. Thus land, maritime, aerospace, special operations, psychological operations and civil-military capabilities can be employed synergistically against an opponent sequentially and concurrently in the most effective and most efficient manner.

- b. This approach to joint capability planning becomes even more important as the strategic environment for campaign planning includes asymmetrical warfare.
- c. Combined operations also require an analysis of force capabilities, but in addition require comprehension of force limitations, such as in rules of engagement and the requirement for national support and command authority. Specific planning will be required for command and control issues to determine whether components will be best employed by function or by national association or through some combination of the two.
- d. As the contemporary complex operating environment continues to be understood, true joint operations are, in and of themselves, insufficient to meet the challenges the environment presents. The transformation of war requires integration of all elements of national power, civil and military, at all levels of war. Whether termed “whole of government” or a “comprehensive approach” or under some other appellation, civil and military activities must be integrated into a coherent, synergistic whole and this must be built into the campaign plan.

6. **Campaign Plan Format.** There is no standard format for a campaign plan but an outline of the general topics required is included at Annex A to this chapter. Since decentralized execution will be the norm and since the campaign plan is meant to provide concise guidance for developing operations, it does not describe the execution of all phases of the campaign in detail. Indeed, only the initial phases may be described with some tactical certainty. The design for succeeding phases will become increasingly general as uncertainty grows and the situation becomes more unpredictable. However, the final phase, the anticipated decisive action that will achieve the objective(s) and toward which the entire campaign builds, should be clearly envisioned and described.

## SECTION II – CAMPAIGN CONDUCT

### 203. CONDUCT OF A CAMPAIGN

1. The essence of operational design is to apply joint effects in a manner in which friendly strengths are brought to bear on enemy weaknesses, friendly weaknesses are shielded and the enemy is outmanoeuvred in time, space, and legitimacy, forcing him into a position from which the only option is capitulation.

2. Overwhelming application of military force is obtained at the operational level through the synchronizing of joint forces. This is achieved through the application of force, not through components as for multi-service operations, but through consideration of operational functions.

3. **Operational Functions.** Five functions (Command, Sense, Act, Shield, Sustain) are integrated at all the operational and tactical levels of war:

- a. **Operational Command.** Command decisions start and stop action, set objectives, direction, priorities and parameters of the campaign endeavour. This function includes the setting of the decision-action cycle and its attendant planning process. It establishes the command support system, specifies the organization of command and command relationships and establishes the battlespace framework for continued operations. Parallel with and complementary to the command process is the exercise of control. Coordination and integration activities such as information operations, air defence, communication and information systems management, special operations, reconnaissance, etc. are vital command and control responsibilities within a joint force.
  - (1) The use of mission objective assignments to subordinates, the establishment of command relationships by phase and the maintenance of appropriate reserves are the principle means of integrating these endeavours. Commanders must ensure that control arrangements manage the risks to DND/CF personnel and resources when measured against the perceived benefits of the operation. The commander will need to establish the priority of tasks and which will personally be supervised in the execution of the campaign plan.
  - (2) The commander must identify subordinate commanders, establish command relationships and devise a command and control organization. In all cases, the operational commander must balance the need for centralized direction with decentralized execution.
  - (3) Options to be considered for command structure would include through functional component commanders (joint force air component commander, joint force land component commander, joint force maritime component commander, joint force special operations commander), through national component commanders or through some combination of these.
- b. **Operational Sense.** Sense relates to information operations that expand the commander's area of interest and area of influence. They include interaction with media, industry, joint and combined forces, worldwide computer networks and the perceptions of the opposition. The management of information is critical to efficient and effective operations. Tactical intelligence provides information on the environment and on enemy capabilities as they affect combat. Operational intelligence provides information that has an impact on the campaign; it must reflect the broader perspective of operations. Operational intelligence thus must take a wider view over area and a longer view over time. As the operational level of war is less a matter of actual fighting and more a matter of schemes and intentions, operational intelligence focuses less on current combat capabilities and more on forecasting future enemy capabilities, intentions and options.

This is the *Joint Intelligence Preparation of the Battlespace* process that provides the commander with a means to influence rather than merely react to opposing forces. It allows the commander to visualize across the full spectrum of adversary capabilities, to define the battlespace environment, to define the battlespace effects, to evaluate the adversary and to determine the adversary's courses of action.

- c. **Operational Act.** Act relates to the activities of a force that have a direct bearing on the achievement of an objective, a decisive point or a desired effect. It includes the whole range of military operations such as manoeuvre, firepower, information operations, security sector reform, disarmament, demobilization and reintegration, training, governance assistance, humanitarian operations, etc.
- d. **Operational Shield.** Shield is the conservation of the fighting potential of a force, through both active and passive measures, so that it can be applied at the decisive time and place. This function is also known as force protection and it has two components. The first includes all actions that are taken to counter the enemy's fires and manoeuvre by making soldiers, sailors and airmen/women and units difficult to locate, strike and destroy. At the operational level, commanders take measures to protect the force from enemy operational manoeuvre and concentrated enemy air support. Air superiority operations, theatre-wide air defence systems and defence of air bases are important activities associated with operational shield. Operational shield also includes operational security and some information operations. The second component of shield or force protection includes actions to keep soldiers healthy and to maintain fighting morale. It also means guarding their equipment and supplies from loss or damage. Operational commanders ensure systems are in place for adequate medical care, expeditious return of minor casualties to duty and preventive medicine. They protect stocks of supplies and ensure their proper distribution. They provide effective systems for maintenance, evacuation and rapid replacement or repair of hardware. At times, they husband and ration supplies or enforce controls and priorities to ensure strength at the decisive time and place.
- e. **Operational Sustain.** Sustainment comprises those logistical and support activities required to sustain campaigns and major operations. Procurement of resources, prioritization, and allocation of assets are strategic matters but ones that require consultation with the operational commander. Operational sustainment consists of requirement consolidation, apportionment and prioritization and route control. During the campaign, these sustainment capabilities may often limit options for manoeuvre. The campaign commander's concept of operations must therefore be supported by the concurrent development of a concept of sustainment in coordination with the component commanders who will focus their logistics toward given objectives. Sustainment supporting plans provide the continuing means to execute the operational concept. Once a capability is determined to meet supply, transportation, maintenance, construction, medical, personnel and related requirements, feasible courses of action are determined for the campaign. This essential analysis allows for rapid changes to plans. A supporting command structure can execute these plans to sustain the operating forces until major objectives are attained. Such a structure may be based upon a supporting command component or on a multinational combined and joint coordination concept.

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## ANNEX A - CAMPAIGN PLAN CONTENTS

### 1. SITUATION

#### Policy Direction

- Goals
- Objectives
- End State
- Limitations

#### Strategic Direction

- CDS Intent
- Objectives
- Transition conditions
- Assessment of friendly, allied, and host nation strengths and weaknesses
- Theatre of operations/Joint Area of Operations
- Assumptions
- Key Tasks
- Force apportionment or allocation
- Supporting and supported commanders

#### Enemy Forces

- Military strategic intent
- Capabilities
- Actual deployment
- Operational intent and likely plan (including likely decisive points, lines of operation, objectives and end state)
- Major strengths and weaknesses (highlighted critical vulnerabilities as determined)

#### Friendly Forces

- Deployment
- Availability and status
- Other campaigns that will have impact on this one

#### Assumptions

- Alliance/coalition political will
- Enemy intentions and likely reaction of friendly forces
- Likely reaction of third party
- Deployment of reinforcement of friendly forces

### 2. MISSION

### 3. EXECUTION

#### Statement of Commander's Intent

- Operational design and purpose
- Objectives and transition conditions
- Centres of Gravity (if applicable): friend, foe, allies
- Decisive points

Constraints and restraints (devolved)  
Risk assessment

### **Concept of Operations**

How the campaign will be conducted to realize intent  
Lines of operations  
Sequencing and phasing in terms of desired effect  
Main Effort (overall and by phase)  
Culminating points and operational pauses  
Deception

### **Tasks**

By phase, noting supporting/supported commands

### **Mission Planning Guidance**

Canadian Joint Maritime Component Commander (CJMCC)  
Canadian Joint Land Component Commander (CJLCC)  
Canadian Joint Air Component Commander (CJACC)  
other components

### **Coordinating instructions**

G-Day  
D-Day  
Other key timings  
Rules of Engagement  
Public Affairs  
Targeting

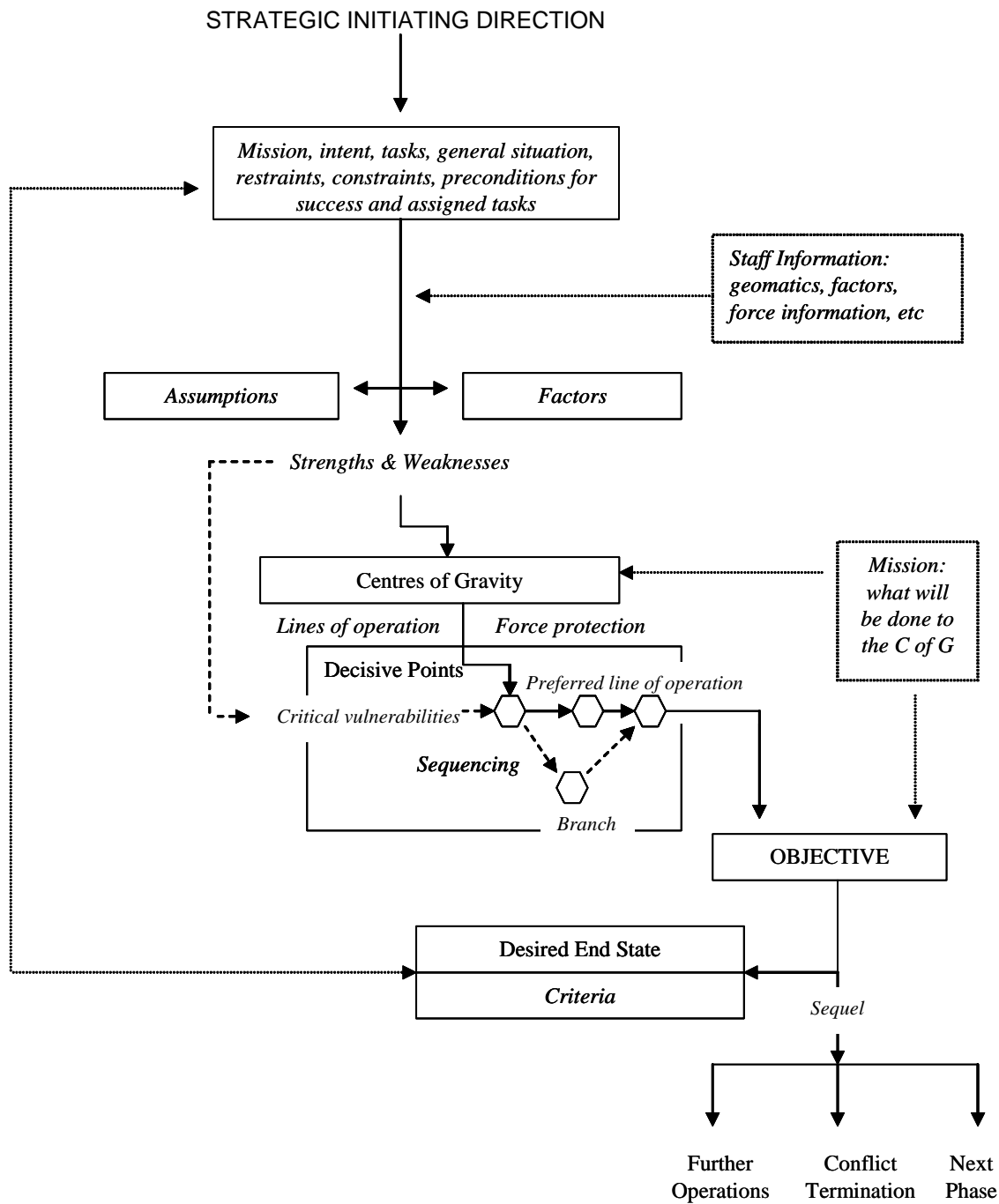
## **4. SERVICE SUPPORT/LOG CONCEPT**

Key points, critical issues of logistics concept, movements, medical support, host nation support and personnel

## **5. COMMAND AND SIGNAL**

Command arrangements and command and control concept  
Communications arrangements

**ANNEX B - CAMPAIGN PLANNING**



**Figure B-1 Campaign Planning**

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**CHAPTER 3**  
**OVERVIEW OF OPERATIONAL PLANNING**  
**SECTION I - CONCEPTS AND PRINCIPLES**

**301. CONCEPT OF AN OPERATIONAL PLANNING PROCESS**

1. The CF OPP is a coordinated process to determine the best method of accomplishing assigned operational tasks and to plan possible future tasks. Planning may be inhibited by inadequate information, insufficient time and limited resources. The planning process is designed to optimize logical, analytical steps of decision making in conditions of uncertainty and ambiguity.

2. **Application.** The planning process is applicable to any type of operation. It applies to both Deliberate Planning and Rapid Response Planning. While the objectives and the stages of the planning process remain the same, a commander will selectively exclude or limit some of the planning tasks in order to meet time limitations in a rapid response -planning situation.

3. **Objectives.** The objectives of the planning process are as follows:

- a. to standardize the planning process within the CF;
- b. to ensure strategic/political control is maintained during the development of a plan;
- c. to translate political goals, objectives, priorities and end state into strategic and operational-level objectives;
- d. to enable commanders to guide development of the plan including the synchronization of operational combat functions; and
- e. to maximize the commander's and staffs' creative thinking and associated thought processes.

4. **Output.** The output of the planning process is a plan or an operations order (OP O), designed to achieve an assigned mission and produce a desired end state.

**302. DESIGN OF THE PLANNING PROCESS**

1. The planning process is applicable to all CF operations. It consists of five stages, leading from the initiation of planning through to plan review. It is cyclical, as necessary, to keep a plan current. The five stages, which mirror the NATO Bi-SC Guidance on Operational Planning, are as follows:

- a. Initiation,
- b. Orientation,
- c. Course of Action (COA) Development,
- d. Plan Development, and
- e. Plan Review.

2. Proper orientation of the planning process is critical to the success of the plan. It is therefore essential that clear direction from the strategic level be provided and that political/strategic goals be articulated before planning commences. The planning process should provide maximum freedom to the staff to consider ideas and concepts in order to develop a wide range of COA. As planning progresses,

some of the COA may be found less practical than others and these may be rejected once they have been analysed.

### 303. OPERATIONAL PLANNING FACTORS

1. The CDS or any authorized subordinate commander, such as the commander of an Operational Command, may initiate operations planning. This top-down activity enables senior commanders to communicate their intentions to subordinate commanders and forces, so that they, in turn, can make the necessary preparations as part of a concerted effort.
2. Commanders and their staffs must consider a number of factors when planning an operation.
  - a. **Standard Procedures.** Established procedures provide a consistent logical approach to each planning task. Use of standard procedures ensures speed and thoroughness.
  - b. **Concurrent Planning.** While it is not always possible, staffs should endeavour to maximize the effects of concurrent activity. Commanders will provide the various elements of the staffs with the direction and information they need to develop their parts of the plan or plans at the earliest practical time. Staffs of subordinate commands must receive maximum possible warning time to complete preliminary planning activities.
  - c. **Coordination.** The various provisions of the plan, particularly the warfighting functions, must be in consonance. Staffs must recognize their responsibility for this coordination and exercise it in a methodical, step-by-step manner.
  - d. **Planning Staff.** Commanders must recognize the level of knowledge and experience of their planning staffs. If it is necessary to form staffs on an *ad hoc* basis, commanders must articulate their direction unambiguously, and must insist that the staffs clearly understand the CF planning process.
  - e. **C2 Relationships.** To avoid confusion and to ensure unity of command, commanders and staffs must consider C2 relationships and method of command in some detail, especially when dealing with allied or coalition forces.
  - f. **Command and Staff Liaison.** It is essential to establish and maintain liaison with allied forces as well as higher, lateral/flanking and subordinate commanders and staffs.
  - g. **Integration of other Governmental Departments.** It is essential to integrate the planning process and eventual operations with the efforts of other governmental departments such as DFAIT and CIDA.
  - h. **Development Time.** The complexity of an operation may lengthen the time needed to develop plans; this may become a planning factor in itself.
  - i. **Timely Publication.** Commanders should distribute Wng Os, PLANS, OP Os and, if required, annexes and supporting plans (SUPLANS) as soon as possible. Delays, designed or instituted to achieve an elusive degree of excellence are counterproductive.
  - j. **Assessment of Risk.** Commanders must assess the risks involved with a particular operation and establish controls to eliminate or mitigate the risks. This process must be completed in accordance with B-GJ-005-502/FP-000 *Risk Management for CF Operations* until the residual risk reaches an acceptable level.
  - k. **Information.** Commanders must determine and communicate their critical information requirements early in the planning process. In turn, staffs must be prompt in making relevant information available to planners.

- l. **Assumptions.** In the absence of fact, it is essential to identify and describe any assumptions that are sensitive to change or that would significantly affect the outcome of the plan. Staffs must continuously monitor these assumptions for indications of change and incorporate new information into the plan.
- m. **Logistics.** Logistic support for an operation is both indispensable and complex. Deployed forces will depend on support from CANOSCOM and other CF logistics support systems. Staffs must identify logistic dependencies and advise the responsible agencies as soon as possible.
- n. **Reconnaissance.** As early as possible, the commander will order a reconnaissance (recce) mission to the area of operations. The recce team shall include representatives from both strategic and operational-level staffs. CEFCOM maintains the *Reconnaissance Support Checklist for CF Operations*, which includes composition of the recce team and detailed checklists.
- o. **Geomatics.** The staff must define the requirement for and availability of geomatics products at the outset of planning, to facilitate timely acquisition of these products and to push them to planners as appropriate.
- p. **Use of Force.** Responsible parties at the appropriate political and military levels must agree on the uses of force required to achieve the mission successfully. B-GJ-005-501/FP-000, *The Use of Force in CF Operations*, contains detailed procedures for the requesting and promulgation of rules of engagement (ROE) that control the use of force.
- q. **Legal Considerations.** Staffs should initiate early consultation with the SJS, Canada COM or CEFCOM Legal staff on aspects such as the Law of Armed Conflict (LOAC), Status of Forces Agreements (SOFAs), Host Nation Support (HNS) agreements, inter-theatre civil law, etc.
- r. **Public Affairs (PA).** PA requirements and their impact on the plan are an integral part of the process.
- s. **Civil-Military Cooperation (CIMIC).** As early as possible, the TF Comd must establish workable relationships with government, civil agencies and the civil population in the area of operations. Specific concerns include supply, facilities, services, labour and movement of civilian populations and refugees.
- t. **Estimated Timings.** Time estimates, in relation to preparation, movement and build-up of personnel, materials and supplies, are critical to the success of the operation.
- u. **Information Operations (IO).** IO requires coordinated, high-level planning to ensure relevance to the mission objectives and consonance with the overall strategy for the mission. The IO annex should identify weaknesses, target audiences and suitable themes, and include guidance on media use.
- v. **Impact of operations on the environment.** Canadian defence policy compels planners to consider the environmental impact of operations. The staff must arrange for an environmental assessment, to ensure that the TF Comd may take all practicable measures to minimize damage and to avoid needless or inadvertent violation of environmental laws that apply in the area of operations.
- w. **Review Procedures.** Staffs must follow review procedures, both for initial approval of plans and for subsequent updates. Each formation-based HQ must designate a point of contact (POC) for the coordination of planning activities and plan review. The NDHQ POC is the SJS.

- x. **Infrastructure.** Operations planners must consider the condition of existing infrastructure for lines of communication (LOC) and for accommodating a deployed force. Lack of facilities may necessitate increased HNS, allied support or a surge-effort prior to force deployment.
- y. **Intelligence, Surveillance and Reconnaissance (ISR).** ISR is the capability that combines command direction, surveillance and reconnaissance sensors, and processed Information and Intelligence (I2) to provide a timely fused multi-source I2 picture to the Common Operational Picture.
- z. **Finance.** The source of operational funding, foreign currency requirements and financial aspects of mutual support arrangements in coalition. NATO or UN operations can be critical factors in planning operations.

#### 304. VIABILITY REQUIREMENTS

1. During operations planning, staffs may propose many different COAs to accomplish military missions deriving from Government policy and/or taskings. To be viable, each COA must meet the following essential criteria:

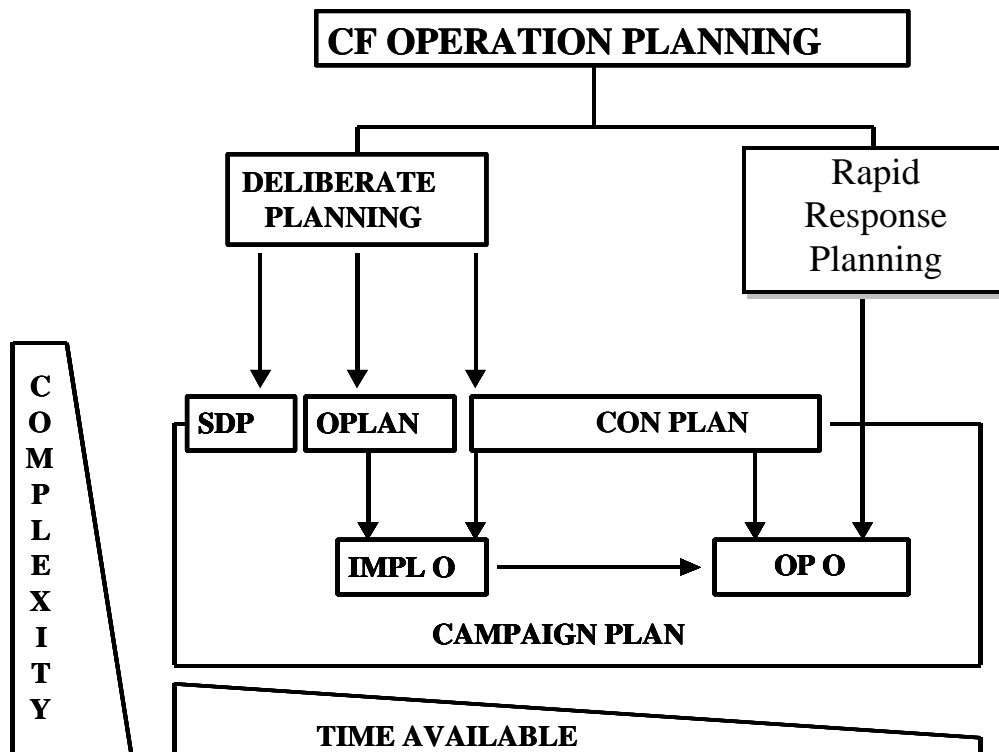
- a. **Suitability.** Staffs must review and test every proposed COA to determine if it can accomplish the military mission and achieve the desired end state.
- b. **Feasibility.** Are there sufficient resources available and in-theatre to conduct and sustain the operation?
- c. **Acceptability.** Is the COA militarily prudent, that is, do the probable results justify the estimated costs in terms of potential losses in time, materiel and military personnel?
- d. **Compliance.** Does the COA comply with approved CF doctrine, applicable policy, regulations, legislation and guidelines?
- e. **Exclusivity.** Is the COA fundamentally different from the others that are being developed?
- f. **Completeness.** Does the COA, as presented, clearly identify the force requirements, timings, phasing, and objectives?



**SECTION II - OPERATIONAL PLANNING TERMS**

**305. PLANNING CATEGORIES**

1. **General.** In order for the CF to undertake the full spectrum of its roles and missions there are two planning categories: Deliberate Planning and Rapid Response Planning.
2. **Deliberate Planning.** This is formal planning for routine or deliberate contingency operations for which the location and nature of the operation is known or anticipated. Planning for these operations is typically driven top-down. At the strategic level this means that deliberate planning will often involve numerous interactions between the DND/CF and the GoC. Furthermore, the provision of military advice to the GoC may, depending on the sensitivity of the issue, require presentation of operational or even tactical level courses of action for GoC approval. While time to produce the plan may be a limitation, the time to commencement of the operation is not considered a significant factor.
3. **Rapid Response Planning.** Rapid Response Planning is mission planning, often abbreviated, in response to an immediate or sudden crisis, the timing of which could at best be predicted with very short-notice. While the CF response may be drawn from an existing CONPLAN, there may be a requirement for considerable strategic level coordination to ensure adequate authorities, resource allocations, and support structures are in place. It is important to realize that in time of domestic crisis, planning by our civilian partners is often driven bottom-up, originating at municipal, provincial or regional levels, and that this will have an impact on CF planning.



**Figure 3-1 Operational Planning**

**306. ORDERS**

1. **Warning Order (Wng O).** A Wng O is an operational or tactical level notice of an impending operation and an order that is to follow. It provides as much information as practical and maximises the available planning time provided to subordinate commands to allow them to prepare for the operation in

the shortest time possible. When preparing a Wng O (Annex A to Chapter 5), staffs should consider the following:

- a. Wng Os should not be delayed for lack of detailed information, but should be issued as soon as possible, with additional details being provided through supplementary Wng Os; and
- b. Wng Os, which require movement, should clearly state a time before which movement is not authorized. This requires that an additional Wng O be issued before that stated time, either giving actual movement times, extending the period before which movement is not authorized or placing troops at a degree of notice to move.

2. **Operations Order (OP O).** An OP O is an operational or tactical level directive, usually formal, issued by a commander to subordinate commanders for the purpose of effecting the coordinated execution of an operation. An OP O is prepared in response to a current or developing crisis and addresses a mission that the Government has specifically tasked the CF to prepare and execute. They are normally preceded by a Wng O and may be developed at any command level. OP Os are the normal final outcome of Rapid Response Action Planning and are produced in sufficient detail for execution. A commander may disseminate an OP O by any means, including verbal, if required.

3. **Fragmentary Order (FRAG O).** A Frag O (Annex J to Chapter 5) is an abbreviated form of an OP O, issued as required to amend a previously issued OP O. The Frag O will include only the parts of the original OP O that have changed. The Frag O should conform to the same sequence as an OP O and all five-paragraph headings must be used. After each heading, regardless of the paragraph, the issuing authority will send either "No Change" or the new information. This ensures that recipients know that they have received the entire Frag O. Not every situation requires a restatement of paragraphs 2 and 3. For example, a commander may change only his "Task Org", or his priority of support. These decisions would require a Frag O, but would leave all other portions of the order as "No Change."

4. **Implementation Order (IMPL O).** An IMPL O (Annex H to Chapter 5) is the mechanism used to direct the implementation of an OPLAN or CONPLAN. It has no other purpose. If anything other than minor changes / updates are required to the plan to permit its execution, then an IMPL O is not appropriate and an OP O must be developed.

5. **Termination Order (TERM O).** A TERM O (Annex L to Chapter 5) is issued to terminate an operation formally.

6. **CDS Directive.** The purpose of a CDS Directive is to communicate the establishment of a policy or to order the execution of an operation. It is issued when legal or government authority exists or is granted to undertake a relatively complex or large-scale operation.

### 307. PLANS

1. **General.** A plan is a proposal for executing a command decision or project; it is not normally an executable document. It is prepared in the deliberate planning environment and represents the command's preparation for future or anticipated operations. Plans are usually initiated at the strategic and operational levels. Because plans concern future operations and help the staff make assumptions about the nature of the situation at the time of execution, they cannot remain static. As the commander and staff change or adjust their estimates to reflect the current analysis of this situation, they must also change the plans to reflect the results of this analysis. There are four types of plans: OPLAN, CONPLAN, SUPPLAN and Campaign Plan. The terms "draft", "advance" and "final" may form part of the title of these plans.

2. **Operations Plan (OPLAN).** An OPLAN (Annex I to Chapter 5) is an operational or tactical level plan prepared through the deliberate planning process to address a known defence mission that will be executed within a specified time period. It is typically produced when the defence mission is critical to national security and extensive coordination of complex issues is required. An OPLAN is a complete and

detailed plan that identifies the specific forces, functional support, and resources necessary to implement the plan. OPLANs are based on an Initiating Directive and are produced in co-ordination and consultation, with relevant subordinate commanders, civil authorities and nations. An OPLAN may be implemented at a prescribed time, on signal or through an IMPL O when the conditions of execution occur and an execution time is determined, and then becomes the OP O.

3. **Contingency Plan (CONPLAN).** A CONPLAN (Annex E to Chapter 5) is an operational or tactical level plan prepared to address possible future security risks or in response to a current or developing crisis. A CONPLAN reflects potential response options but no specific time is set for the operation until higher authority approves the execution of the CONPLAN. It is initiated by the staff or by an Initiating Directive based on known or assumed planning factors resulting from confirmed intelligence or approved assumptions, limitations and constraints. A CONPLAN is produced in as much detail as possible, including all appropriate supporting annexes, in co-ordination and consultation with relevant subordinate commanders, civil authorities and Nations. A commander may implement a fully developed CONPLAN at a prescribed time, in accordance with prescribed measures (for example, NATO precautionary measures) through an IMPL O or on order. However, if more than minor changes or updates are required then an OP O must be developed. The Initiating Authority approves subordinate level CONPLANS.

4. **Supporting Plan (SUPLAN).** A SUPLAN (Annex F to Chapter 5) is an operational or tactical level plan supporting a plan by providing detailed direction and information on a particular aspect of the plan. It can be a stand-alone document or can be incorporated as an annex within the supported main plan. The staff should prepare stand-alone SUPLANS to address an unusually high volume or complexity of direction and data, (that is, too much for an annex). A SUPLAN must contain sufficient information about the plan it supports to satisfy users who do not receive the basic plan. The agency providing the support develops the SUPLAN, which must be approved by the supported commander and the next higher commander.

5. **Campaign Plan.** A campaign plan articulates the operational design aimed at accomplishing national, strategic and operational objectives. A campaign plan is prepared when contemplated military operations exceed the scope of a single major joint operation. Thus, a campaign plan provides the framework for a series of related plans or orders aimed at accomplishing a strategic or operational objective within a given time and space. Campaign planning may begin during deliberate planning when the actual threat, national guidance, and available resources become evident, but may not be completed until after the CDS or operational commander select the course of action during rapid response action planning.

### 308. OTHER PLANNING DOCUMENTS

1. **CDS Planning Directive.** The purpose of a CDS Planning Directive is to formalize the initiation of strategic and operational level planning and, in some conditions, direct prudent preparations for a contingency operation. It is issued for contingencies that can reasonably be anticipated.

2. **CDS Initiating Directive.** The purpose of a CDS Initiating Directive (ID) is to formalize the initiation of strategic and operational level planning and communicate the deductions of a strategic assessment, either concurrently or following its completion. A CDS ID will state planning assumptions, define desired strategic objectives, outline CDS intent, impose appropriate limitations, appoint Supported and Supporting Commanders, identify key planning milestones and provide an initial estimate of available forces authorized for planning (force apportionment). While the CDS ID initiates planning, it does not confer the authority to execute an operation. It may, however, authorize reconnaissance, heighten readiness states and permit preliminary movement. A recommended format for an Initiating Directive is included at Annex M to Chapter 5.

3. **Planning Guide (PG).** PGs provide planning guidance in specific areas to operations planners. The intent of these guides is to supplement the planning information available within approved doctrine, the Defence Plan, Directives and other documents. PGs should not repeat information available from these source documents but rather, detail unique planning considerations within a specific area that are not covered elsewhere. The format of a PG normally follows the OPLAN format as outlined in Chapter 5.

4. **Concept of Operations (CONOPS).** The completion of a CONOPS document is the preliminary step in the development of an operational plan or order. The CONOPS expresses the military commander's intentions on the use of forces, time and space to achieve his mission, objectives, and end state. It includes how the capabilities of the available resources are to be synchronized towards this goal. The CONOPS is the final output of the Course of Action Development Stage of the OPP and is submitted for approval, in document form, to the appropriate Initiating Authority, before proceeding to the plan development stage. A CONOPS document usually consists of a situation overview, mission statement, commander's intent, outline concept for execution, force capability requirements, outline logistic support concept and key command and control arrangements. The CONOPS does not include any of the detailed annexes found within a fully developed plan or any supporting plans.

### **309. APPROVING PLANNING DOCUMENTS**

1. The CDS issues strategic-level plans, directives and orders. The CDS normally approves operational CONOPS and campaign plans, following which the operational commander may issue the follow-on Op O, CONPLAN etc. A TF Commander, once deployed for operations, approves all operational-level plans and orders related to the overall mission.

## SECTION III – OPERATIONAL LEVEL PLANNING

### 310. INTRODUCTION

1. Operational planning is a cyclical process. Operational level planning begins based on direction from the CDS, or another superior commander.
2. Regardless of the planning environment, the planning process outlined in chapter 4 is applicable to the operational-level in any size theatre and with any size force. However the activities and outputs applicable to each stage may vary in nature and detail depending on the circumstances, for example time, complexity or sheer size of the problem to be resolved.
3. The only difference between deliberate and rapid response planning is the final output. Rapid response planning is the method by which the mission is identified, a solution is selected, a plan is developed, and operational directives are issued (that is a Campaign Plan or OP O). By contrast, deliberate planning is the method by which a possible or probable mission is identified, a potential solution is selected, a broad plan is developed, and a plan is produced. Thus, rapid response planning normally results in the issuing of Wng O in anticipation of implementation by the CDS, and deliberate planning results in the production of a plan that would be held in reserve for future use. By having an extensive array of current plans available, the operational commander would be able to expedite the issuing of timely orders should he activate rapid response planning in response to a mission similar to one already addressed in a CONPLAN.
4. Deliberate planning can change to rapid response planning at any point in the process. Any time the degree of urgency changes during planning the staff can go from one process to the other. The operational command could commence planning, using the deliberate planning method, and then switch to rapid response planning on direction from the Government or the CDS, or because of some critical event, such as a request from the UN or NATO.
5. **Rapid Response Planning.** Rapid response planning implies not only that time for the planning process will be short, but that it is also likely that information and resources will not be readily available. These three restrictions will require the commander to be more closely involved and to exercise more direct control over the planning process. The essential variations to the planning model are:
  - a. **Initiation.** The initiation is likely to be brief, with minimal guidance. As the situation unfolds either the strategic objectives may change until a political or coalition decision is achieved. This will require the commander to make assumptions from the outset to expedite the process;
  - b. **Orientation.** This stage remains unaltered, as it is indispensable for effective, efficient planning. The commander will, however, be more concise, even to the point of specifying initial COAs in the Planning Guidance. This is necessary to narrow the scope of the staff's work and expedite the planning process;
  - c. **COA Development.** The staff may have minimal time to check the guidance provided by the commander. Therefore, following staff checks, an abridged analysis of the factors is produced to analyse the various courses of action. It is unlikely that an Information Brief will be required, since the staff preparing the final staff check, the commander and the component commanders will all be intimately involved with the details of the situation by this stage. A Decision Brief will be conducted for the same reasons it is conducted during deliberate planning; however, it will focus on the viability of the COAs. A CONOPS will be produced based on the information provided and the decisions made at the Decision Brief. The CONOPS will be submitted to the initiating authority for approval. CONOPS approval by the initiating authority is normally a prerequisite for the full development of a plan or OP O but depending on the nature of the time constrains planning may proceed concurrently as the CONOPS is staffed;

- e. **Plan Development.** While the initiating authority will approve the CONOPS, the urgency of the situation may preclude submission of the detailed plan for subsequent approval. If time is available, the completed plan should be approved by the initiating authority; but if time is short, the TF Comd will normally have the authority to carry out the plan once the CONOPS is approved; and
- f. **Plan Review.** This stage is unlikely to be conducted prior to the execution of the plan unless the urgency of the situation decreases.

### 311. INITIATION

1. Upon receipt of higher direction, or under the direction of the commander, the planning process will begin. When the initiating directive/Wng O is received, it will indicate whether rapid response or deliberate planning is required. This may occur as a result of routine (or, in a crisis, ad hoc) national assessments or intelligence gathering sources indicating that Canada's national interests are being, or may be, threatened.

### 312. ORIENTATION

1. The Orientation Stage is where the commander must place his personnel energies to ensure that subsequent activities are focused. However, the commander should be careful not to confine the thinking process of the staff, by providing too much direction. This stage produces two products: the Mission Analysis Brief and the commander's Planning Guidance. During this stage, the commander determines the mission and provides planning guidance to orient his staff and allow further planning by the staff/subordinate commanders.

2. **Mission Analysis.** After the commander receives/initiates direction, the principal task is to conduct a mission analysis prior to orienting the staff. The process of mission analysis is cognitive and may be conducted through a brainstorming process. Initially, the general considerations (developing situation and geographical conditions) should be reviewed to note any aspect which must be included in the analysis of the mission and which affects the tasks, constraints, restraints or intentions of the issuing authority.

3. Mission analysis should be conducted by the commander and selected senior staff. They will determine what has to be accomplished, where, by whom, by when, and why. The mission analysis leads the commander towards the production of the mission statement, commander's Planning Guidance, campaign plan (see chapter 4), or if the analysis was generated by the commander, an initiating directive to a subordinate commander. The commander or senior staff then uses these products to orient the planning staff in their COA development.

4. Mission analysis must consider the relative end states, assigned and implied tasks, constraints and restraints, and the intention of the higher commander. All missions must be analysed in the context of their relationship to the system of systems that will exist in the theatre of operations. There are many methods currently in use that can assist in this process depending on the time available and the complexity of the situation. Concepts such as Systemic Operational Design, Strange Analysis and Operational Net Assessment all aim at developing a complete understanding of the environment that will aid decision-making. . Once the relationships of the mission to the environment are established, each influencing factor (tasks, intention, etc) is quantified by its relative significance and impact on achieving the desired effects on the system or the enemy. When information is unavailable or circumstances are likely to be unpredictable, it will be necessary to make assumptions.

5. **Mission Statement.** The distinction between a task and a mission is often unclear and the terms are frequently used interchangeably. For the purpose of planning, a clear distinction must be made between a task and a mission. A task is a job or function assigned to a subordinate unit or command by higher authority. The subordinate's mission is derived from the task(s) assigned or implied by a higher authority and should include the reason for the task. In simple terms, a mission is a task with a purpose

(mission = task + purpose). The task assigned by higher authority and its contribution to the mission of that higher-echelon commander serves as the basis for developing the subordinate's mission.

6. The mission statement is not a separate product but is articulated in the commander's Planning Guidance, as a clear, concise statement detailing who will conduct the operation, what is to be done, when it will take place, where it will occur, and why it is being conducted.

7. The mission statement is derived from a step-by-step examination of assigned and implied tasks, restraints, constraints, and higher commander's intent. Each of these functional groupings (assigned tasks, implied tasks, restraints and constraints) should be considered with respect to its relevance to the enemy vulnerabilities and friendly end state. The information within each group should be ordered in priority of significance based on this analysis. In some cases factors will overlap while in others factors will be contradictory. Regardless, the process is iterative and continuous until each factor has been either incorporated into the mission statement or rejected because it lacks relevance to the end state.

8. Finally, the mission statement is reviewed to ensure that it has the potential to achieve the end states, which describe the strategic goals. These end states should have been defined in the initiating directive. If they have not previously been defined, the commander will complete the mission analysis and determine the military conditions or the military end state that will define mission accomplishment. It should also be noted that mission statements, although essential at the tactical level to unify the action of multiple elements into a single succinct understanding of the task at hand, start to lose some of their utility in providing a clear and concise statement at the operational level. Indeed, the multidimensional nature of operations at the latter level can either lead to a generic and meaningless mission statement (e.g. Conduct operations...) or one in which painting the nature of the mission merely leads to repetition of strategic objectives. In strategic directives, mission statements may not be given, particularly since an armed force such as the CF is typically involved in the pursuit of many separate, simultaneous and multidimensional operations. The utility of a traditional mission statement at the operational level will have to be examined on a case-by-case basis by the TF Commander and the staff.

9. The COS or J5 Plans presents the information developed during the mission analysis in a Mission Analysis Brief to the TF Commander who approves the results of the Mission Analysis step. The TF Commander may invite subordinate commanders to attend the Mission Analysis Brief. The TF Commander produces planning guidance and this information is provided to the TFHQ staff using an Orientation Briefing in the format provided at Annex C to Chapter 5.

10. **Commander's Planning Guidance.** The final output of the Orientation Stage is the commander's planning guidance. To orient the staff, the commander should present the results of the mission analysis using the format of the estimate (Chapter 5, Annex B). The commander should provide sufficient information to permit the completion of paragraphs 1-3 and to develop a framework of paragraph 4.

### 313. COURSES OF ACTION DEVELOPMENT

1. If constrained by time the commander may limit the COAs to be considered to one. Otherwise, the COS/J5 Plans use the direction contained in the commander's Planning Guidance to coordinate a staff analysis that will lead to the development of initial COAs. The COS/J5 Plans develop broad initial COAs so that individual staff branches can focus their staff analysis and it can be determined whether the initial COAs meet the viability requirements outlined at article 304. Once the staff analyses have progressed sufficiently, the initial COAs, along with any other relevant facts/question would be briefed to the commander during the Information Briefing. At the conclusion of the briefing, the commander may discard some of the COAs and will provide further direction to enable the staff to focus on further refining the remaining COAs. The refined COAs will be presented to the commander in the next stage so that he may select the preferred COA during the Decision Brief. The final product of this stage is a series of COAs derived from a comprehensive, logical cross-function estimate.

2. **Staff Analysis.** The purpose of the staff analysis is twofold: to determine the factors and deductions relevant to the mission, and to ascertain whether the mission is achievable given the current limitations of time and resources. During the analysis, information will be obtained which will be of value to other staff branches. Consequently, this step is iterative and dependent on the expeditious transfer of information.

3. The number of staff cells involved in conducting staff analyses is dependent upon the actual number of staff branches and special advisers in the HQ and their relevance to the mission. The COS/J5 Plans would be prudent to identify the specific staff requirements at the time the commander's Planning Guidance is issued. This will smooth the coordination of the staff activities, although as a general rule it is more convenient to have each branch (for example J1, J2, J3, J4, J5, and J6) conduct their respective staff analyses for the areas for which they are responsible. The staff analysis process is iterative and involves a continuous exchange of information amongst the staff. Each staff branch conducts an analysis of the factors affecting the achievement of the mission from their particular perspective. On completion of individual staff analysis, a coordination meeting is recommended to ensure that all the relevant information is available for the development of the COAs.

4. COAs are produced under the direction of the COS/J5 Plans. The COS/J3 Plans will coordinate the development of the COAs and associated staff checks and prepare the Information Brief. During COA development, movement, logistics and sustainment may be the key considerations in the planning process.

5. **The Information Brief.** The Information Brief (Annex D to Chapter 5) may take any format; however, it should be brief, and concise and follow a logical sequence, similar to the organization of an estimate. The J5 Plans (or the COS) will orchestrate the briefing using representatives of the various staff branches to address their respective responsibilities as required. At the Information Brief, the commander will consider the information provided by the staff and give further guidance for the development of COAs by directing the investigation of additional COAs, the abandonment of suggested COAs, or refinement of the initial COAs. The Information Brief also provides an opportunity for the component commanders to provide direct advice to the commander on their respective forces' capabilities with respect to the initial COAs.

6. **Final Staff Checks.** On completion of the information brief the staff will further refine the COAs selected by the commander as best suited to achieving the end state. The staff will conduct further checks and make amendments based on input by the commander. The refined COAs will be presented to the commander at the Decision Brief where the COAs shall be compared and recommendation of the best COA shall be made to the commander. A method of comparing COAs is wargaming, which can be conducted manually or, if time permits and resources are available, can be computer-assisted.

7. At the Decision Stage a recommendation and substantiation is made regarding the preferred COA. The commander will consider the staff's advice in conjunction with the mission's requirements and decide on the COA for development.

8. **Decision Brief.** The Decision Brief should follow the standard format (Annex D to Chapter 5). It should be brief, and concise and follow a logical sequence, similar to the organization of an estimate. The COS/J5 Plans will orchestrate the briefing using representatives of the various staff branches to address their respective responsibilities as required. If the attendees are the same as the Information Brief, the Decision Brief may be abridged. Regardless, the COS will decide the detail necessary to ensure that the commander is provided with adequate information to make a decision and that other staff and subordinate commanders gain a thorough understanding of the considerations, which will lead to the commander's preferred COA. The commander may use the Decision Brief forum to solicit the component commanders' advice on COAs.

9. **Concept of Operations.** Unless the commander must brief a range of COAs to higher HQ, he may develop the selected COA from the Decision Brief into a CONOPS. The format of the CONOPS is the same as that for an OP O. The CONOPS normally places more emphasis on the rationale for the operation as opposed to developing the detail included for an OP O. Tasks for formations and units may



be identified and dates will be based on the best information available. It must contain sufficient detail to express the commander's view of the overall conduct of the forthcoming operation. The CONOPS may then be presented through the chain of command as a written, verbal or graphic brief for endorsement. The CONOPS:

- a. expresses the commander's methodology and rationale for attaining specific strategic goals or end states;
- b. advises higher command of the commander's intentions and ultimately provides an instrument for the CDS to review and seek political agreement, if required; and
- c. informs subordinate commanders and supporting agencies of the scope and nature of required SUPLANS.

10. **Endorsement.** The CONOPS will be presented to higher command approval in accordance with the original initiating directive; this may be accomplished through a back brief. An approved CONOPS may be further developed into a CONPLAN within the deliberate planning environment or into an OP O in the crisis response environment. Following endorsement of the CONOPS, copies will be sent to all HQ and formations, which are, or will be, involved with the further development of the plan.

### 314. PLAN DEVELOPMENT

1. In the deliberate planning environment, the CONOPS is developed into a plan (Chapter 5, Annex E). If a plan is developed, it should be prepared in sufficient detail to execute, following a staff check and minor revisions. Rarely will there be sufficient resources to maintain CONPLANS at a high state of readiness. The more pragmatic view is that the CONPLAN should be prepared to the detail necessary for it to form the basis for rapid response planning.

2. In the crisis environment planning should proceed to the preparation of an OP O.

3. **Staff Action.** The finalized plan in whatever format will be circulated to those units that will be responsible for the implementation of the plan or order once the higher commander authorizes it. The final step is to confirm the enduring applicability of the plan through the Review Stage.

### 315. PLAN REVIEW

1. A plan/OP O must be reviewed regularly to evaluate its viability. The evaluation may be conducted through exercises, wargaming or techniques such as logistics flow modelling. In terms of time and quantifiable results, the most effective method may be computer-based war games. However, an independent staff analysis (that is by officers not directly involved in plan preparation) is also an effective evaluation method. The choice of review methodology will be dictated by time and the availability of resources. If major changes are required and time permits, the planning process should be recommenced from the Orientation Stage. Plan Review has two major applications: Progress Review and a Periodic Review.

- a. **Progress Review.** In the planning and execution phases, orders must be continually reviewed. This is essential to ensure that required changes can be incorporated to ensure the mission continues to be achievable. Changes to Wng Os are made by issuing supplementary Wng Os and the OP O is changed by issuing Frag Os.
- b. **Periodic Review.** All plans have a limited period of validity due to the changing circumstances upon which they were based. Plans and associated SUPLANS must be reviewed at least every 24 months.

2. The planning staff will maintain a register of plans, which indicates their status, date of review, authority and commander's acknowledgement.

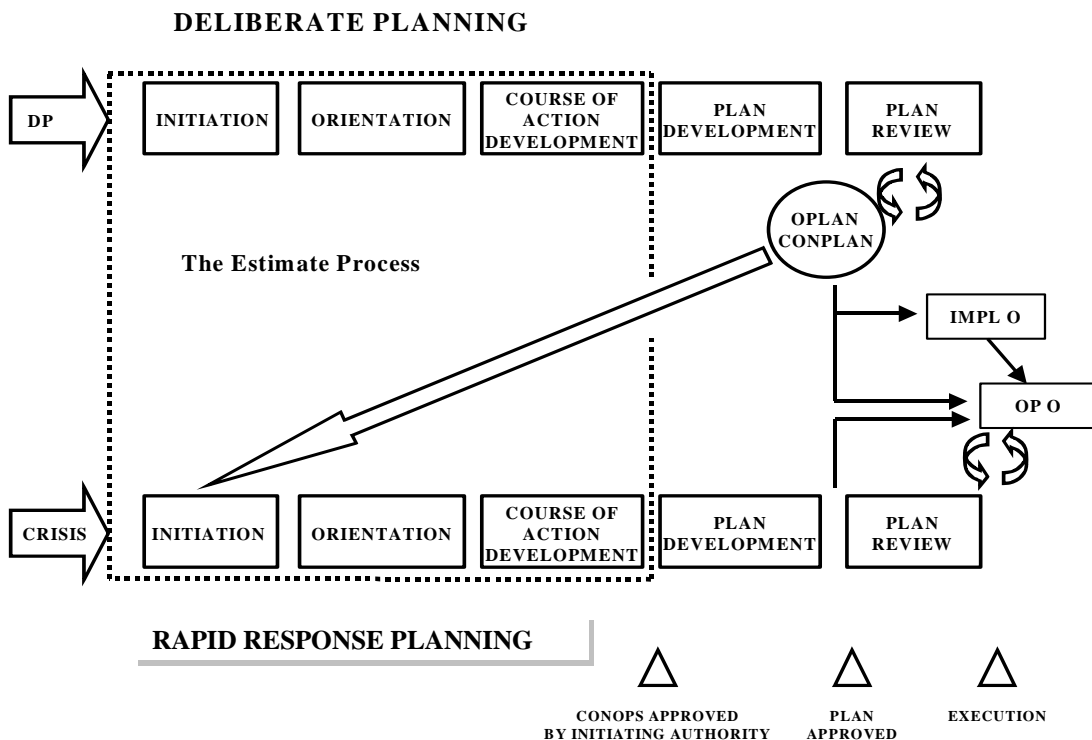
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**CHAPTER 4**  
**THE OPERATIONAL PLANNING PROCESS**  
**SECTION I - THE PLANNING PROCESS**

**401. INTRODUCTION**

1. The responsibilities associated with the five stages of the planning process are not always clear. Thus, there are some areas of operations planning where it is impractical to state, in advance of an operation, who will perform which planning functions or tasks. Therefore, coordination between the strategic and operational planning levels is essential if a seamless transition of responsibilities is to be made as the process develops. The five planning stages will become unique activities at the strategic and operational levels.

3. Figure 4-1 The Rapid Response and Deliberate Planning Process, below, shows the general process flow for both the rapid response and deliberate planning environments. The first three stages, the estimate, comprise the process to arrive at the Concept of Operations (CONOPS). When there are severe time limitations a commander may further limit the rapid response process fully accepting that there are risks involved. An example of an abbreviated version is at Annex A to this chapter.

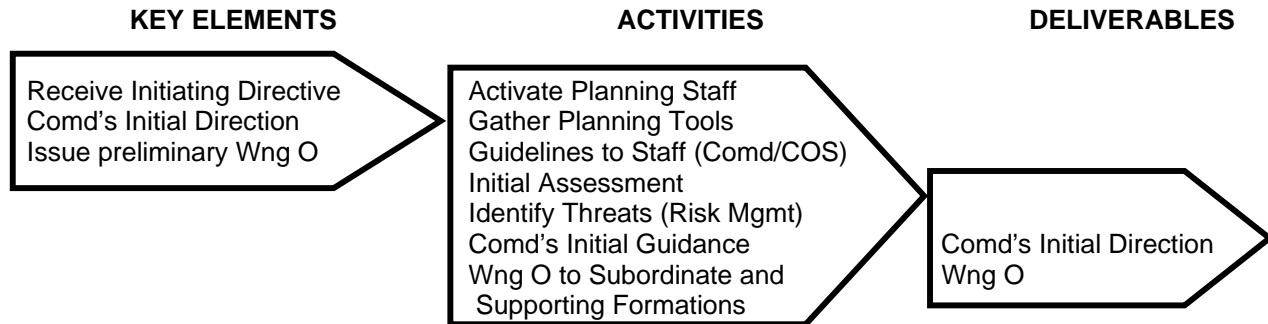


**Figure 4-1 The Rapid Response and Deliberate Planning Process**

## SECTION II - INITIATION

### 402. STAGE 1 - INITIATION

1. Operations planning may be initiated at varying levels in response to either political or military events. In the case of plans or orders developed at the strategic level, the CDS will receive political direction from the Government. For plans and orders developed at subordinate levels of command, the Initiating Authority will be the next superior level commander. However, the operational level commanders, for CONPLANs, may initiate prudent military planning linked to the Defence Plan and in accordance with their terms of reference (TOR).



**Figure 4-2 Stage 1 - Initiation**

2. Once the Initiating Directive is received the following activities takes place:
- a. **Activate Planning Staff.** Designate, notify, and activate the planning staff. An important aspect of this activity is the establishment of the necessary staff contacts with higher and/or subordinate formations who will provide input to the planning process.
  - b. **Gather Planning Tools.** The staff prepares for the mission analysis immediately on receipt of an initiating directive/ Wng O by gathering the tools needed to do the mission analysis. These may include among other things:
    - (1) Higher commander's order or plan, with graphics;
    - (2) Maps/charts and electronic geomatic media on the area of operations;
    - (3) SOPs as necessary; and
    - (4) Appropriate publications and documentation.
  - c. **Guidelines to Staff.** Guidelines how to apply the planning process for the particular operation may be issued and could include direction on (not exhaustive):
    - (1) how the Staff is to coordinate their internal efforts;
    - (2) establishing the necessary external higher and subordinate staff contacts; and
    - (3) ensuring that information from supporting and /or subordinate elements is rapidly passed to the planning staff as the situation or circumstances change. Information flow must be a "push" versus "pull" system.
  - d. **Initial Assessment.** Once the initiating directive is received, it is vital that the commander, with his key staff, assesses the timeline for completing the planning process. Operational planning is a time-sensitive process and time, above all factors, will

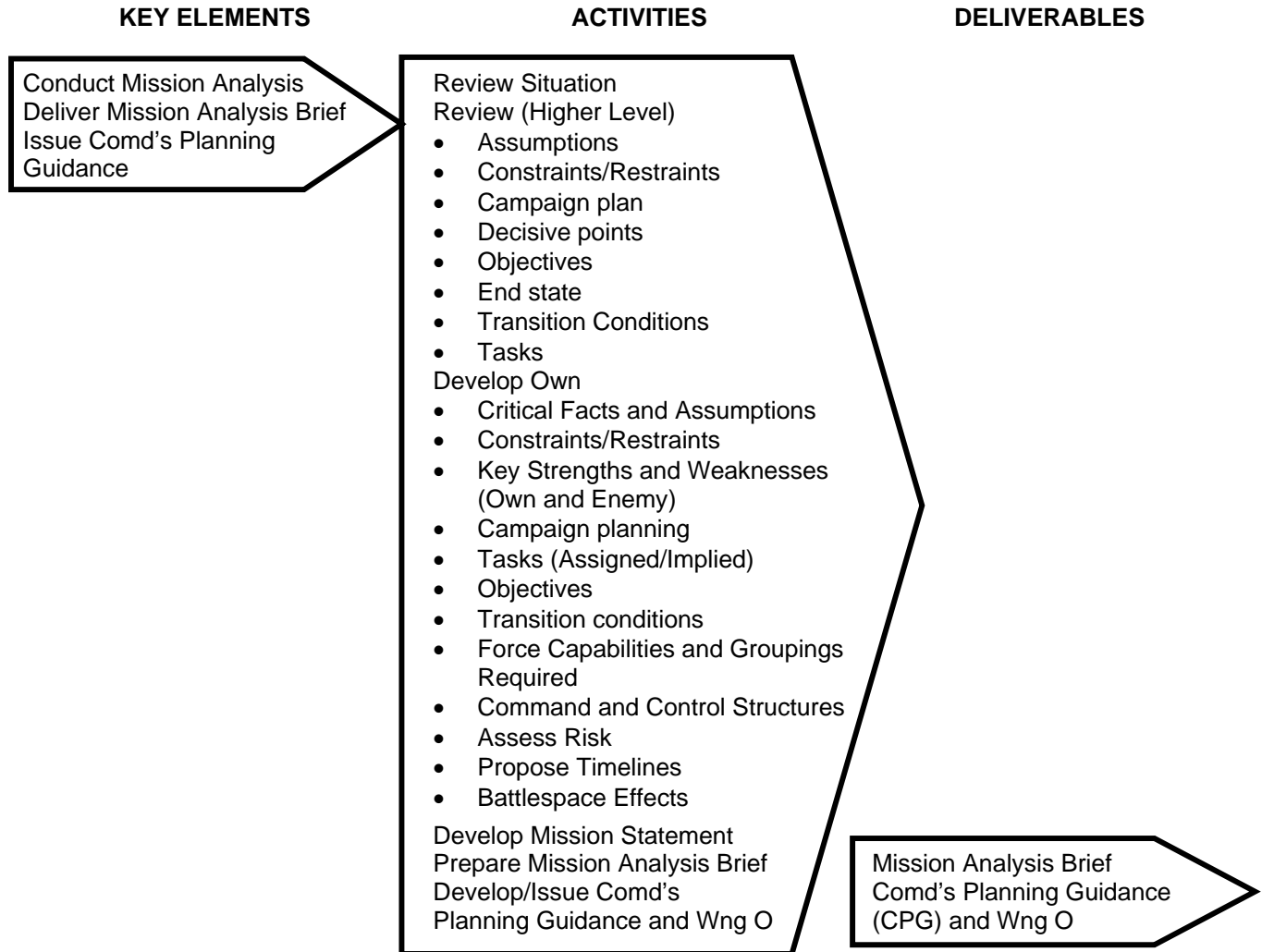
determine the detail of the plan. This assessment will provide an initial allocation of available time to complete the plan. It will require that a balance be struck between the desire for detailed planning and the reality of completing the plan in the time available. Subordinate and supporting formations must be given time to complete their portions of the plan. Depending on the planning environment the commander may abbreviate the OPP.

- e. **Identify Threats.** During the initial assessment of the higher headquarters' order/plan an initial review of the threats that could be encountered is also conducted. This evaluation examines whether there will be appropriate time to prepare for the mission, conditions of the forces available, availability of strategic lift (if required) and other factors.
- f. **Commander's Initial Guidance.** The commander may issue initial direction that could include:
  - (1) how to abbreviate the OPP, if required;
  - (2) initial time allocation;
  - (3) liaison officers to dispatch;
  - (4) initial reconnaissance to begin;
  - (5) authorized movement; and
  - (6) additional tasks the commander requires the staff to accomplish.
- g. **Wng O to Subordinate/Supporting Formations.** In a rapid response action-planning scenario, a preliminary Wng O could be issued at this stage if subordinate and or supporting formations are known.

**SECTION III - ORIENTATION**

**403. STAGE 2 - ORIENTATION**

1. **Introduction.** On receipt of an initiating directive, a commander must orient the staff towards the requirements of the new operation. This is where the commander must place his personal energies to ensure that subsequent activities are focused. However, the commander should be careful not to confine the thinking process of the staff. The key product of the Orientation Stage is the Commander's Planning Guidance.



**Figure 4-3 Stage 2 - Orientation**

2. **Mission Analysis.** The first stage towards the production of the Commander's Planning Guidance is mission analysis. The commander with assistance from the staff is responsible for conducting the overall mission analysis. Mission analysis is cognitive and can be initiated with a brainstorming exercise between the commander and key staff. This analysis has two objectives: it determines the nature of the problem, and confirms the results to be achieved. The mission analysis may indicate that the mission cannot be achieved by a single military action and a campaign plan will be produced. The following paragraphs describe activities conducted during the mission analysis.

3. **Review of Situation.** This stage is used to identify the boundaries of the problem. It is a first look at environmental, political, and geographic factors. In addition, a review of enemy and friendly forces, administrative, logistic and command and control factors may be undertaken. Much of this information will be deduced from the Joint Intelligence Preparation of the Battlespace (JIPB) (See B-GJ-005-200/FP-000 - Joint Intelligence Manual for details).
4. **Review Higher Level Direction.** The commander and his staff thoroughly analyze the higher commander's order to ensure they completely understand: assumptions, constraints and restraints, objectives, end state, criteria for success, and tasks.
5. The commander has specific responsibilities in this stage to designate the end state and the criteria for success for the staff. In this analysis process the following factors must be considered:
  - a. **Critical Facts and Assumptions.** The staff gathers two categories of information concerning assigned tasks — facts and assumptions. Facts are statements of known data concerning the situation, including enemy and friendly dispositions, available forces, unit strengths, and material readiness. *Assumptions are suppositions about the current or future situation that are assumed to be true in the absence of facts.* They take the place of necessary, but unavailable, facts and fill the gaps in what the commander and staff knows about a situation. An assumption is appropriate if it meets the tests of validity and necessity. Validity means the assumption is likely to be true. The initiating directive will likely include a list of assumptions that have been made by the issuing (higher) commander. If the validity of these assumptions changes, the higher headquarters will advise its subordinate HQs.
  - b. **Constraints/Restraints.** A higher commander normally places some constraints on his subordinate commanders that restrict their freedom of action. Constraints take the form of a requirement to do something (for example, maintain a reserve of one division, maintain a fighter squadron on alert, conduct maritime interdiction operations in a specific area). Restraints are prohibitions on action (for example, no reconnaissance forward of a line before H-hour).
  - c. **Key Strengths and Weaknesses (Own and Enemy).** Strengths are those qualities that are particularly effective against a given opposing force in a given situation. Weaknesses are vulnerabilities, which could be attacked to help defeat a force or nation. This determination can take the form of a simple centre of gravity analysis, a more detailed Strange Analysis, portions of a Systemic Operational Design or an Effects Based Approach.
  - d. **Tasks (Assigned/Implied).** Specified tasks are those specifically assigned by a higher headquarters. Implied tasks are those that must be performed to accomplish a specified task or the overall mission, but which are not explicitly stated in the higher headquarters' order. Implied tasks are derived from a detailed analysis of the higher headquarters' order, the enemy situation and courses of action, and the terrain. Only those implied tasks that require allocation of resources should be retained. After analysing specified and implied tasks, they present to the commander for his approval a tentative list of tasks that *must* be executed to accomplish the mission. These tasks are the *essential tasks*.
  - e. **Objectives.** The clearly defined, decisive and attainable goal toward which every operation is directed.
  - f. **End State.** The set of conditions that describe the achievement of policy goals.
  - g. **Transition Conditions.** At the strategic level, transition conditions define the expansion, conversion, reduction or exit of Canadian Forces from a national or multinational operation. At the operational and tactical level, transition conditions define the set of

desired conditions at the conclusion of a campaign, an operation, or their stages or phases.

- h. **Force Capabilities and Groupings.** The commander and staff examine additions to and deletions from the current task organization, support relationships, and status (current capabilities and limitations) of all component units. They consider the relationship between specified and implied tasks and available assets. From this they determine if they have the assets to perform all specified and implied tasks. If there are shortages, they identify additional resources needed for mission success.
- i. **Command and Control Structure Required.** As with force capabilities, it is advantageous to identify the C2 arrangements early in the CF OPP. At this point, this need not be complicated and deals primarily with authority for the operation, transfer of command authority (TOCA) and emergency C2 arrangements.
- j. **Assess Risk.** The commander and staff identify potential risks based on the staff analysis and make an initial assessment of the risk level (extremely high, high, medium and low) for each risk. The commander also makes an initial assessment of where he might accept greater risk in executing his mission. The commander alone must decide on the level of acceptable risk that he is willing to take to succeed. If a commander assesses that the potential risk is too great they direct the development of additional controls or they modify, change, or reject the mission.
- k. **Proposed Timeline.** The commander and staff refine their initial plan for the use of available time. They compare the time needed to accomplish essential tasks to the higher commander's time line to ensure that the plan is completed in the allotted time.

6. **Develop Mission Statement.** A draft Mission Statement for the operation is prepared based on the mission analysis. The Mission Statement must achieve the end state and answer these questions related to the operation:

- a. Who (what types of forces) will execute the action?
- b. What type of action (for example, attack, defend) is contemplated?
- c. When will the action begin?
- d. Where will the action occur (area of operations and objectives)?
- e. Why (for what purpose) will each force conduct its part of the operation?

7. **Prepare Mission Analysis Brief.** The mission analysis briefing (Annex C to Chapter 5) is given to both the commander and the staff. This helps the commander and the staff develop a shared vision of the nature of the mission and the results to be achieved. At the discretion of the commander, the mission analysis briefing may be part of a planning conference for subordinate and supporting commanders. The mission analysis briefing summarizes the directives, decisions, initial concerns, and describes the mission perceived by the commander. Its purpose is to integrate the mission analysis and to solicit any additional guidance from the commander. From this briefing, the mission statement is finalized and the Commander's Planning Guidance is prepared to reflect the commander's approval of the direction taken.

8. **Develop/Issue the Commander's Planning Guidance.** The Commander's approval of the Mission Analysis forms the basis of the final outcome of the Orientation Stage — The Commander's Planning Guidance. It is a formal written document that is the product of the briefing amplified by additional direction provided by the Commander. The guidance provides updated direction and should also enable subordinate or supporting commanders to begin their preliminary preparations. It also serves to inform the higher headquarters of the commander's guidance, and thus allows them to indicate concurrence. In general terms, planning guidance should include:

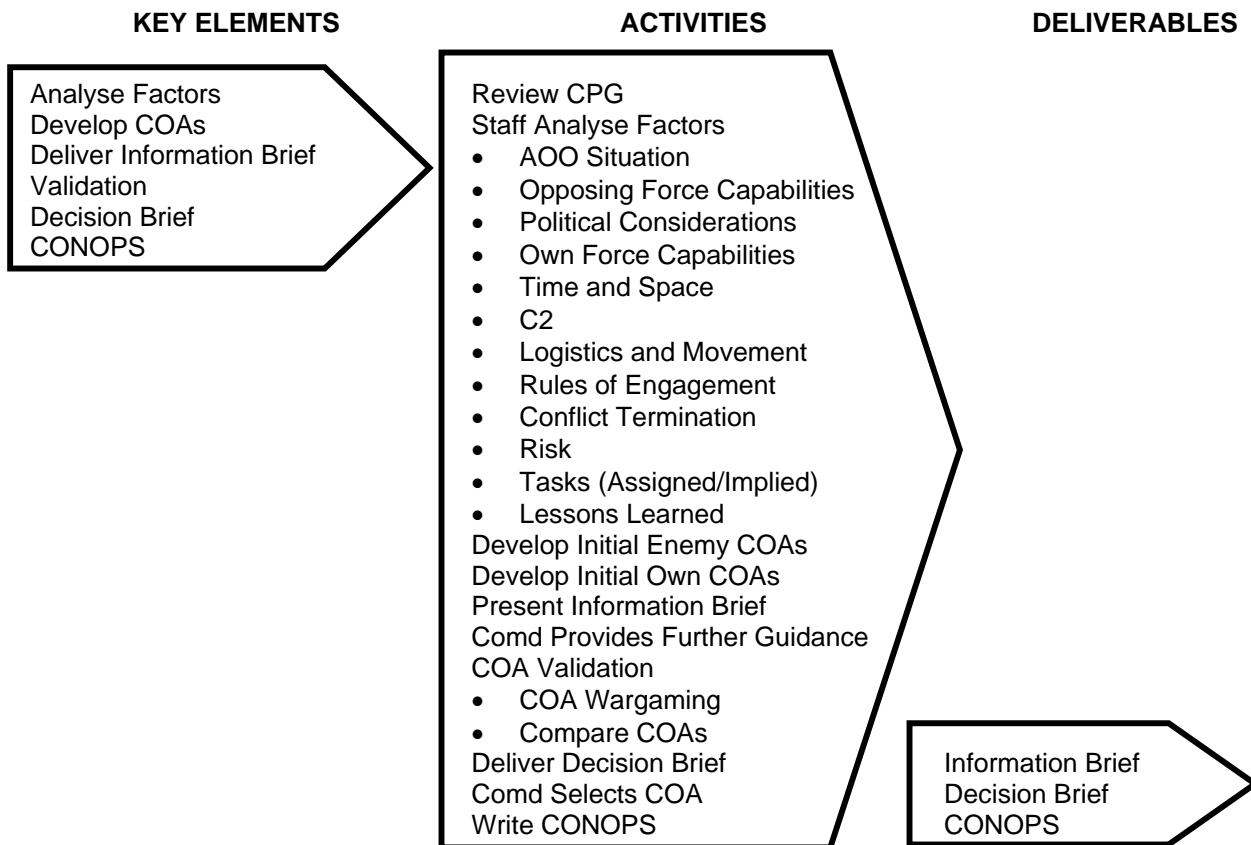


- a. the commander's mission analysis;
- b. the commander's mission statement and intent;
- c. confirmation of the Area of Operations, Area of Influence and Area of Interest;
- d. the commander's critical information requirements;
- e. direction on COA development;
- f. latest date/time for issuing the OP O; and
- g. other information as required (such as the strategic command and control relationship).

**SECTION IV – COURSES OF ACTION DEVELOPMENT**

**404. STAGE 3 - COURSES OF ACTION DEVELOPMENT**

1. **Introduction.** COA development begins with a review of the commander's Planning Guidance, produced in the previous stage. This provides the necessary direction and guidance to the planning staff to continue the estimate process and shape the development of the initial COAs. A COA is a possible option open to the commander that would accomplish the mission. It is initially stated in broad terms, with further details determined during the actual COA analysis. Additionally, it provides a framework for the necessary staff analysis that must consider all factors and deductions to determine the viability of the various options. Planners produce a comprehensive range of initial COAs, which achieve the mission. The commander may be briefed or intervene periodically to provide further direction and focus to the planning staff by eliminating some options and narrowing others. The final stage of this planning stage is the selection by the Commander of a COA followed by the preparation and issue by the staff of the Commander's CONOPS.



**Figure 4-4 Stage 3 - Course of Action Development**

2. **Review Commander's Planning Guidance.** Although the staff have been intimately involved in the development of the CPG, it is nonetheless important to ensure a common understanding of the Commander's intent as articulated in this document. This is particularly critical for subordinate and supporting formations.

3. **Staff Analysis.** Staff analysis identifies the factors and the derived deductions that are relevant to the operation being planned. As well, this activity will provide the vital answer to the question as to whether the mission is achievable based on the limitations imposed by higher authorities. The staff

analysis is a challenging activity; it requires the planning staff to derive logical deductions from each of the factors being considered. Asking the question “So what?” is a valid method and time tested way of drawing the necessary conclusions from the analysis. Deductions, of course, must be relevant to the accomplishment of the mission derived from the Orientation Stage and must contribute to the development of COAs open to the enemy or own forces. Exclude irrelevant deductions. The staff analysis is an iterative process. It may be necessary to consider other factors, and to revise deductions as the analysis continues and potentially affects earlier conclusions. The following factors (not an exhaustive list) need to be examined.

- a. **Area of Operations (AOO).** Any analysis must begin with an appreciation of the AOO. At the operational level this factor involves a broad view of not only such physical elements as the topography, oceanography and meteorology, but issues related to the political, diplomatic, alliance/coalition, economic, cultural, religious and host nation(s) situation in the region.
- b. **Opposing Forces Capabilities.** A thorough analysis of the opposing force is fundamental in the development of COAs. All sources of information must be exploited to gain information on the potential threat that own forces could face if and when the mission is executed.
- c. **Political Considerations.** The ultimate authority to execute a plan resides with the political authorities. The Initiating Direction is expected to identify concisely the political requirements of the potential military option. The nature of the political process will usually mean that certain assumptions will have to be made at the strategic level in the early stages of the strategic planning process, when the CDS initiating directive is being prepared. Also, due to the nature of military operations today, it is imperative that commanders at all levels be aware of the changing political climate through which they have received the authority to execute their plan.
- d. **Own Forces Capabilities.** Typically, higher authorities will have placed a ceiling on the numbers and types of forces that could be expected for the operation. This of course must be fully appreciated since the course of action open will be constrained by this fact. As well, if the operation is to be executed in an alliance or coalition context (which is most likely) then issues related to language, C2, doctrinal compatibility, force capacities and capabilities and weapon systems integration take on added significance. These aspects of ones own forces must be considered as to their impact on COA development.
- e. **Time and Space.** Define the limitations or opportunities that time and space may impose on the achievement of the stated objectives. The topography of the AOO and any special features need to be considered as to their affect on the movement and sustainment of forces. Related to space is time. Analyse the impact of timelines that have been imposed on the operation by higher authorities or by circumstances dictated by other factors, such as weather, diplomatic/political initiatives, own or opposing force readiness and disposition, and others. The concepts of manoeuvre, tempo, synchronization, culminating points and operational pauses are related elements that need to be carefully examined (from the perspective of both sides) so as to anticipate their affects on the mission and on the selection of the best COA.
- f. **Command and Control.** C2 arrangements are a critical aspect of any COA. The analysis of command and control arrangements considers the requirements of superior as well as subordinate and supporting formations. In an alliance/coalition context the analysis of these relationships takes on added importance.
- g. **Logistics and Movement.** This factor will have a significant impact on the identification of COAs that are feasible and ultimately on the best COA. The force’s capability to prepare for an operation, deploy to the theatre (in either a benign or hostile environment) and the ability to sustain the operation are key factors in deciding on the best COA.

- h. **Rules of Engagement.** A thorough analysis of the implications of ROE on an operation is a vital aspect of developing feasible COAs that meet the stated mission.
  - i. **Conflict Termination.** This term is generally used to define those specific conditions, which when met, will lead to a cessation of conflict activities. These conditions are represented by the strategic objectives (both military and political) which have been identified as the desired end state. It is also generally accepted that conflict termination implies those “post-hostilities” activities that preserve and reinforce the political and military objectives achieved. Consequently, the staff analysis must consider the desired or expected nature of the post-conflict “landscape” in physical terms as well as in terms of the political, diplomatic, and economic environment of the AOO. This analysis will have a very significant impact on the COAs that are open to the Commander.
  - j. **Risk.** Of course any consideration of COAs needs to be based on a thorough understanding of the level of risk that is acceptable and/or inherent in carrying out the operation. Risk needs to be analyzed in terms of:
    - (1) the mission itself (benign environment or not, forward presence versus risk of provocation);
    - (2) force protection requirements (for example risk of casualties, fratricide, terrorism and risk to own CoG);
    - (3) the level of risk that the commander is willing to accept; and
    - (4) the risks determined by the staff in analyzing their own areas of responsibility.
  - k. **Assigned/Implied Tasks.** These tasks are derived as previously outlined. Analysis of tasks will result in deductions that will impact on the timing of the operation, force preparation requirements, the types and size of forces that will be required to carry out the operation, the phasing of the operation, command and control relationships and other mission related issues. Also identified are potential specific force requirements, deficiencies or surpluses related to the tasks to be performed.
4. **Develop Enemy Forces Courses of Action.** Enemy courses should be developed first, regardless of which side has the initiative. The staff synthesizes all the accumulated intelligence that is available to derive COAs that are realistically open to the opposing force. A clear understanding is required of what the enemy’s objectives are in the AOO, their capabilities, and their method of operation (doctrine or lack thereof, experience and culture). Once these courses have been defined, determine the advantages and disadvantages to the enemy for each course to deduce the most likely and most dangerous enemy course(s). This analysis will in turn set the stage for the determination of own COAs.
5. **Develop Own Forces Courses of Action.** A recommended approach to COA development is presented below. From this process and these considerations, advantages and disadvantages relative to the accomplishment of the aim and the degree of risk involved can be assessed.
- a. Begin by developing ways to accomplish the tasks associated with the mission. The staff may want to think two levels down (how would subordinate and component formations accomplish the task);
  - b. Then integrate and synchronize these ideas in terms of the operational level concepts and operational functions (end state, sequencing, tempo, Command, Sense, Act, Shield, Sustain);
  - c. Ensure a focus on end states (own and enemy) is maintained and on the Decisive Points that may lead to those end states;

- d. Broadly scope out the possible phases of the COA and initial sequencing of forces including main and supporting efforts;
  - e. Identify broad Component Level missions/tasks;
  - f. Clearly describe the COA in a statement supported by sketches as required;
  - g. Test the viability of each COA by assessing suitability (does it meet the mission, Commanders intent, accomplish tasks), feasibility (force structure and resources to mount and sustain), acceptability (does it account for limitations placed on the operation, is it worth the risk, ROE requirements, does it counter enemy COAs) exclusivity (is it fundamentally different from other proposed COAs) and completeness;
  - h. Determine preliminary command and organizational relationships; and
  - i. As a final check, own courses should be revisited as to how they counter the expected enemy COA, against the deductions and conclusions drawn earlier in the process, and against the principles of war, which have been decided on as benchmarks for the operation. The superior commander's intent may have emphasized certain aspects of the operation that will be an important measure of the merits of a particular course of action.
6. **Present Information Brief.** The Commander is formally advised of the COAs, both enemy and friendly, that are under consideration by the staff in the Information Brief. Courses presented should not be so narrow as to create an unmanageable number of options, nor so broad as to have no distinguishable features worthy of analysis.
7. **Commander/COS Provide Further Direction.** The commander will consider the information and provide direction on further COA development.
8. **COA Validation.** Following the Information Brief, the planning staff undertakes further development of COAs selected by the Commander or COS. This effort includes:
- a. The consideration of additional planning guidance issued by the Commander during the Information Brief;
  - b. The refinement of the COAs selected by the Commander for development;
  - c. The development of new COAs directed by the Commander; and
  - d. The continuation of staff checks and analyses to support the attainment of friendly COAs.
9. **Wargaming.** A method of comparing COAs is Wargaming. Wargaming can be done manually or, if time permits and the resources are available, can be computer assisted using a computer simulation model.
10. **Compare COAs.** The staff is now ready to prepare a graphic representation that shows the Commander clearly and objectively the comparison of the selected COAs. A technique to present this information for the Commander's consideration is the Decision Matrix.
11. **Deliver Decision Brief.** This is a formal briefing that is orchestrated by the COS. It needs to follow a logical sequence so that the staff's choice for the best COA is clearly articulated (see Annex D Chapter 5 for format). The briefing serves three purposes in the planning process:
- a. To present impartially each of the COAs selected for development, and provide a detailed comparison;

- b. To inform the commander, appropriate subordinate commanders and staff of the thrust of planning and potential issues; and
- c. To allow staff elements and liaison officers the opportunity to offer direct advice to the commander in their areas of expertise with respect to the COAs.

12. **Commander Selects COA.** The Commander selects the preferred COA. The staff in turn will translate this COA into a Concept of Operations (CONOPS). If the Commander is not satisfied with the comparison or with the validity of the assessment, or other considerations have emerged which the Commander deems important, the staff may be directed to conduct further COA analysis.

13. **CONOPS.** The final event of this Stage is the preparation and issue by the staff of the Commander's CONOPS. This is always a formal written product, which at the discretion of the Commander, can be briefed to the appropriate authorities. A CONOPS can be described as a clear and concise statement of the line of action chosen by a Commander in order to accomplish his mission. In general the CONOPS accomplishes the following:

- a. Expresses the Commander's methodology and rationale to attain specific objectives;
- b. Advises the Initiating Authority of the Commander's intentions and provides an instrument for him to concur and, if necessary, to obtain political approval; and
- c. Informs subordinate commanders, headquarters' staff and supporting formations of the scope, nature and likely tasking required for their plans.

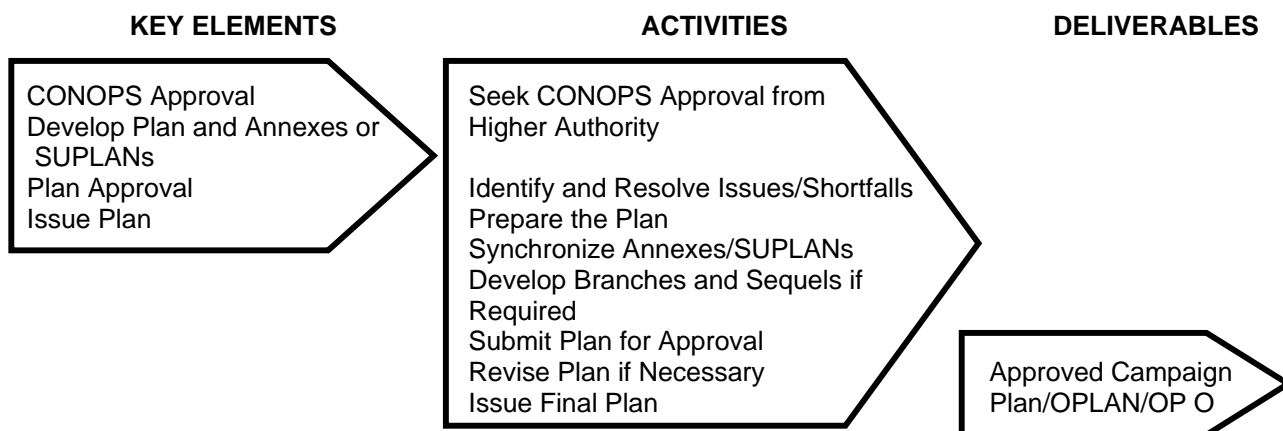
14. The CONOPS will be submitted to the Initiating Authority for approval. CONOPS approval by the Initiating Authority is normally a prerequisite for the full development of a plan or OP O.

## SECTION V – PLAN DEVELOPMENT

### 405. STAGE 4 - PLAN DEVELOPMENT

1. An approved plan or OP O will be the final product of the planning process. The following key events are included in this stage of the process:

- a. develop / coordinate the production of the plan, including attachments;
- b. seek approval from higher authority; and
- c. issue the plan or OP O.



**Figure 4-5 Stage 4 - Plan Development**

2. **Seek CONOPS Approval from Higher Authority.** Before proceeding with the effort of fully developing the detailed plan, the Commander seeks out and gains the approval of higher authority for the CONOPS.

3. **Identify and Resolve Issues/Shortfalls.** The development of the plan is to be based on the approved CONOPS. At this point in the process the planning staff will have a very clear picture of the issues and shortfalls, which could impede the execution of the mission as the Commander envisions in the CONOPS. The resolution of these issues and shortfalls will affect how the plan is developed from the CONOPS.

4. **Prepare the Plan.** The information required to prepare the plan should now be available to the staff. It is a matter of consolidating, collating and manipulating that information into a complete, coherent and clear expression of the plan.

5. **Synchronize Annexes and/or SUPLANs.** Annexes and/or Supporting Plans (SUPLANs) are integral parts of the plan. An Annex is used to provide details concerning a specific aspect of the plan. The use of Annexes keeps the size of the body of the plan manageable, and allows selected addressees to receive copies of only those Annexes that are of direct interest to them. SUPLANs are used when the amount of detail required is too great for the use of an Annex. SUPLANs are stand-alone plans that support another plan by providing detailed direction and information on a particular aspect of that plan.

6. **Develop Branches and Sequels if Required.** The requirement for Branch and Sequel plans will depend on the operational situation. Branches and Sequels may, in turn, result in the amendment or adaptation of the primary plan.

- a. A Branch Plan is a contingency option built into the basic plan for changing the disposition, orientation or direction of movement and for accepting or declining battle. They give the Commander flexibility by anticipating enemy reactions that could alter the plan. The requirement for a Branch Plan would normally manifest itself during the COA Development stage, particularly during Wargaming. The staff may assess that an option is available to the enemy that is not necessarily included in the most likely or most dangerous enemy COA that is being used as the basis of wargaming. In this case it would be prudent to develop a Branch Plan to deal with this potential contingency. This plan, probably not as detailed or well-developed as the main plan that it complements, most importantly needs to identify the additional resources and forces that would be required; and
  - b. Sequels are subsequent operations that flow from the successful execution of the current operation. Sequels ensure that the planning process continuously looks ahead to deal with the next operation. For example a Commander whose mission was to regain territory or to rout an enemy from a particular JOA must look ahead to transitioning from conflict termination to a stabilization operation. A Sequel is the vehicle for planning this operation.
7. **Submit Plan for Approval.** The plan is submitted to initiating authorities for authorisation as necessary.
8. **Issue the Approved Plan.** The approved plan (as a Campaign Plan, OPLAN, CONPLAN, OP O) will be issued to those formations and staffs that will be responsible for its execution. A plan can only be initiated following the order of the higher authority and this will be done with an Implementation Order (Impl O) or an OP O.



## SECTION VI – PLAN REVIEW

### 406. STAGE 5 - PLAN REVIEW

1. A Plan/OP O must be reviewed regularly to evaluate its viability. The evaluation may be conducted through exercises, war gaming or techniques such as logistics flow modelling. In terms of time and quantifiable results, the most effective method may be computer-based war games. However, an independent staff analysis (that is, by officers not directly involved in plan preparation) is also an effective evaluation method. The choice of review methodology will be dictated by time and the availability of resources. If major changes are required and time permits, the planning process should be recommenced from the Orientation Stage. Plan Review has two major applications: Progress Review and a Periodic Review.

- a. **Progress Review.** In the planning, preparation and execution phases, orders must be continually reviewed. This is essential to ensure that required changes can be incorporated to ensure the mission continues to be achievable. Wng Os are updated by issuing supplementary Wng Os and the OP O is changed by issuing Frag Os.
- b. **Periodic Review.** All plans have a limited period of validity due to the changing circumstances upon which they were based. Plans and associated SUPLANs must be reviewed at least every 24 months.

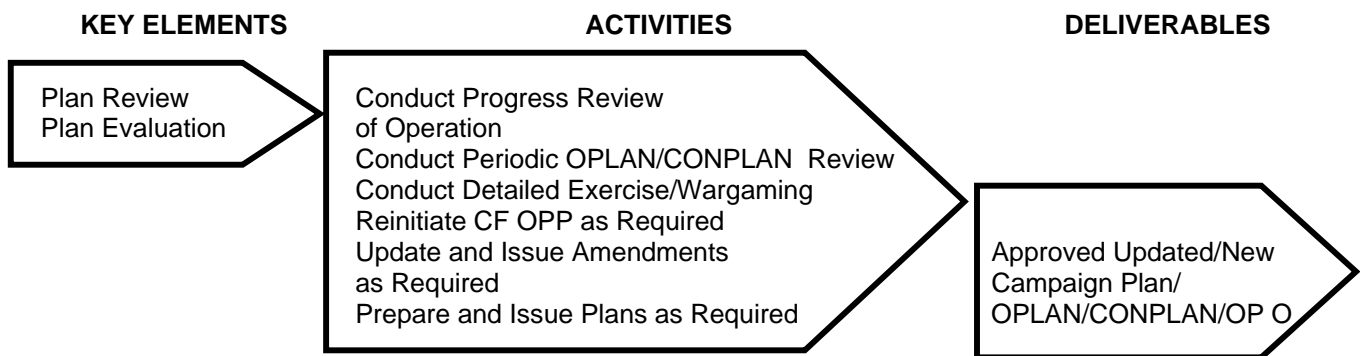


Figure 4-6 Stage 5 - Plan Review

2. **Conduct Progress Review of an Operation.** Progress reviews are conducted when the plan is being executed. For example, during an operation, the plan must be reviewed continually by comparing its validity in the current situation. The staff should ask the question *“has the situation or the assumptions changed?”* to confirm the relevance of the plan, and to identify whether update action is required. This essential process ensures that required changes or Branch plans can be incorporated in time to achieve the mission, especially in response to new threats that were not considered in the original plan. During an operation, significant changes in the situation may trigger the review of a plan, or the review may be directed by higher authority. Once the review is complete, recommendations are presented to the commander to deal with the changed situation.

3. **Conduct Periodic CONPLAN Review.** Periodic staff reviews will help to ensure that a contingency operations plan remains valid, since they all have a limited period of validity. Plan obsolescence usually occurs through changes in the circumstances upon which the plans were based.

4. **Conduct Detailed Exercise/Wargaming.** Rehearsing the plan is a very effective method of gaining detailed knowledge on its effectiveness to achieve the desired results. Of course this is extremely costly in terms of people, resources and equipment. Alternatively, manual or computer based wargaming offers a cost-effective alternative. A “low tech” method that could provide useful feedback is to have the

plan objectively reviewed and evaluated by independent, experienced staff officers, who were not directly involved in the preparation of the plan.

5. **Reinitiate OPP as Required.** If major changes are identified, and time permits, the planning process should be recommenced from the Orientation stage. This will result in a review of all applicable factors to derive appropriate recommendations for changes. These recommendations should once again be presented to the Commander at a Decision briefing. If time is limited, the review of the planning process may be abbreviated and confined to an assessment of the new situation, the definition of its potential effects on the current plan and recommendations for required changes. All planners must be proactive to anticipate the requirements to achieve success in the next task. Planning does not stop when the plan is written and issued. The planning process never terminates until the selected and approved strategic and operational objectives have been accomplished, and the deployed forces have returned to their home stations.

6. **Update and Issue Amendments to Plans as Required.** If only minor changes or amendments to plans are required as a result of the review process, the approval of the higher authority need not necessarily be sought. These changes can be issued directly to formations and staffs who have responsibility for the plan. The Commander will determine the need to seek approval for these types of changes.

7. **Prepare and Issue Plans as Required.** If planning is re-initiated a revised plan that supersedes the existing one will be prepared and issued. The review cycle would then begin anew.

## ANNEX A - RAPID RESPONSE OPTIONS

STAGES	NORMAL PLANNING TASKS	ADJUSTED OUTPUT
<b>INITIATION</b>	Activate Operations Planning Group Gather Planning tools Get organized	
<b>ORIENTATION</b>	Review the Situation (Opposing forces, Admin, Logistics, C2, etc) Review Higher commander's Intent, Desired End- States, Restraints and Constraints Identify the Criteria for Success Identify the Assumptions Assess overall military capabilities of the parties involved Identify the Objectives Identify the Tasks (Assigned and Implied) Develop the Mission Prepare and present the Mission Analysis Briefing Develop and issue the commander's Planning Guidance/Wng O	Mission analysis may be abbreviated by limiting the detail in some of these steps.
<b>COA DEVELOPMENT</b>	Develop and refine COAs Analyse Factors/Make Deductions (Theatre situation, Opposing Forces, military capabilities Time and Space, Assessment of Tasks, C2, Log, Mov and Engr) Develop opposing and own COA Following Info Brief: Compare opposing and own COA Test COA for viability Conduct war gaming Present Decision Brief to the commander	The commander selects only one COA to be analysed and war gamed. COA confirmed based on balance of risks and constraints.
<b>PLAN DEVELOPMENT</b>	Identify and resolve shortfalls Prepare Plan / Op O Develop and synchronize Annexes or SUPs Seek Approval Revise plan as necessary Issue Final Plan / Op O	Plan/OP O based as much as possible on existing CONPLANS and SOPs
<b>PLAN REVIEW</b>	Conduct Progress Review Conduct Periodic Review Conduct exercises and/or war games Conduct Revised Decision Briefing as required Update and issue amendments as required Prepare and Issue plans as required	Updated Plan / Op O

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**CHAPTER 5**  
**STAFF DUTIES**  
**SECTION I - DRAFTING**

**501. WRITING CONVENTIONS**

1. A-AD-121-C01/FP-000 - Staff and Writing Procedures for the Department of National Defence and the Canadian Forces sets out writing conventions for the CF. By design, it does not include formats for operational staff duties. This chapter provides the conventions and formats to be used in CF operations staff work.

2. When drafting plans and orders, staffs shall observe the military writing conventions detailed in STANAG 2014. The formats provided in the annexes to this chapter adhere to the provisions STANAG 2014. The following provisions of STANAG 2014 are particularly important:

- a. the designations of maps;
- b. place names (the convention is to spell these in block capitals);
- c. locations or points on the ground;
- d. directions;
- e. roads, tracks, and railways;
- f. rivers and river banks;
- g. areas;
- h. boundaries; and
- l. numbering of days and hours.

**502. PLANS AND ORDERS**

1. Operations planning is a flexible process, capable in a variety of ways of producing answers to the problems faced by commanders. To communicate the commander's intentions to his assigned forces these answers must be translated into plans and orders. Effective plans and orders are:

- a. **Clear.** Highly technical language should be avoided when there is any danger of misinterpretation. The use of accepted military terminology and phraseology will help to convey identical meanings to everyone concerned. All major tasks of subordinates should be stated precisely, but in a manner to permit each the maximum practical latitude, when possible, in exercising initiative. Only in a case in which concurrent operations require extremely close coordination or timing, should the subordinate be told precisely how to perform the task assigned;
- b. **Concise.** Superfluous words and unnecessary details should be avoided. However, clarity and completeness must not be sacrificed in the interest of brevity alone;
- c. **Complete.** It must contain all of the information and instructions necessary to initiate, coordinate and sustain the execution of the operation; and

- d. **Authoritative.** It must reflect the commander's determination. It must convey, positively, the commander's intentions and will. An indecisive directive may lead to uncertainty and lack of confidence on the part of subordinates.

**503. DESIGNATION OF DAYS AND HOURS**

1. These terms are also used as a reference point for the designation of days/hours before and after the event. The following designations have the meaning shown:

- a. **D-day.** The day on which an operation commences or is due to commence.
- b. **E-day.** The day on which an exercise commences.
- c. **G-day.** The day on which an order, normally national, is given to a deployed unit.
- d. **K-day.** The day on which a convoy system is introduced, or is due to be introduced, on any given convoy lane;
- e. **M-day.** The day on which mobilization commences or is due to commence;
- f. **H-hour.** The specific time at which an operation or exercise commences or is due to commence.

**504. IDENTIFICATION OF PLANS AND ORDERS**

1. Plans and orders prepared at the strategic and operational levels will be identified as follows:

- a. Originator (abbreviated title), that is, CDS/SJS, CANADA COM, CEFCOM, CANSOFCOM, CANOSCOM, etc. (see paragraph 2);
- b. Type, that is, CDS ID, OP O, OPLAN, CONPLAN, SUPPLAN, Campaign Plan, etc;
- c. Identification number, that is, 00300/06 (see paragraph 3);
- d. Nickname (see paragraph 4); and
- e. Descriptive Short Title (see paragraph 5, not required for OP Os).

2. **Originator.** The plan originator indicates the responsible authority issuing the final version of the plan, that is, CDS/SJS, Comd Canada COM, Comd CEFCOM, Comd CANSOFCOM, Comd CANOSCOM, Comd JTFP, etc.

3. **Identification Number.** Plans and orders will be identified using an unclassified five-digit identification number, a slash, and a two-digit suffix to indicate the year the plan or order was approved (e.g. 00800/06):

- a. The first TWO digits identify the originating HQ as follows:

Command/Org HQ	ID	Command/Org HQ	ID
NDHQ/CDS/SJS	00XXX	JTF(N)	17XXX
Reserved* SJS	01 – 09XXX	Reserved* Canada COM	18 - 19XXX
Canada COM	10XXX	CEFCOM	20XXX
JTFA	11XXX	Reserved* CEFCOM	21 – 29XXX
JTFP	12XXX	CANSOFCOM	30XXX
1 Cdn Air Div	13XXX	Reserved* CANSOFCOM	31 – 39XXX
JTFW	14XXX	CANOSCOM	40XXX
JTFC	15XXX	Reserved* CANOSCOM	41 – 49XXX
JTFE	16XXX	Reserved* SJS Control	50 – 99XXX
*Note: Reserved for future use/allocation			

**Table 5-1 Command ID Numbers (FIRST TWO DIGITS)**

- b. The next THREE digits identify the specific category of the operation or plan. The first 50 numbers in each category are reserved for OP Os, OPLANs, and campaign plans, and are numbered sequentially in the order the operation occurs, beginning each calendar year. Perennial operations will retain the same three-digit code throughout the duration of the operation (reserved from year to year). **(A master list of all command/organization ID numbers and three digit operation/plan ID numbers can be found on the SJS Director General Plans website (classified and unclassified).** All correspondence related to a specific operation will use the same three digit ID throughout the duration of the operation (e.g. 802 refers to a specific international operation whilst 202 refers to a specific domestic operation). File and/or originator numbers must also be designated by parent commands/organizations (see paragraph 6). The last 50 numbers in each category are reserved for CONPLANS that are numbered sequentially in the order the CONPLAN is approved. CONPLANS retain the first five digits throughout the life of the document and are not reused. Numbers 400– 409 are reserved to protect NATO numbered plans whilst numbers 300 -399 are reserved to protect CANUS numbered plans;

Category/Subject	ID
Defence of Canada	XX100-XX199
Domestic	XX200-XX299
CANUS	XX300-XX399
NATO	XX400-XX499
Force Generation	XX500-XX599
Not Allocated	XX600-XX699
Peace Support	XX700-XX799
International (Other)	XX800-XX899
Emergency Operations (Internal)	XX900-XX999

**Table 5-2 Operation / Plan ID Numbers (Following THREE DIGITS)**

- c. Plans previously issued will retain their original plan numbers; and
- d. SUPLANs link to the OPLAN or CONPLAN they support by using the same three digits of the operation/plan numeric designation, followed by the letter of the corresponding standard NATO annex (see Annex E, Appendix 1). For example, XXXR is the plan designator for logistic support.
4. **Nicknames.** The originator will allocate to plans, including SUPLANs, a nickname consisting of a single word (usually with the same meaning and close spelling in both French and English). The first letter of the operation nickname will normally correspond with the first letter of the country name. The purpose of the nickname is to provide an unclassified easy reference. Distinct nicknames will be given to subordinate plans. **A master list of all operation and plan nicknames can be found on the SJS Director General Plans website (classified and unclassified).** Nicknames for OP Os are not used when an operation nickname is used. OP nicknames may adopt the plan nickname when executed by an implementation order. However, an OP O prepared using a CONPLAN as the basis for planning will adopt a unique OP nickname separate from the CONPLAN nickname.
5. **Descriptive Short Title.** Plans shall also have a descriptive title indicating the subject of the plan. The title should be short, but provide enough information to describe the general nature of the plan. The descriptive title should be unclassified; where this is impractical, there must be a second, more general and unclassified title. Descriptive short titles are not normally used for OP Os.

Originator	Type of Plan	Numeric Designation	Nickname	Descriptive Short Title
CANADA COM	CONPLAN	10290/02	PANORAMA	CF response to an earthquake in BC
JTFW	CONPLAN	14290/02	PALADIN	JTFW response to an earthquake in BC

**Table 5-3 Format for Identifying Plans – Examples**

6. **File Numbers (internal to each organization, in accordance with the CF file index).** File numbers, when used, will be applied as follows:

- a. **Plans.** 3120-5-(Identification Number Plan). Example: 3120-5-01291/06.
- b. **OP Os.** 3120-7- (Identification Number OP O). Example: 3120-7-02801/06.

## 505. SECURITY

1. **General.** Security is an integral part of the planning process. B-GJ-005-300/FP-000 - *Canadian Forces Operations* covers general security concepts, security measures, and operational security detail. It is essential during the planning process that plans and orders have a security classification that will protect those aspects vital to the success of the operation.

2. **Classification.** The drafter is responsible to determine whether the plan contains information which requires the protection of a classification, and if so, at the level of CONFIDENTIAL (C), SECRET (S) or TOP SECRET (TS) or, in the case of a plan that a NATO agency/agencies will receive, NATO RESTRICTED (NR), NATO CONFIDENTIAL (NC), NATO SECRET (NS) or COSMIC TOP SECRET (CTS).

3. **Over classification.** The most frequent abuse of the system of securing information is over classification. Staffs should assign the lowest possible classification to a plan, consistent with sensitivity and the need-to-know principle.

4. **Warnings.** Where necessary, the drafter may add restrictions such as CANADIAN EYES ONLY or CANADIAN-US EYES ONLY to the security classification.

### 5. Markings.

a. **Pages.** Each page of a plan containing classified information shall be marked conspicuously with the security classification or, if no classified information is included on a particular page, the word UNCLASSIFIED shall appear at the centre top and bottom of the page. The first page or cover shall bear the grading of the most highly classified information in the document. Succeeding pages are marked with the grading of the most sensitive information on that page.

### b. Plan Designations, Subject Headings and Paragraphs

(1) If the overall plan is classified, the descriptive designation, subject headings, and each paragraph shall be given a classification or designated as UNCLASSIFIED.

(2) The designation is indicated by use of the letters U, C, S, and TS, or NATO UNCLASSIFIED (NU), NR, NC, NS, or CTS. The abbreviated indicator is placed after the text of the subject heading, for example:

PLAN FOR EMERGENCY SERVICES (U)

and after the number at the beginning of the paragraph, for example

10. (NS) Text....

(3) The classification of extensive or important sub-paragraphs shall be designated.



c. **Automatic Downgrading and Declassification:**

- (1) Whenever practical, classified plans should include directions for automatic downgrading or declassification. Downgrading instructions appear at the top and bottom of the first page.
- (2) Downgrading or declassification can be related to either an event or a date, for example:

**SECRET**  
**(CONFIDENTIAL after Declaration of MV)**  
**CONFIDENTIAL**  
**(UNCLASSIFIED after 1 April 2012)**

## 506. TERMINOLOGY

1. **General.** In choosing words and terms, writers must apply the overriding requirement for clarity and brevity. Always select short, simple, concise words in preference to complex ones. Jargon is unacceptable.
2. **Normal Vocabulary.** English words and terms shall be used in accordance with their meanings as defined in *The Concise Oxford Dictionary*. Amplification will be taken from *Fowler's Modern English Usage*. French words and terms will be used as defined in *Le Petit Robert*.
3. **Military/Defence Terms.** Military terms with approved definitions should be used wherever possible. If there is any doubt about the meaning that is conveyed with a particular term, a definition should be provided.
4. **New/Unique Terms.** When it cannot be avoided, terms with special meanings may be used. These terms will be identified and defined in Annex Y to the plan entitled "list of references".

## 507. ABBREVIATIONS AND ACRONYMS

1. The abbreviations and acronyms authorized in the Canadian Forces Manual of Abbreviations, A-AD-121-F01/JX-000 and Operational Staff Procedures, Volume 2, Supplement 3- Army Vocabulary, B-GL-303-00-2/JX-Z03 may be used where the writer is confident the reader is familiar with them, for example, NATO, NORAD.
2. Where the repeated use of a full term for which there is no authorized abbreviation would be awkward, an abbreviation or acronym may be introduced. Unauthorized, unexplained abbreviations and acronyms will not be used. The term will be written in full on its first appearance followed by the abbreviation, for example, Regional Directors General Canadian Coast Guard (RDGCCG). Where important parts of a plan may be distributed separately, the explanation shall be repeated on first appearance.

## 508. ORGANIZATION

1. All plans shall be organized as follows:
  - a. cover;
  - b. cover page;
  - c. letter of promulgation;
  - d. record of review and changes;

CFJP 5.0

- e. table of contents;
- f. body of plan;
- g. annexes; and
- h. list of effective pages.

## SECTION II - PLAN APPROVAL AND REVIEW

### 509. PLAN APPROVAL

1. Subordinate commanders' plans will be reviewed and approved by the higher commander before being issued. The purpose of this procedure is to ensure coordination between the plan under consideration and related plans and defence arrangements of the higher HQ. On deployment or during rapid response planning these procedures may be abbreviated.
2. Higher-level review and approval does not replace the procedure in the issuing HQ wherein the final plan is submitted to the commander for approval and signature. Rather, it is the final step in coordinating the plan before it is considered ready for the issuing commander's signature and distribution.
3. The approval procedure is initiated when the subordinate commander submits the completed, unsigned plan to the higher commander with a request for review and approval. The lower commander should personally sign the covering letter indicating that the plan is complete. The senior HQ will complete staff action and respond within 60 days of receipt in peacetime. In an emergency, this staff procedure will be hastened.
4. Results of higher HQ review will indicate that the plan is:
  - a. approved,
  - b. approved subject to certain revisions, or
  - c. not approved because of fundamental or important deficiencies.
5. The formal requirement for plan review and approval established in this chapter does not relieve planners of the more general common-sense requirement for step-by-step coordination. This requirement entails coordination with the staff of senior HQ as the plan develops.

### 510. PLAN REVIEW

1. **General.** Plans will be reviewed to ensure the following:
  - a. that the commitment/mission is still valid;
  - b. that the task organization, coordination and liaison arrangements remain current; and
  - c. that the provisions of the plan continue to be sensible.
2. **Frequency.** CONPLANS and associated SUPLANS shall be reviewed at least every 24 months.
3. **Responsibility.** Review shall be initiated by the staff agency responsible for the preparation of the plan. This agency will call for help in the review from other staff organizations and lower or higher echelons, if required.
4. **Review Results.** The review results shall be categorised as follows:
  - a. **Substantial Change.** When review indicates that substantial change is required, the OPI will undertake these using the same procedures as in the drafting of the plan. A plan change will be developed and:
    - (1) submitted to the higher command for review and approval,
    - (2) approved by the issuing commander, and

(3) distributed under cover of a new letter of promulgation.

- b. **Editorial Change.** When review indicates a need for minor changes, an editorial revision may be prepared. This will be approved by a senior staff officer of the operations staff and distributed under cover of a letter of promulgation. Editorial revisions should not be undertaken unless it is clear that the advantages of revision justify the effort necessary to execute the change in all the HQs, agencies and units concerned.
- c. **Review Completed.** Review will frequently determine that a plan is current and satisfactory. In this case, plan holders will be advised that review has been completed and the plan is current.

## SECTION III - PRODUCTION AND DISTRIBUTION

### 511. PLAN VERSIONS

1. Plans are produced and distributed in accordance with the following guidelines:
  - a. **Draft Versions.** At both the strategic and operational levels, plans are produced and distributed by the senior staff-planning officer in accordance with local regulations using local resources. Changes or amendments to a draft version will normally result in the issue of a successive draft. Typically, draft plans are issued electronically without covers. Publication in both official languages is not required.
  - b. **Advance Versions.** At the strategic and operational levels, plans are produced and distributed by the senior staff-planning officer in accordance with local regulations. Once advance versions are approved and issued, changes or amendments are issued through J5 Plans. These changes or amendments are recorded by the custodian on the page provided within the plan. The use of professional printers and graphic artists, where available, is encouraged, and plans are issued complete with covers. Publication in both official languages is not required.
  - c. **Final Versions.** Normally, plans are only produced in a final version if they include lasting and relatively stable information with anticipated value to a wide audience. If the decision is taken to convert an advance-version plan into a final version, it will be assigned a National Defence Index of Documentation (NDID) number, translated and subsequently distributed through the CF Publications Depot (CFPD). Administrative procedures to be followed are contained in CFAO 57-12, *Publication Management Policy*. Changes to final-version plans are distributed through the CFPD.
2. Because of the limited facilities available to a TFHQ, it is not practical for final-version CONPLANs to be produced in the field.

### 512. DOCUMENT CONTROL AND ACCOUNTABILITY

1. When a plan is produced in final version, an OPI will be assigned. Any demands for the issue, return or destruction of that plan must be made through CFPD and be approved by the OPI.
2. The OPI is responsible for instigating the review process (Article 510).
3. Planning staffs will maintain a register of plans that indicates the plan status, date of review, authority and commander's acknowledgement.

## SECTION IV – FORMATS

### 513. USE OF STANDARD FORMATS

1. The use of standard formats is a proven aid to efficient planning and the subsequent execution of plans. The annexes to this chapter provide samples of standardized formats for plans and planning tools.
2. Canada has adopted NATO Standardization Agreement (STANAG) 2014 dealing with the production of orders and plans. The standard five-paragraph format is mandatory for all OP Os and plans. Staffs may assume that a plan will become an order; thus, to the extent practical, the arrangement of these plans should be identical to orders. Terms such as “no change from”, “see annex”, are permissible following all paragraphs and sub-paragraph headings except paragraph 2, “mission”. Normally, it will be necessary to add additional sub-paragraphs, each of which shall carry a subject heading.

### 514. PLANS

1. **Plans.** Annex E contains a sample plan format. Ideally, the body of the five-paragraph format includes all provisions of a plan; however, at higher command levels, this is normally not practical because of the large amount of data that must be included. In this event, planners should prepare annexes to provide details concerning specific aspects of the plan. Staffs normally should use the allocations listed at the end of the sample plan at Annex E to this chapter to designate annexes. Once the decision to use annexes is made, annexes A through E, are mandatory.
2. **Annexes.** Annexes are integral parts of the plan, but are not authoritative without approval of the overall plan. While approval of the plan constitutes authority to execute the details of an annex, they should not be referred to individually as “orders”. An example of the correct terminology is “Annex L to OP O 0701/99 – Movement”, or the “Movement Annex”. The senior staff-planning officer at the issuing staff agency will sign a covering letter of promulgation for separately published and distributed annexes. In this case, the plan should include a summary of the important provisions of each annex. The use of annexes makes it possible to keep the body of the plan or OP O short and allows selected addressees to receive additional copies of the portions of direct interest to them. Although it is normally best to publish the body and its annexes concurrently, distribution of annexes may occur under separate cover, either before or after distribution of the plan.
3. **Supporting Plans.** SUPLANs should follow the standard five-paragraph arrangement. They are used when the amount of detail required is too great for inclusion in an annex. See annex F for a sample format.

## SECTION V - PROMULGATION / IMPLEMENTATION OF PLANS

### 515. LETTER OF PROMULGATION

1. A letter of promulgation shall be used to cover the distribution of plans and plan changes. Superseded letters will be filed in annex Z of the plan. This letter which should be enclosed for signature when the plan is submitted for approval, includes the following:

- a. the covering letter for plan distribution;
- b. the circumstances of plan approval and its authority;
- c. the plan OPI and OCI(s);
- d. a synopsis of the plan; and
- e. the implementation arrangements.

2. **Ordering Execution.** Paragraph 3 of the letter of promulgation will state the procedures for ordering the execution of plans. A specimen letter of promulgation is at Annex G to this chapter.

### 516. IMPLEMENTATION ORDER

1. The IMPL O (Annex H to this chapter) directs the implementation of a plan by converting it to an "OP O". It should:

- a. describe in general terms the circumstances and procedures for the initiation of operations;
- b. specify increases to readiness of the forces or staff agencies tasked;
- c. specify major activities that will take place either specifically or by reference to the plan;
- d. indicate who is authorized to implement the operation and how to obtain and record authorization;
- e. provide specimen orders or messages for each step in the implementation process; and
- f. provide instructions for the drafting, dispatch and handling of acknowledgment messages.

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**ANNEX A - FORMAT FOR A WNG O**

**WARNING ORDER - OUTLINE FORMAT**

(This is a guide, reproduced from NATO GOP, not a rigid format)

**SECURITY CLASSIFICATION**

(Place the required classification at the top and bottom of every page)

Copy No \_\_\_\_ of \_\_\_\_

Issuing Headquarters

Place of Issue (may be in code)

Date-Time Group of Signature

Message Reference No.

**WARNING ORDER**

**1. Situation**

a. Strategic Objectives

(1) Centre(s) of Gravity (if known)

(2) Desired End state(s), political and military

b. Political and Military Restraints and Constraints

c. Assumptions

**2. Strategic Mission**

**3. Tasks**

a. Other Co-ordination

(1) Timing

(2) Rules of Engagement (ROE)

**4. Logistics and Key Support Aspects**

**5. Command and Control Arrangements**

**ACKNOWLEDGE**

**NAME** (Commander's last name)

**RANK**

**OFFICIAL:** (Authentication)

**WNG O - LETTER FORMAT**

(This is a guide, reproduced from STANAG 2014, not a rigid format)

**SECURITY CLASSIFICATION**

(Place the required classification at the top and bottom of every page)

Change from oral orders, if any)

Copy No \_\_\_\_\_ of \_\_\_\_\_

Issuing Headquarters

Place of Issue (may be in code)

Date-Time Group of Signature

Message Reference No.

**WNG O XX** (number sequentially for each operation), OP (NAME)

References: Maps, charts and relevant documents (see STANAG 2029)

Time Zone Used Throughout the Order (Optional)

1. **Situation.** Short summary of the situation, including, as appropriate:
  - a. Political situation, and enemy forces in the area of operations;
  - b. National/Coalition Strategic Goals and Canadian National Interests;
  - c. Anticipated attitude and actions of friendly nations;
  - d. Type, level, and source of major combat forces available for planning or a request for the commander's assessment of forces and strategic lift requirements;
  - e. Any historical or current information that may assist planners;
  - f. Economic considerations;
  - g. Risk Assessment; and
  - h. Facts / Assumptions that may significantly affect the commander's planning.
2. **Mission.** A concise statement of the mission to be accomplished (including its purpose).
3. **Execution.** A brief statement of the commander's intent: (Optional)
  - a. **Concept of Operations.** Provide as much detail as available, this may be expanded in the subsequent Wng Os. If the commander issuing the Wng O desires that specific phases or COAs be examined, they will be listed here. Otherwise, the tasked commander will develop the COAs as appropriate;
  - b. **Probable Tasks/Missions.** Any information on tasks to TF Comd, CMS, CLS, CAS, etc. These are normally prefaced with "Be prepared to..."; and
  - c. **Coordinating Instructions.** Any information available at the time of the Wng O. It may include the following:
    - (1) Commander's Critical Information Requirements (CCIR);
    - (2) Tentative execution timing for use in operation planning;
      - (a) Orders group meeting (including location and attendees); and
      - (b) Movements (including degree(s) of notice);

- (3) Anticipated date of execution (D-day). May be very tentative, but provides the commander and his staff a relative time frame for operational planning.  
Anticipated duration of operations;
- (4) Constraints, restraints and planning limitations (e.g., overflight restrictions, port clearance requirements, boundaries, movements, recce, etc.);
- (5) End state and transition conditions;
- (6) centre(s) of gravity if known or determined;
- (7) ROE Considerations;
- (8) Supporting Commander coordination or monitoring instructions as required by the TF Comd;
- (9) Authorization for direct liaison between commanders (that is, DIRLAUTH authorized between ... after/NET; and
- (10) Guidance on:
  - (a) Risk;
  - (b) OPSEC and deception;
  - (c) PSYOPS;
  - (d) Intelligence / Counter Intelligence;
  - (e) Engineers;
  - (f) CIMIC;
  - (g) PA; and
  - (h) etc.

4. **Service Support.**

- a. Transportation;
- b. Logistics constraints; and
- c. Administrative arrangements.

5. **Command and Signals.**

- a. Communications guidance;
- b. Command relationships;
- c. CODEWORDS or NICKNAMES for the operation;
- d. Reporting Instructions. Instructions and dates for submission;
- e. Classification and declassification guidance; and
- f. Points of Contact.

**ACKNOWLEDGE**

**NAME** (Commander's last name)

**RANK**

**OFFICIAL:** (Authentication)

**ANNEXES:**

**DISTRIBUTION:**

**WNG O - MESSAGE FORMAT**  
(This is a guide, not a rigid format)

FROM: ISSUING HQ

TO: TF COMD

SUPPORTING COMMANDS AND AGENCIES

INFO: AS REQUIRED

SIC: AS REQUIRED

SECURITY CLASSIFICATION

ORIGINATOR'S NUMBER:

SUBJ: WNG O XX (number sequentially), OP (NAME)

REFS: A. (AS REQUIRED)

1. SITUATION. SHORT SUMMARY OF THE SITUATION, INCLUDING, AS APPROPRIATE:
  - 1.A POLITICAL SITUATION, AND ENEMY FORCES IN THE AREA OF OPERATIONS;
  - 1.B. NATIONAL/COALITION STRATEGIC GOALS AND CANADIAN NATIONAL INTERESTS;
  - 1.C. ANTICIPATED ATTITUDE AND ACTIONS OF FRIENDLY NATIONS;
  - 1.D. TYPE, LEVEL, AND SOURCE OF MAJOR COMBAT FORCES AVAILABLE FOR PLANNING OR A REQUEST FOR THE COMMANDER'S ASSESSMENT OF FORCES AND STRATEGIC LIFT REQUIREMENTS;
  - 1.E. ANY HISTORICAL OR CURRENT INFORMATION THAT MAY ASSIST PLANNERS;
  - 1.F. ECONOMIC CONSIDERATIONS;
  - 1.G. RISK ASSESSMENT; AND
  - 1.H. FACTS / ASSUMPTIONS THAT MAY SIGNIFICANTLY AFFECT THE COMMANDER'S PLANNING.
2. MISSION. A CONCISE STATEMENT OF THE MISSION TO BE ACCOMPLISHED
3. EXECUTION. A BRIEF STATEMENT OF THE COMMANDER'S INTENT: (OPTIONAL)
  - 3.A. CONCEPT OF OPERATIONS. PROVIDE AS MUCH DETAIL AS AVAILABLE, THIS MAY BE EXPANDED IN THE SUBSEQUENT WNG OS. IF THE COMMANDER ISSUING THE WNG O DESIRES THAT SPECIFIC PHASES OR COAS BE EXAMINED, THEY WILL BE LISTED HERE. OTHERWISE, THE TASKED COMMANDER WILL DEVELOP THE COAS AS APPROPRIATE;
  - 3.B. PROBABLE TASKS/MISSIONS. ANY INFORMATION ON TASKS TO TF COMD, CMS, CLS, CAS, ETC. THESE ARE NORMALLY PREFACED WITH "BE PREPARED TO..." ; AND
  - 3.C. COORDINATING INSTRUCTIONS. ANY INFORMATION AVAILABLE AT THE TIME OF THE WNG O. IT MAY INCLUDE THE FOLLOWING:
    - 3.C.1. COMMANDER'S CRITICAL INFORMATION REQUIREMENTS (CCIR);

- 3.C.2. TENTATIVE EXECUTION TIMING FOR USE IN OPERATION PLANNING;
    - 3.C.2.A. ORDERS GROUP MEETING (INCLUDING LOCATION AND ATTENDEES); AND
    - 3.C.2.B. MOVEMENTS (INCLUDING DEGREE(S) OF NOTICE);
  - 3.C.3. ANTICIPATED DATE OF EXECUTION (D-DAY). MAY BE VERY TENTATIVE, BUT PROVIDES THE COMMANDER AND HIS STAFF A RELATIVE TIME FRAME FOR OPERATIONAL PLANNING. ANTICIPATED DURATION OF OPERATIONS;
  - 3.C.4. CONSTRAINTS, RESTRAINTS AND PLANNING LIMITATIONS (E.G., OVERFLIGHT RESTRICTIONS, PORT CLEARANCE REQUIREMENTS, BOUNDARIES, MOVEMENTS, RECCE, ETC.);
  - 3.C.5. END STATE AND TRANSITION CONDITIONS;
  - 3.C.6. CENTRE(S) OF GRAVITY IF KNOWN OR DETERMINED;
  - 3.C.7. ROE CONSIDERATIONS;
  - 3.C.8. SUPPORTING COMMANDER COORDINATION OR MONITORING INSTRUCTIONS AS REQUIRED BY THE TF COMD;
  - 3.C.9. AUTHORIZATION FOR DIRECT LIAISON BETWEEN COMMANDERS (I.E., DIRLAUTH AUTHORIZED BETWEEN ... AFTER/NET; AND
  - 3.C.10. GUIDANCE.
    - 3.C.10.A RISK;
    - 3.C.10.B. OPSEC AND DECEPTION;
    - 3.C.10.C. PSYOPS;
    - 3.C.10.D. INTELLIGENCE / COUNTER INTELLIGENCE;
    - 3.C.10.E. ENGINEERS;
    - 3.C.10.F. CIMIC;
    - 3.C.10.G. PA; AND
    - 3.C.10.H ETC.
4. **SERVICE SUPPORT.**
- 4.A. TRANSPORTATION;
  - 4.B. LOGISTICS CONSTRAINTS; AND
  - 4.C. ADMINISTRATIVE ARRANGEMENTS.
5. **COMMAND AND SIGNALS.**
- 5.A. COMMUNICATIONS GUIDANCE;
  - 5.B. COMMAND RELATIONSHIPS;
  - 5.C. CODEWORDS OR NICKNAMES FOR THE OPERATION;
  - 5.D. REPORTING INSTRUCTIONS. INSTRUCTIONS AND DATES FOR SUBMISSION;
  - 5.E. CLASSIFICATION AND DECLASSIFICATION GUIDANCE; AND
  - 5.F. POINTS OF CONTACT.

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**ANNEX B - FORMAT FOR AN ESTIMATE**

(This is a guide not a rigid format)

**SECURITY CLASSIFICATION**

(Place the required classification at the top and bottom of every page)

Issuing HQ  
 Location  
 Date and Time of Issue

**ESTIMATE FOR (TITLE)****References:**

- A. Appropriate maps, charts and reports
- B. Supporting estimates
- C. Directives and commander's planning guidance

1. **Situation.** A short summary of the situation, as provided / updated by the Initiating Directive/Wng Os.

2. **Mission.** State the mission that was determined in the orientation step 2. It may be necessary to include a subparagraph to detail any limitations to the mission. Include centres of gravity if known or determined.

3. **Assumptions.** Include only those assumptions required to complete the estimate. Assumptions made by the commander are to be considered as facts for planning purposes.

4. **Factors Affecting the Achievement of the Mission:**

- a. Describe the factors, which affect the mission. This can be in either narrative or tabular form. After each factor, list the deductions drawn from the facts. Conclusions should be concise and relevant; ideally, they should be expressed as a building block of information, for example:

(1) Offensive air operations cannot commence before day 12; and

(2) The maximum size force which can be sustained for the period is one mechanized division or one reinforced air mobile division; and

- b. Group the deductions by function to assist the development of COAs. It may be necessary to revise deductions, as later aspects of the estimate affect earlier conclusions.

5. **COAs:**

- a. Describe the COAs open to the opposing force. Ideally, this should be a series of feasible options of varying potential impact on our capacity within the theatre. It is always prudent to identify that COA which has the most serious impact on our capacity, regardless of the likelihood of it occurring. This provides an objective starting point for the array of COAs taken by the opposing force; and

- b. Describe the COAs, which our forces have the operational and logistic capacity to execute. These COAs should only be limited by the guidance provided in the initiating directive/Wng O. The description should include:

(1) CONOPS;

- (2) Probable Tasks / Missions;
- (3) Task Organization;
- (4) Critical Support Requirements (Engineering, Movement, Logistics, Sustainment, Financial); and
- (5) Impact of this COA on other CF Ops, Training, procurement, or OGDs.

6. **Comparison and analysis of COAs.** Compare each of our own COAs against the opposing force's potential. This comparison should be as objective as possible using the deductions derived previously from the estimate. It is appropriate to set this comparison out in tabular form to focus on specific elements, particularly the comparison of time, space and mass. For example:

COA 1 - An amphibious assault preceded by naval and air bombardment. (More text as required.)

Comparison Aspect	Opposing Force COA 1	Opposing COA 2, etc.
1. Time effect	a. Most likely that the opposing force will achieve superior rate of build-up.	a. Opposing force will not be able to develop forces in the theatre until after...
2. Space effect	a. The opposing force's advance will open airstrips for offensive operations over...	a. Port facilities will be available to the enemy along the coast from...
3. Mass effect	a. The opposing force can achieve superior concentrations from day 23 onwards...	a. Sustainment of forces will be severely restricted following the opposing force's enforcement of a naval blockade...
4. Etc.		
Assessment	This COA will have the most significant impact on our COA 1. The implications are...	This COA will have little impact on the execution of our COA 1. In fact it will hasten the collapse of...

7. **Summary of our COAs.**

- a. COA X. In separate paragraphs, describe the strengths and weakness of each COA;
- b. Identify which opposing force COA is believed to be the most likely with respect to their capabilities and suspected intentions; and
- c. Identify the criteria chosen for establishing the relative ranking of the COAs with respect to the most likely opposing COA. (for example, relative combat power, Force protection, ease of execution, sustainment, cost, political acceptability, impact on other commitments, etc). Conclude by identifying the COA, which best meets the mission and caters for the opposing force's capability. This may be done in tabular format and may require the staff to weight the criteria to establish a clear ranking.

8. **Selecting Preferred COA.** A statement of the preferred COA resulting from the above assessment.

9. **Outline Plan.** An outline plan based on the preferred COA(s) is prepared, but only in sufficient detail to enable the staff to undertake the development of the decision brief and CONOPS.

Commander's signature

Annexes/Supporting documents  
Distribution list

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**ANNEX C - FORMAT FOR MISSION ANALYSIS**  
(This is a guide adapted from the NATO GOP)

1. **Introduction**
  - a. Aim of Brief
  - b. Outline
2. **Review of Situation**
  - a. General
    - (1) Political, military and historical background
    - (2) Current Situation
  - b. Opposing Force Situation
    - (1) Intent
    - (2) Capabilities
    - (3) Assessment (brief description of likely actions – not COAs)
  - c. Higher Commander's Direction and Guidance
    - (1) Mission
    - (2) Intent
    - (3) Objectives
    - (4) Transition Conditions
    - (5) Assumptions
    - (6) Limitations
    - (7) Assigned Tasks to Your Command
    - (8) Implied Tasks to Your Command
3. **Operations Design**
  - a. Key Factors and Deductions (only those with impact on mission analysis).
  - b. Planning Assumptions
  - c. Key Strengths and Weaknesses
    - (1) Opposing Force
    - (2) Own Force
    - (3) Relevant Other Forces, as necessary
  - d. Centres of Gravity (if applicable)

- (1) Strategic
  - (2) Operational
- e. Decisive Points (own level)
- f. Objectives
- g. End State and Criteria for Success
- 4. **Proposed Mission**
- 5. **Initial Force Estimate**
  - a. Forces Available for Planning Purposes (if given)
  - b. Estimate of Forces Required
- 6. **Proposed Planning Guidance**
  - a. Proposed Initial Intent
  - b. Direction to Planning Staff (Staff Planning Directive)
  - c. Direction to Subordinate Commands (Wng O)
- 7. **Conclusion**
- 8. **Approvals.** Seek approval of:
  - a. Operations Design
  - b. Mission
  - c. Proposed Planning Guidance
- 9. **Additional Guidance**

**ANNEX D - FORMAT FOR MISSION ANALYSIS, INFORMATION AND DECISION BRIEFING**  
(This is a guide, not a rigid format)

1. **Introduction.** Review of the information provided in the planning guidance - initiating directive/Wng O
  - a. Situation
  - b. Mission
  - c. Execution
2. **Courses of Action.** The details for the remainder of the brief are drawn from the estimate.
  - a. Describe the COAs open to the opposing force. Ideally, this should be a series of feasible options of varying potential impact on our capacity within the theatre. It is always prudent to identify that COA which has the most serious impact on our capacity, regardless of the likelihood of it occurring. This provides an objective starting point for the array of COAs taken by the opposing force.
  - b. Describe the COAs which our forces have the operational and logistic capacity to execute. These COAs should only be limited by the guidance provided in the initiating directive/Wng O. The description should include:
    - (1) CONOPS;
    - (2) Probable Tasks / Missions;
    - (3) Task Organization;
    - (4) Critical Support Requirements (Engineering, Movement, Logistics, Sustainment, Financial, etc;) and
    - (5) Impact of this COA on other CF Ops and Training, procurement, OGDs.
3. Comparison and analysis of COAs.
4. COA Summary and recommendation for preferred COA (may include ROM cost estimates).
5. Commanders Decision or Guidance.

**Note:** Specific content of individual briefs should be outlined in appropriate SOPs.

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**ANNEX E - FORMAT FOR AN OPERATIONAL LEVEL PLAN**  
(Adapted from NATO GOP Aug 00)

SECURITY Classification

(Place the required classification at the top and bottom of every page)

Copy No \_\_\_ of \_\_\_\_\_

Issuing Headquarters

Place of Issue

Date/Time of Authorization

ORIGINATOR – TYPE – NUMBER – NAME – DESCRIPTION

(E.G. CDS CONPLAN 00910/02 RECUPERATION - (insert synopsis of mission statement))

Reference: (Appropriate maps, charts and reports)

1. (XX) **SITUATION.** This is the information the executing commander receives from higher commands on which to base his planning. If any of the sections below are not provided or are not applicable, then they should be omitted.
  - a. **General.** Information on the background to the development of the plan.
  - b. **Strategic Conditions.** Describe the strategic conditions that led to the development of the plan.
  - c. **Scope.** This sub-paragraph should address the scope of the plan, if given from higher headquarters. It should discuss the area of operations.
  - d. **Desired End State.**
  - e. **Strategic Objectives.**
  - f. **Transition Conditions.**
  - g. **Threat Assessment.** Provide an overview of the threat assessment from Intelligence. Detailed Threat Assessment and information about opposing forces will be contained in Annex D, "Intelligence".
  - h. **Centres of Gravity.** Describe the Higher Commander's COGs of the operation and decisive points (if given).
  - i. **Friendly Forces.** Other forces and commands whose listed actions will directly affect the issuing commander's task. If there are special agreements covering co-operation and/or co-ordination, they are to be listed in Annex B, "Task Organization and Command Relationships".
  - j. **Attachments and Detachments.** External forces that may be committed to own command and forces provided by own command to other commands.
  - k. **Limitations.** (if given from higher headquarters)
    - (1) **Constraints.** Describe the factors that limit what may be done.
    - (2) **Restraints.** Describe the specific obligations that must be met.
  - l. **Given Assumptions.** List the political and military assumptions given from higher headquarters.

- (1) **Political Assumptions.**
    - (2) **Military Assumptions.** List the higher commander's Military Assumptions.
  - m. **Key Tasks.** List key military and supporting tasks, if given, from higher commander's guidance.
2. (XX) **MISSION.** A clear, concise statement detailing who will conduct the operation, what is to be done, when it will take place, where it will occur, and why it is being conducted. The order of the elements may vary.
3. (XX) **EXECUTION.**
- a. **Planning Assumptions.** List the additional planning assumptions derived during the mission analysis.
  - b. **Commander's Analysis.** A short summary of the key elements of the mission analysis.
    - (1) **Centres of Gravity.** Identifies the key Centres of Gravity (COGs) and Decisive Points that will influence mission accomplishment.
    - (2) **Constraints and Restraints.** Describes other factors that may influence mission accomplishment.
    - (3) **Risk Assessment.** A brief description of the identified risks and an assessment of their likely influence on successful mission accomplishment.
  - c. **Commander's Intent.** This summary should provide the Commander's overall intent and establish the purpose of the plan. It is an important focusing statement for subordinate commanders.
    - (1) **Military Objectives.**
    - (2) **Desired Military End-State.**
    - (3) **Transition Conditions.**
  - d. **Conduct of Operations.** A short summary of the conduct of operations, detailed in Annex A of the plan, should identify actions, normally in planned phases of accomplishment. The structure of this section may vary depending upon the commander's approach and the type of plan.
  - e. **Tasks.** Allocation of tasks to each immediate subordinate and directly supporting commander with cross-reference, as appropriate, to potential missions or operations covered by other plans (may be included as Annex C vice written here).
  - f. **Forces.** Include a general summary of the major forces involved in the plan, including a list of sending nations, as detailed in the SOR. Detailed force lists are in Annex C of the plan.
  - g. **Coordinating Instructions.** Instructions, where applicable, to commanders of other operations that may be influenced by, or have an influence upon, this operation. Mention of plans that affect, are affected by or are in any other way related to present plan.
- Note 1.** TASK ORGANIZATION. This information may be provided in Paragraph 3 "EXECUTION" or in an Annex, which may be in text or graphical form. List of immediate subordinate commands and directly supporting commands. A brief description of the command organization (composition and relationships) for the campaign. Detailed information, for example, the full

order of battle, would be listed in Annex B, "Task Organization and Command Relationships".

4. (XX) **SERVICE SUPPORT.** Statement of the administrative and logistics arrangements, to support the operation, of primary interest to the units and formations being supported. It may also contain the commander's direction to service commanders. Logistics details may be included in annexes to the plan, including the Logistics Annex, and referenced here.

- a. **Logistics Concept.**
- b. **Logistics Standards and Requirements.**
- c. **Movements.**
- d. **Medical Support.**
- e. **Host Nation Support.**
- f. **Personnel Replacement and Holding Policy.**
- g. **Financial Support Services.**

5. (XX) **COMMAND AND SIGNAL.** Contains the headquarters locations and movements, liaison arrangements, recognition and identification instructions and general rules concerning the use of communications and other electronic equipment, if necessary. The Communications and Information Exchange Annex may be used for detailed instruction when considered appropriate. Include reference to Annex B, "Command Relationships".

- a. **Command and Control.**
- b. **Communications.**

#### ACKNOWLEDGE

Commander's signature

**AUTHENTICATION:** Use only when applicable. If the commander signs the original, no further authentication is required. Otherwise authentication by the preparing staff officer with only the last name and rank of the commander appear in the signature block.

Annexes

- A Conduct of Operations
- B Task Organization and Command Relationships etc

Distribution list

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### APPENDIX 1, ANNEX E - LIST OF ANNEXES AND APPENDICES

1. Plans for operations and exercises will vary in their requirement for annexes and appendices, depending on the type of plan and the operation, which it covers. To allow easy cross-reference, annexes and appendices of all planning documents are to retain the standard lettering assigned below. Where the operation or exercise does not require a topic to be addressed that annex or appendix may be omitted. The lettering of annexes or appendices in a plan may not, therefore, be sequential throughout. Additional required annexes and appendices are to be assigned spare letter/number designators.

2. Standard Annex Format:

	ANNEX	APPENDIX
A.	Conduct of Operations	
B.	Task Organization and Command Relationships	Transfer of Command Authority (TOCA)
C.	Forces, Missions/Tasks	Detailed Force Listings
D.	Intelligence	Threat Assessment Intelligence Architecture Areas of Intelligence Responsibility and Interest Collection, Co-ordination of Intelligence Requirements Management (CCIRM) Target Intelligence Human Intelligence Collection (HUMINT) Imagery Intelligence (IMINT) Battlespace Effects Enemy Situation Enemy Capabilities Enemy COA Security Intelligence Signals Intelligence Open Source Intelligence Geomatic Support
E.	Rules of Engagement	

	<b>ANNEX</b>	<b>APPENDIX</b>
F.	Maritime Operations	Maritime Air Operations Anti-Submarine Operations (ASW) Anti-Air Warfare (AAW) Anti-Surface Warfare (ASUW) Mine Warfare Submarine Operations Naval Control and Protection of Shipping Land Based Air Support of Maritime Operations
G.	Land Operations	Key Points and Rear Area Security Cover and Deception Area Damage Control Battlefield (Tactical) Psychological Activities Aviation Support for Ground Ops
H.	Air Operations	Counter Air Operations Strategic Air Operations Anti Surface Air Operations Supporting Air operations
I.	Amphibious Operations	
J.	Force Protection	
K.	HSS	
L.	Psychological Operations	
M.	Arms Control	
N.	Nuclear Operations	
O.	Information Operations	
P.	Electronic Warfare	
Q.	Communications and Information Systems	
R.	Logistics	Service Support Personnel Services
S.	Movements	

	<b>ANNEX</b>	<b>APPENDIX</b>
T.	Environmental Support	Geographical Meteorological Oceanography
U.	Operations in a NBC Weapons Environment	Nuclear, Biological and Chemical Defence Bases and Facilities
V.	Combat Survival	Evasion and Escape Combat Search and Rescue
W.	Civil-Military Co-operation	
X.	Public Affairs	Public Affairs Organization Media Visits Policy
Y.	Casualty Estimation	
Z.	Conflict Termination and De-escalation (Transition Strategy)	
AA.	Legal	
BB.	Training and Exercises	
CC.	Documentation, Records and Reports	Visual Information and Combat Documentation Reporting System Records
DD.	Space Operations	
EE.	Engineer Support	
FF.	Financial Support	Funding Support Contracting Support Cashier Services Local Labour Host Nation/Mutual Support Arrangements Non-Public Fund Accounting
GG.	Non-NATO Force Procedures	
HH.-XX.	SPARE	
YY.	Miscellaneous	Definitions and Abbreviations Bibliography and References

	<b>ANNEX</b>	<b>APPENDIX</b>
ZZ.	Distribution	



**ANNEX F - FORMAT FOR A SUPPORTING PLAN**

(This is a guide not a rigid format)

**SECURITY CLASSIFICATION**

(Place the required classification at the top and bottom of every page)

File No

Copy No \_\_\_\_\_ of \_\_\_\_\_

Issuing Headquarters

Place of Issue

Date/Time of Authorization

**ORIGINATOR - SUPPORTING PLAN – IDENTIFICATION NUMBER – NAME - DESCRIPTION**

(E.G. CDS SUPLAN 00910R/02 BANYAN – LOGISTICS SUPPORT TO CONPLAN RECUPERATION)

**Reference:** Appropriate maps, charts, and reports

1. **Situation.** A general statement of the factors affecting the support of the operation. Must include a description of the overall mission, outline CONOPS and, if relevant, the task organization.
2. **Mission.** A concise statement of the mission of the supporting organization.
3. **Execution.** Contains an outline of how the mission is to be carried out by units and formations alone or in conjunction with OGDs or HNS.
  - a. **Concept of Operations.** This is a statement of the broad concept for the support of the TF mission.
  - b. **Tasks.** Provide details of tasks to subordinate formations / units;
  - c. **Coordinating Instructions.** Describe the arrangements for integrating the SUPLAN into the overall plan.
4. **Service Support.** This paragraph should include or make reference to arrangements for replenishment and maintenance of materiel and equipment, levels of reserves, stock holding policies, and the provision of services: transportation, allocation of labour, postal, food services and other materiel services. The materiel and service sub-headings, which follow, are optional and not all inclusive.
  - a. **Supply.** Arrangements for daily requirements (ammo, POL, rations, water, spare parts, etc) for a fixed initial period and sustainment for the periods thereafter;
  - b. **Transportation.** Including all modes (sea, inland waters, land and air);
  - c. **Services.** Decontamination, printing, laundry and bath, etc;
  - d. **Labour.** Military and civilian;
  - e. **Maintenance.** Repair and recovery of materiel, major equipment and combat systems;
  - f. **Salvage.** Materiel and Equipment;
  - g. **HNS.** This topic may be the subject of a stand alone paragraph or a separate annex as aspects of HNS may be dealt with in appropriate functional paragraphs; and
  - h. **Logistics Facilities Requirements.**

CFJP 5.0

5. **Command and Signals.** Special C2 arrangements, including chains of command, command relationships, TOCA instructions, location of HQ, etc.

Commander's signature

Annexes/supporting documents

Distribution list

**ANNEX G - FORMAT FOR A LETTER OF PROMULGATION**

(This is a guide, not a rigid format.)

**SECURITY CLASSIFICATION**

(Place the required classification at the top and bottom of every page)

3120-5-00910/02 (file number)

DD MMM YY (date)

Distribution List (addressees)

LETTER OF PROMULGATION -

**ORIGINATOR – TYPE – NUMBER – NAME – DESCRIPTION**

(For example, CDS CONPLAN 00910/02 RECUPERATION - (insert synopsis of mission statement))

**References:** A. (references as required)

1. ( ) **Promulgation.** (Example only) The enclosed plan was prepared in response to (CDS / Federal Cabinet direction, etc.) (reference A). It was reviewed and approved by (...) on (date) (reference B). It was approved by (...) on (date). J5 Plans is the OPI for this plan, and Director Maritime Force Employment (DMFE) and Director of Air Force Employment (D Air FE) are OCIs.
2. ( ) **Plan Synopsis.** A plan synopsis shall provide the following information:
  - a. Summary of Situation.
  - b. Mission (verbatim).
  - c. Summary of CONOPS.
3. ( ) **Implementation.** CONPLAN 00910/02 shall be implemented as follows:
  - a. **Initiation of Planning.** The plan is effective for planning as of (date). (*on receipt is not to be used*)
  - b. **Plan Review.** Draft plans are to be submitted for CDS review and approval by (date).
  - c. **Execution.** CONPLAN 00910/02 will be effective for execution on (date/time) (more text as required).

This CONPLAN will be executed as CDS OP O 00909/YY, OP RECUPERATION (example only) on order. Execution will be ordered by message. Receipt of this order shall be acknowledged immediately.

Or

This CONPLAN is not sufficiently detailed to be capable of execution. The purpose of this plan is to facilitate the preparation of future (type) operations as required.

(Signature block)

DISTRIBUTION LIST

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**ANNEX H - FORMAT FOR AN IMPLEMENTATION ORDER**

(This is a guide, not a rigid format)

**Note:** Impl Os should only be used when a CONPLAN/OPLAN may be executed with minor changes. If this message becomes cumbersome, then a new OP O should be promulgated as per Annex H.

FROM: NDHQ OTTAWA

TO: TF COMD  
SUPPORTING COMMANDS  
NDHQ AGENCIES

INFO: AS REQUIRED

SIC: AS REQUIRED

SECURITY CLASSIFICATION

ORIGINATOR'S NUMBER:

SUBJ: IMPLEMENTATION ORDER – CONPLAN RECUPERATION

REFS: A. CDS CONPLAN 00910/02 CONPLAN RECUPERATION

B. CDS WNG O (DTG)

1. REF A IS TO BE IMPLEMENTED AS CDS OP O 00910/YY, OP RECUPERATION WITH THE FOLLOWING AMENDMENTS:
2. SITUATION. SHORT SUMMARY OF THE SITUATION, INCLUDING UPDATES TO THE CONPLAN AS APPROPRIATE, SUCH AS FACTS/ASSUMPTIONS THAT MAY AFFECT THE MISSION.
3. MISSION. CONFIRM THE MISSION TO BE ACCOMPLISHED AND ITS PURPOSE.
4. EXECUTION.
  - 4.A. CONCEPT OF OPERATIONS. PROVIDE CONFIRMATION OR MODIFICATION TO THE CONPLAN.
  - 4.B. PROBABLE TASKS/MISSIONS. CONFIRM OR PROVIDE ADDITIONAL INFORMATION ON TASKS TO TF COMD, CMS, CLS, CAS, ETC.
  - 4.C. COORDINATING INSTRUCTIONS. PROVIDE TIMINGS AND OTHER ADDITIONAL COORDINATION REQUIREMENTS
  - 4.D. SERVICE SUPPORT. PROVIDE ANY ADDITIONAL INFORMATION SPECIFIC TO THE OPERATION.
  - 4.E. COMMAND AND SIGNALS. CONFIRM OR UPDATE:

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**ANNEX I - FORMAT FOR AN OPERATION PLAN/ORDER – LETTER/MSG FORMAT**  
(Adapted from STANAG 2014)

SECURITY CLASSIFICATION

Place the required classification at the top and bottom of every page

File No.

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Issuing Headquarters

Place of Issue (may be in code)

Date-Time Group of Signature

Message Reference No.

**ORIGINATOR – TYPE – NUMBER – OP NAME**

(E.G. CDS OP O 00950/02, OP MAJESTIC)

References: Maps, charts and relevant documents (see STANAG 2029)

Time Zone used throughout the Order:

**Task organization:** This information may be provided in Paragraph 3 "EXECUTION" or in an Annex, which may be in text or graphical form. Under this heading, as appropriate, give the sub-division of the force, including attached units, command relationships, states of command, together with the names and ranks of the commanders when necessary.

1. **Situation.** Briefly give the general picture so that subordinate commanders will understand the current situation under the following headings:
  - a. **Enemy Forces.** Composition, estimated strengths, identification, disposition, current location, movement anticipated, capabilities, and assessment of intentions. References may be made to other record documents that amplify information included here;
  - b. **Friendly Forces.** Information concerning friendly forces other than those covered by the Op O, which should directly affect the action of subordinate commanders. These forces include those not attached or organic to the command of the contemplated operation, but whose presence on a flank or other adjacent area is of interest. Include information on such forces that subordinate commanders need to know in order to accomplish their tasks. This includes the mission of the higher unit, and should include the higher commander's intent and/or concept of the operation, one level up;
  - c. **Attachments and Detachments.** Units attached to or detached from the issuing formation/unit, together with the times they are effective may be listed here, in an annex, or both; and
  - d. **Commander's Evaluation.** This is an optional subparagraph to be used when directed. It gives briefly the commander's evaluation of the situation.
2. **Mission.** A clear, concise statement of the task(s) to be accomplished by the commander and its purpose. This paragraph must not be sub-paragraphed.
3. **Execution.** This paragraph will be laid out to suit the requirements of the particular operation. Summarize the overall course of action intended, or CONOPS. In subsequent paragraphs, assign

specific tasks to each element of the task organization charged with the execution of operations required to accomplish the CONOPS or in support of those operations, and give details of coordination and task organization not already given in the task organization section. Instructions applicable to two or more elements of the task organization can be set forth in a final paragraph of this section headed "coordinating instructions." Intent: Accurately convey to subordinates the commander's intent.

- a. **Concept of Operations.** Describe, in brief, how the commander visualizes the execution of the operation from start to completion. The Commander's Intent is a concise expression of the purpose of the operation, which describes the desired end state. It should be understood two echelons down and helps his subordinates focus on what has to be accomplished in order to achieve success so that mission accomplishment is possible in the time available and in the absence of additional communications or further instructions. This paragraph should set forth the phases of the operation; schemes of manoeuvre for major subordinate task elements that describe precisely what the commander expects to be done; general plans for the employment of supporting fires and weapons, and the general plan for the landing force in amphibious operations;
  - b. **Tasks/Missions to Sub Units.** Subsequent subparagraphs assign specific tasks to each element of the command charged with the execution of tactical duties, and give details of coordination and the task organization/groupings if not included under "Task Organization" or in an annex; and
  - c. **Coordinating Instructions.** Instructions applicable to two or more elements of the task organization. Typically, such instructions might include boundaries, objectives, beaches, lines of departure, time and direction of attack, and other specifics needed to coordinate the activities of different task elements. Other information is also included, such as reporting instructions, anticipated time of execution and when the order becomes effective for planning and/or execution.
4. **Service Support.** State administrative and logistics arrangements applicable to the operation. Describe the manner of logistics support for the contemplated operation. At higher command levels this paragraph could state, "See Administrative/ Service Support Order". At lower command levels this paragraph, or the Service Support annex, may eliminate the need for an Administrative/Service Support Order.
- a. **Support Concept.** Include enough information to make clear the basic concept for logistics support. Summarize the overall operation from the Combat Service and Combat Service Support perspectives;
  - b. **Materiel and Services.** List materiel and services for supply, maintenance, transportation, and construction, and allocation of labour for logistics purposes;
  - c. **Medical Evacuation and Hospitalization.** List plans and policies for hospitalization and evacuation of military and civilian personnel;
  - d. **Personnel.** List unit strengths, replacements and personnel policies and procedures, including those pertaining to civilians and enemy prisoners of war;
  - e. **CIMIC.** Describe control of civil population, refugees, and other relevant civil affairs matters; and
  - f. **Miscellaneous.** In many cases, reference to administrative and logistics policies and procedures in an existing plan as amended by the Op O will suffice.
5. **Command and Signals.** Include signal, recognition, and identification instructions; electronic policy; HQ locations and movements; code words; code names; and liaison.



- a. **Command and Control.** Give information about pertinent command, control, and communications nets; operating procedures; recognition and identification procedures; electronic emission constraints; etc. A separate annex may be required, or reference to an existing plan may be made; and
- b. **Command.** Multinational operations can have complex command relationships. Op Os must be specific concerning these arrangements, including shifts that may take place as the operation progresses from one phase to the next. Clearly state all command relationships. Include command posts, and alternate command posts with their times of activation and deactivation.

## ACKNOWLEDGE

**NAME** (Commander's last name)  
**RANK**

**OFFICIAL** (Authentication) Use only when applicable. If the commander signs the original, no further authentication is required. If the commander didn't sign, then authentication by the signature of the preparing staff officer with only the last name and rank of the commander appearing in the signature block.

## ANNEXES

## DISTRIBUTION

**OP O - MESSAGE FORMAT**  
(This is a guide, not a rigid format)

FROM: ISSUING HQ  
TO: TF COMD  
SUPPORTING COMMANDS AND AGENCIES  
INFO: AS REQUIRED  
SIC: AS REQUIRED  
SECURITY CLASSIFICATION  
ORIGINATOR'S NUMBER:  
SUBJ: ORIGINATOR – TYPE – NUMBER – OP NAME  
(E.G. CDS OP O 00950/02, OP MAJESTIC  
REFS: A. (AS REQUIRED)

1. **SITUATION.** BRIEFLY GIVE THE GENERAL PICTURE SO THAT SUBORDINATE COMMANDERS WILL UNDERSTAND THE CURRENT SITUATION UNDER THE FOLLOWING HEADINGS:
  - 1.A. **ENEMY FORCES.** COMPOSITION, ESTIMATED STRENGTHS, IDENTIFICATION, DISPOSITION, CURRENT LOCATION, MOVEMENT ANTICIPATED, CAPABILITIES, AND ASSESSMENT OF INTENTIONS. REFERENCES MAY BE MADE TO OTHER RECORD DOCUMENTS THAT AMPLIFY INFORMATION INCLUDED HERE;
  - 1.B. **FRIENDLY FORCES.** INFORMATION CONCERNING FRIENDLY FORCES WHICH SHOULD DIRECTLY AFFECT THE ACTION OF SUBORDINATE COMMANDERS. THESE FORCES INCLUDE THOSE NOT ATTACHED OR ORGANIC TO THE COMMAND OF THE CONTEMPLATED OPERATION, BUT WHOSE PRESENCE ON A FLANK OR OTHER ADJACENT AREA IS OF INTEREST. INCLUDE INFORMATION ON SUCH FORCES THAT SUBORDINATE COMMANDERS NEED TO KNOW IN ORDER TO ACCOMPLISH THEIR TASKS. THIS INCLUDES THE MISSION OF THE HIGHER UNIT, AND SHOULD INCLUDE THE HIGHER COMMANDER'S INTENT AND/OR CONCEPT OF THE OPERATION, ONE LEVEL UP;
  - 1.C. **ATTACHMENTS AND DETACHMENTS.** UNITS ATTACHED TO OR DETACHED FROM THE ISSUING FORMATION/UNIT, TOGETHER WITH THE TIMES THEY ARE EFFECTIVE MAY BE LISTED HERE, IN AN ANNEX, OR BOTH; AND
  - 1.D. **COMMANDER'S EVALUATION.** THIS IS AN OPTIONAL SUBPARAGRAPH TO BE USED WHEN DIRECTED. IT GIVES BRIEFLY THE COMMANDER'S EVALUATION OF THE SITUATION.
2. **MISSION.** A CLEAR, CONCISE STATEMENT OF THE TASK(S) TO BE ACCOMPLISHED BY THE COMMANDER AND ITS PURPOSE. THIS PARAGRAPH MUST NOT BE SUB-PARAGRAPHED.
3. **EXECUTION.** THIS PARAGRAPH WILL BE LAID OUT TO SUIT THE REQUIREMENTS OF THE PARTICULAR OPERATION. SUMMARIZE THE OVERALL COURSE OF ACTION INTENDED, OR CONOPS. IN SUBSEQUENT PARAGRAPHS, ASSIGN SPECIFIC TASKS TO EACH ELEMENT OF THE TASK ORGANIZATION CHARGED WITH THE EXECUTION OF OPERATIONS REQUIRED TO

ACCOMPLISH THE CONOPS OR IN SUPPORT OF THOSE OPERATIONS, AND GIVE DETAILS OF COORDINATION AND TASK ORGANIZATION NOT ALREADY GIVEN IN THE TASK ORGANIZATION SECTION. INSTRUCTIONS APPLICABLE TO TWO OR MORE ELEMENTS OF THE TASK ORGANIZATION CAN BE SET FORTH IN A FINAL PARAGRAPH OF THIS SECTION HEADED "COORDINATING INSTRUCTIONS."

- 3.A. **CONCEPT OF OPERATIONS.** DESCRIBE, IN BRIEF, HOW THE COMMANDER VISUALIZES THE EXECUTION OF THE OPERATION FROM START TO COMPLETION. THE COMMANDER'S INTENT IS A CONCISE EXPRESSION OF THE PURPOSE OF THE OPERATION WHICH DESCRIBES THE DESIRED END STATE. IT SHOULD BE UNDERSTOOD TWO ECHELONS DOWN AND HELPS HIS SUBORDINATES FOCUS ON WHAT HAS TO BE ACCOMPLISHED IN ORDER TO ACHIEVE SUCCESS SO THAT MISSION ACCOMPLISHMENT IS POSSIBLE IN THE TIME AVAILABLE AND IN THE ABSENCE OF ADDITIONAL COMMUNICATIONS OR FURTHER INSTRUCTIONS. THIS PARAGRAPH SHOULD SET FORTH THE PHASES OF THE OPERATION; SCHEMES OF MANOEUVRE FOR MAJOR SUBORDINATE TASK ELEMENTS THAT DESCRIBE PRECISELY WHAT THE COMMANDER EXPECTS TO BE DONE; GENERAL PLANS FOR THE EMPLOYMENT OF SUPPORTING FIRES AND WEAPONS; AND THE GENERAL PLAN FOR THE LANDING FORCE IN AMPHIBIOUS OPERATIONS;
- 3.B. **TASK ORGANIZATION / MISSIONS TO SUB UNITS.** UNDER THIS HEADING, AS APPROPRIATE, GIVE THE SUB-DIVISION OF THE FORCE, INCLUDING ATTACHED UNITS, COMMAND RELATIONSHIPS, STATES OF COMMAND, TOGETHER WITH THE NAMES AND RANKS OF THE COMMANDERS WHEN NECESSARY. SUBSEQUENT SUBPARAGRAPHS ASSIGN SPECIFIC TASKS TO EACH ELEMENT OF THE COMMAND CHARGED WITH THE EXECUTION OF TACTICAL DUTIES, AND GIVE DETAILS OF COORDINATION AND THE TASK ORGANIZATION/GROUPINGS IF NOT INCLUDED ELSEWHERE; AND
- 3.C. **COORDINATING INSTRUCTIONS.** INSTRUCTIONS APPLICABLE TO TWO OR MORE ELEMENTS OF THE TASK ORGANIZATION. TYPICALLY, SUCH INSTRUCTIONS MIGHT INCLUDE BOUNDARIES, OBJECTIVES, BEACHES, LINES OF DEPARTURE, TIME AND DIRECTION OF ATTACK, AND OTHER SPECIFICS NEEDED TO COORDINATE THE ACTIVITIES OF DIFFERENT TASK ELEMENTS. OTHER INFORMATION IS ALSO INCLUDED, SUCH AS REPORTING INSTRUCTIONS, ANTICIPATED TIME OF EXECUTION, AND WHEN THE ORDER BECOMES EFFECTIVE FOR PLANNING AND/OR EXECUTION.
4. **SERVICE SUPPORT** STATE ADMINISTRATIVE AND LOGISTICS ARRANGEMENTS APPLICABLE TO THE OPERATION. DESCRIBE THE MANNER OF LOGISTICS SUPPORT FOR THE

CONTEMPLATED OPERATION. AT HIGHER COMMAND LEVELS THIS PARAGRAPH COULD STATE "SEE ADMINISTRATIVE/ SERVICE SUPPORT ORDER". AT LOWER COMMAND LEVELS THIS PARAGRAPH, OR THE SERVICE SUPPORT ANNEX, MAY ELIMINATE THE NEED FOR AN ADMINISTRATIVE/SERVICE SUPPORT ORDER.

- 4.A. **SUPPORT CONCEPT.** INCLUDE ENOUGH INFORMATION TO MAKE CLEAR THE BASIC CONCEPT FOR LOGISTICS SUPPORT. SUMMARIZE THE OVERALL OPERATION FROM THE COMBAT SERVICE AND COMBAT SERVICE SUPPORT PERSPECTIVE.
  - 4.B. **MATERIEL AND SERVICES.** LIST MATERIEL AND SERVICES FOR SUPPLY, MAINTENANCE, TRANSPORTATION, AND CONSTRUCTION, AND ALLOCATION OF LABOUR FOR LOGISTICS PURPOSES;
  - 4.C. **MEDICAL EVACUATION AND HOSPITALIZATION.** LIST PLANS AND POLICIES FOR HOSPITALIZATION AND EVACUATION OF MILITARY AND CIVILIAN PERSONNEL;
  - 4.D. **PERSONNEL.** LIST UNIT STRENGTHS, REPLACEMENTS, AND PERSONNEL POLICIES AND PROCEDURES, INCLUDING THOSE PERTAINING TO CIVILIANS AND ENEMY PRISONERS OF WAR;
  - 4.E. **CIMIC.** DESCRIBE CONTROL OF CIVIL POPULATION , REFUGEES, AND OTHER RELEVANT CIVIL AFFAIRS MATTERS; AND
  - 4.F. **MISCELLANEOUS.** IN MANY CASES, REFERENCE TO ADMINISTRATIVE AND LOGISTICS POLICIES AND PROCEDURES IN AN EXISTING PLAN AS AMENDED BY THE OP O WILL SUFFICE.
5. **COMMAND AND SIGNALS.** INCLUDE SIGNAL, RECOGNITION, AND IDENTIFICATION INSTRUCTIONS; ELECTRONIC POLICY; HQ LOCATIONS AND MOVEMENTS; CODE WORDS; CODE NAMES; AND LIAISON.
- 5.A. **COMMAND AND CONTROL.** GIVE INFORMATION ABOUT PERTINENT COMMAND, CONTROL, AND COMMUNICATIONS NETS; OPERATING PROCEDURES; RECOGNITION AND IDENTIFICATION PROCEDURES; ELECTRONIC EMISSION CONSTRAINTS; ETC. A SEPARATE ANNEX MAY BE REQUIRED, OR REFERENCE TO AN EXISTING PLAN MAY BE MADE; AND
  - 5.B. **COMMAND.** MULTINATIONAL OPERATIONS CAN HAVE COMPLEX COMMAND RELATIONSHIPS. OP OS MUST BE SPECIFIC CONCERNING THESE ARRANGEMENTS, INCLUDING SHIFTS THAT MAY TAKE PLACE AS THE OPERATION PROGRESSES FROM ONE PHASE TO THE NEXT. CLEARLY STATE ALL COMMAND RELATIONSHIPS. INCLUDE COMMAND POSTS, AND ALTERNATE COMMAND POSTS WITH THEIR TIMES OF ACTIVATION AND DEACTIVATION.

## ACKNOWLEDGE

**ANNEX J - FORMAT FOR FRAG ORDERS TO EXISTING OP O – LETTER/MSG FORMAT**  
(Reproduced from STANAG 2014)

**SECURITY CLASSIFICATION**  
(Place the required classification at the top and bottom of every)

File No

Copy No \_\_\_\_ of \_\_\_\_ copies  
Issuing Headquarters  
(Optional) Place of Issue (may be in code)  
Date-Time Group of Signature  
Message Reference No.

**FRAG O XX (sequential number) TO ORIGINATOR - OP O – NUMERICAL DESIGNATION- OP NAME**  
(For example, FRAG O 01 TO CDS OP O 00950/02, OP MAJESTIC)

**References:**

**Task Organization**

Time Zone Used Throughout the Order (Optional)

1. **SITUATION.** (Mandatory) Include any changes to the existing order.
2. **MISSION.** (Mandatory) List the new mission.
3. **EXECUTION.**

**Intent:** (Mandatory) Include any changes to the existing order.

- a. Concept of Operations. (Mandatory);
- b. Tasks/Missions to Subordinate Units. (Mandatory); and
- c. Coordinating Instructions. (Mandatory) Include the statement, "The current overlay remains in effect" or "See change one to Annex C, Operations Overlay," "Mark any changes to control measures on the overlay." As time permits, issue a new overlay.
4. **SERVICE SUPPORT.** No change to Op O "XXXXX/XX".
5. **COMMAND AND SIGNAL.** No change to Op O "XXXXX/XX".

**ACKNOWLEDGE** (Mandatory)

**NAME** (Commander's last name)  
**RANK** (Mandatory)

**OFFICIAL** (Optional)

**ANNEXES** (Optional)

**DISTRIBUTION** (Optional)

**FRAG O - MESSAGE FORMAT**  
(This is a guide, not a rigid format)

FROM: ISSUING HQ  
TO: TF COMD  
SUPPORTING COMMANDS AND AGENCIES  
INFO: AS REQUIRED  
SIC: AS REQUIRED  
SECURITY CLASSIFICATION  
ORIGINATOR'S NUMBER:  
SUBJ: **FRAG O XX (sequential number) TO ORIGINATOR - OP O – NUMERICAL DESIGNATION-  
OP NAME**  
(For example, FRAG O 01 TO CDS OP O 00950/02, OP MAJESTIC)  
REFS: A. (AS REQUIRED)

1. SITUATION. (MANDATORY) INCLUDE ANY CHANGES TO THE EXISTING ORDER.
2. MISSION. (MANDATORY) LIST THE NEW MISSION.
3. EXECUTION.
  - 3.A. CONCEPT OF OPERATIONS. (MANDATORY) INCLUDE ANY CHANGES TO THE EXISTING ORDER;
  - 3.B. TASKS/MISSIONS TO SUBORDINATE UNITS. (MANDATORY); AND
  - 3.C. COORDINATING INSTRUCTIONS. (MANDATORY) INCLUDE THE STATEMENT "THE CURRENT OVERLAY REMAINS IN EFFECT" OR "SEE CHANGE ONE TO ANNEX C, OPERATIONS OVERLAY," "MARK ANY CHANGES TO CONTROL MEASURES ON THE OVERLAY." AS TIME PERMITS, ISSUE A NEW OVERLAY.
4. SERVICE SUPPORT. NO CHANGE TO OP O "XXXXX/XX".
5. COMMAND AND SIGNAL. NO CHANGE TO OP O "XXXXX/XX".

**ACK** (Mandatory)

**ANNEX K - FORMAT FOR ANNEX TO AN OP O OR PLAN**

(This is a guide not a rigid format. See STANAG 2014 for sample content of specific annexes)

**SECURITY CLASSIFICATION**

(Place the required classification at the top and bottom of every page)

File No

Copy No \_\_\_ of \_\_\_\_

Issuing Headquarters

Place of Issue

Date/Time of Authorization

**ANNEX (SPECIFY) TO OP O – ORIGINATOR - NUMERICAL DESIGNATION - OP NAME**

(For example. ANNEX S - MOVEMENT TO CDS OP O 00950/02, OP MAJESTIC)

Reference: Appropriate maps, charts and reports

1. **Situation.** A general statement of the factors affecting the support of the operation. Must include a description of the overall mission, outline CONOP and, if relevant, the task organization.
2. **Mission.** A concise statement of the mission of the supporting organization.
3. **Execution.** Contains an outline of how the mission is to be carried out by units and formations alone or in conjunction with OGDs or HNS.
  - a. **Concept of Operations.** This is a statement of the broad concept for the support of the TF MISSION.
  - b. **Tasks.** Provide details of tasks to subordinate formations / units;
  - c. **Coordinating Instructions.** Describe the arrangements for integrating the annex into the overall plan.
4. **Service Support.** This paragraph should include or make reference to service support orders, other arrangements for replenishment and maintenance of materiel and equipment, levels of reserves, stock holding policies and the provision of services: transportation, allocation of labour, postal, food services and other materiel services. The materiel and service sub-headings, which follow, are optional and not all inclusive.
  - a. **Supply.** Arrangements for daily requirements (ammo, POL, rations, water, spare parts, etc) for a fixed initial period and sustainment for the periods thereafter;
  - b. **Transportation.** Including all modes (sea, inland waters, land and air);
  - c. **Services.** Decontamination, printing, laundry and bath, etc;
  - d. **Labour.** Military and civilian;
  - e. **Maintenance.** Repair and recovery of materiel, major equipment and combat systems;
  - f. **Salvage.** Materiel and Equipment;
  - g. **HNS.** This topic may be the subject of a stand alone paragraph or a separate annex as aspects of HNS may be dealt within appropriate functional paragraphs; and
  - h. **Logistics Facilities Requirements.**

CFJP 5.0

5. **Command and Signals.** Special C2 arrangements, including chains of command, command relationships, TOCA instructions, location of HQ, etc.

Commander's signature

Annexes/supporting documents

Distribution list



**ANNEX TO AN OP O - MESSAGE FORMAT**

(This is a guide not a rigid format)

FROM: ISSUING HQ  
 TO: TF COMD  
 SUPPORTING COMMANDS AND AGENCIES  
 INFO: AS REQUIRED  
 SIC: AS REQUIRED  
 SECURITY CLASSIFICATION  
 ORIGINATOR'S NUMBER:  
 SUBJ: ANNEX (SPECIFY) TO OP O – ORIGINATOR - NUMERICAL DESIGNATION - OP NAME  
 (E.G. ANNEX S - MOVEMENT TO CDS OP O 00950/02, OP MAJESTIC.)  
 REF: AS REQUIRED

1. SITUATION. A GENERAL STATEMENT OF THE FACTORS AFFECTING THE SUPPORT OF THE OPERATION. MUST INCLUDE A DESCRIPTION OF THE OVERALL MISSION, OUTLINE CONOPS AND, IF RELEVANT, THE TASK ORGANIZATION.
2. MISSION. A CONCISE STATEMENT OF THE MISSION OF THE SUPPORTING ORGANIZATION.
3. EXECUTION. CONTAINS AN OUTLINE OF HOW THE MISSION IS TO BE CARRIED OUT BY UNITS AND FORMATIONS ALONE OR IN CONJUNCTION WITH OGDS OR HNS.
  - 3.A. CONCEPT OF OPERATIONS. THIS IS A STATEMENT OF THE BROAD CONCEPT FOR THE SUPPORT OF THE TF MISSION.
  - 3.B. TASKS. PROVIDE DETAILS OF TASKS TO SUBORDINATE FORMATIONS / UNITS;
  - 3.C. COORDINATING INSTRUCTIONS. DESCRIBE THE ARRANGEMENTS FOR INTEGRATING THE ANNEX INTO THE OVERALL PLAN.
4. SERVICE SUPPORT. THIS PARAGRAPH SHOULD INCLUDE OR MAKE REFERENCE TO SERVICE SUPPORT ORDERS, OTHER ARRANGEMENTS FOR REPLENISHMENT AND MAINTENANCE OF MATERIEL AND EQUIPMENT, LEVELS OF RESERVES, STOCK HOLDING POLICIES, AND THE PROVISION OF SERVICES: TRANSPORTATION, ALLOCATION OF LABOUR, POSTAL, FOOD SERVICES AND OTHER MATERIEL SERVICES. THE MATERIEL AND SERVICE SUB-HEADINGS, WHICH FOLLOW, ARE OPTIONAL AND NOT ALL INCLUSIVE.
  - 4.A. SUPPLY. ARRANGEMENTS FOR DAILY REQUIREMENTS (AMMO, POL, RATIONS, WATER, SPARE PARTS, ETC) FOR A FIXED INITIAL PERIOD AND SUSTAINMENT FOR THE PERIODS THEREAFTER;
  - 4.B. TRANSPORTATION. INCLUDING ALL MODES (SEA, INLAND WATERS, LAND AND AIR);
  - 4.C. SERVICES. DECONTAMINATION, PRINTING, LAUNDRY AND BATH, ETC;
  - 4.D. MAINTENANCE. REPAIR AND RECOVERY OF MATERIEL, MAJOR EQUIPMENT AND COMBAT SYSTEMS;
  - 4.E. HNS. THIS TOPIC MAY BE THE SUBJECT OF A STAND ALONE PARAGRAPH OR A SEPARATE ANNEX AS ASPECTS OF HNS MAY BE DEALT WITH IN APPROPRIATE FUNCTIONAL PARAGRAPHS; AND
  - 4.F. LOGISTICS FACILITIES REQUIREMENTS.
5. COMMAND AND SIGNALS. SPECIAL C2 ARRANGEMENTS, INCLUDING CHAINS OF COMMAND, COMMAND RELATIONSHIPS, TOCA INSTRUCTIONS, LOCATION OF HQ, ETC.

ACK

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**ANNEX L - FORMAT FOR A TERMINATION ORDER**

(This is a guide, not a rigid format)

FROM: ISSUING HQ  
TO: TF COMD  
SUPPORTING COMMANDS AND AGENCIES  
INFO: AS REQUIRED  
SIC: AS REQUIRED  
SECURITY CLASSIFICATION  
ORIGINATOR'S NUMBER:  
SUBJ: TERMINATION ORDER FOR OP (NAME)  
(E.G., TERMINATION ORDER FOR OP MAJESTIC.)  
REF: A. CDS OP O 00950/02, OP MAJESTIC  
B. AS REQUIRED

1. OP MAJESTIC IS TERMINATED AS OF (DATE).
2. GENERAL TEXT AS REQUIRED.

ACK

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## ANNEX M - FORMAT FOR A CDS DIRECTIVE

CDS Letterhead

Date

Distribution List

### CDS DIRECTIVE FOR XXX

**References:** *Applicable Act of Parliament* (Such as the National Defence Act, the Emergencies Act), **Order in Council** (Such as CF Assistance to Provincial Police Forces), **Policy** (Such as Securing an Open Society: Canada's National Security Policy, 27 April 2004, or Canada's International Policy Statement, 19 April 2005), **Memorandum of Understanding** (Such as Surface Ship Patrols and Aerial Fisheries Surveillance), **Departmental Directive** (Such as DND Provision of Service), **Doctrine** (Such as B-GJ-005-300/FP-000, Canadian Forces Operations), **Plan** (Such as COP GRIFFON, Deployment of the DART), etc.

#### 1. (Classification) **Situation**

- a. (Classification) **General.** A short summary of the geopolitical elements of the problem. (To be completed by CDI and DG IS Pol).
- b. (Classification) **Problem Definition.** As applicable, a short statement of the problem at hand.
- c. (Classification) **Threat Assessment.** *(To be completed by CDI).*
- d. (Classification) **Instruments of national Power.** A short synopsis of how Defence, Diplomacy and Development interact in the pursuit of national interests relating to the situation.
- e. (Classification) **GoC Departmental Responsibilities.** A short synopsis of the relevant roles and responsibilities of OGD having a stake in the operation.
- f. (Classification) **Assumptions.** Key assumptions will normally include potential allied commitments, host nation support, etc.
- g. (Classification) **National Policy.** Defined, for the purpose of force employment, as "...the expression of the desired end-state sought by the government [and] guidance for the employment of the instruments of power." Includes, if required, MND or DFAIT approval of an operation. (To be completed by DG IS Pol).
  - (1) Fundamental or Wider Policy Goals. Applicable extracts from National Security Policy or International Policy. (To be completed by DG IS Pol).
  - (2) National Goals. An open-ended statement of a desired outcome related to the specific problem, with no quantification of what is to be achieved and no time criteria for completion.
  - (3) National Objectives. The clearly defined, decisive and attainable goals toward which national instruments of power are directed and applied. National objectives are closely tied to national interests, foreign policy and national security. Rather than statements of action higher-order objectives can be expressed as conditions, or outcomes. In a "whole of government" approach, for international operations, national objectives should incorporate diplomatic, military, economic, developmental and informational dimensions. In a domestic operation, national objectives should incorporate sovereignty and/or, public security and welfare

dimensions. If not yet fully developed or harmonized between government departments, national objectives should be stated here as CDS assumptions, and clearly identified as such. (To be completed by DG IS Pol).

- (4) National Policy End State. The set of required conditions that defines achievement of national objectives. Ideally written as a short, descriptive paragraph. (To be completed by DG IS Pol).
- (5) (Classification) Limitations.
  - i. **Constraints.** *Including, for example, specific GoC instructions or diplomatic notes.*
  - ii. **Restraints.** *Including, for example, the requirement for MND or DFAIT approval before commencement of the operation.*
- h. (Classification) **UN/Alliance/Coalition Policy** *(If applicable)(To be completed by DG IS Pol).*
  - (1) **UNSCR.** *(If applicable)*
  - (2) **Policy Objectives.** *Multinational policy objectives can be very difficult to define/harmonize and may well be ratified much later, perhaps after operations have begun. Nevertheless, it is likely that broad principles of action, often expressed within a UNSCR, will serve to guide multinational policy.*
  - (3) **End State.**
  - (4) **Concept of Operations.**
  - i. (Classification) **UN/Alliance/Coalition Strategy.** *(If applicable) Synopsis of forces, objectives and transition conditions or end-state. Should include elements of the CONOPS. (To be completed by DG Plans in the document).*

2. (Classification) **Mission.** Mission statements, although essential at the tactical level to unify the action of multiple elements into a single succinct understanding of the task at hand, may start to lose some of their utility at the operational level. Indeed, the multidimensional nature of operations at the latter level either leads to meaningless generic mission statement (“Conduct operations...”) or one in which painting the nature of the mission merely leads to repetition of strategic objectives. In a strategic directive, mission statements may not be useful, particularly so as an armed force such as the CF is typically involved in the pursuit of many separate, simultaneous and multidimensional operations, and is thus not in need of such a unifying statement of task. Mission statements are therefore not obligatory in CDS directives.

### 3. Execution.

- a. (Classification) **CDS Intent.** Focusing on the purpose and general effects of the operation. Should also include the degree of acceptable risk, and the relative priority of this operation over others.
- b. (Classification) **Strategic Objectives.** *In a “whole of government” approach, national objectives integrating the application of multiple instruments of national power could, in theory, suffice as statements of strategic objectives. It may, however, be necessary to clarify these further, hence the frequent use of strategic objectives in support of national objectives. Whilst in the past the nature of society and conflict led to the formulation of stovepipes strategies such as “Military Strategy,” the accelerating trend is towards the integration of all instruments of national power at the strategic, operational and, even, tactical levels. It is therefore more useful and practical to identify strategy with an organization such as the CF, rather than with an instrument of national power or function, such as military operations. Indeed, even though CF strategic objectives will tend to be predominantly military in nature, they will integrate multiple supporting instruments of national power, just as, say, CIDA strategies should incorporate supporting military*

operations. As a final consideration, CF strategic objectives can sometimes mirror alliance or coalition objectives.

- c. (Classification) **CF Transition Conditions.** *The set of required conditions or effects that defines a transition in the nature of CF Force Employment activities, Task Force mission or force structure, usually when an operation is nearing its end or undergoing significant change. They are the hinge to sequel operations or a state of military readiness, which, in cooperation with other instruments of national power, aim at the policy end-state and its enduring objectives. CF Transition Conditions therefore define the initiation, expansion, conversion, reduction or exit of Force Employment activities. They must be sufficiently detailed to provide operational level commanders with as clear a vision as possible of mission success. As such, CF Transition Conditions replace older, narrow, concepts such as “CF military end-state,” “CF strategic end-state,” “CF exit strategy,” “CF Criteria for success,” “triggers” etc. As a final consideration, although time per se should not constitute a condition, Transition Conditions may in fact bear heavily on the duration of an operation.*
- d. (Classification) **Risk Assessment.** *(To be completed by SJS, with assistance from CDI and others).*
- e. (Classification) **Strategic Centre of Gravity.** *(If applicable).*
- f. (Classification) **Conduct of Operations.** *A short description of the strategic concepts (ways) describing how strategic objectives will be achieved. Examples include: defence diplomacy, containment, deterrence, over-the-horizon high readiness response, forward defence, forward presence, nation capacity building, establishment of security, full-spectrum operations, stability and support, humanitarian assistance, support to UN/NATO/coalition in a minimalist role/leadership role/provision of key functions role etc. Could also include strategic phasing. However, care must be taken here not to impinge on operational level freedom of action. As such, campaign plans and campaign design concepts such as sequencing of operations, lines of operation, decisive points, simultaneity and depth etc. are not appropriate at the strategic level, and are best left to operational commanders.*
- g. (Classification) **Initial CDS Critical Information Requirements.**
  - (1) **Friendly Forces Information Requirements (FFIRs).** *Focusing OGD/Allied commitment.*
  - (2) **Priority Intelligence Requirement (PIRs).** *Focusing on an assessment of risk. To be completed by SJS and J2 Plans. In domestic operations, PIRs are usually replaced here by a statement of the intelligence problem, driving CDI’s production of the threat assessment.*
- h. (Classification) **Force Apportionment.** *At the strategic level, there is usually no requirement for complex task organization between multiple subordinate commanders. Rather, a single supported commander will receive an apportionment of forces as described in this paragraph.*
- i. (Classification) **Tasks.**
- j. (Classification) **Coordinating Instructions.**
  - (1) **Key dates and timings.**
  - (2) **Theatre of Operations.** *(If applicable)*
  - (3) **Area of Operations.**
  - (4) **Readiness.**
  - (5) **Reconnaissance.**
  - (6) **Preliminary Movement.**

- (7) **Rules of Engagement.**
  - (8) **Training.**
  - (9) **Targeting.**
  - (10) **Public Affairs posture.** *Active or passive.*
  - (11) **Other.** *Coordinating Instructions may also contain broad guidance on many topics such as Information Operations, PSYOPS, CBRN, Force protection, Legal, Lessons Learned etc. As a general rule, however, CDS Directives should go without or minimize such detail, which is often best left in the operational level plans and orders.*
4. (Classification) **Concept of Support** (A short synopsis of the concept of support, including financial direction. Amplifying details will be contained in the supporting CANOSCOM order.)
5. (Classification) **Command.**
- a. **Supported Commander.**
  - b. **Supporting Commanders.**
  - c. **TOCA.**
  - d. **SJS POCs.**
6. Please acknowledge receipt of this directive by email to NDCC Ops Watch NCM, Tel: 945-5551.

Initials and Name  
General/Admiral

**Annexes** As a general rule, CDS Directives need not contain annexes, which contain a level of detail that is best left in operational level plans and orders. One exception is Rules of Engagement, which could be published as an annex, or in a separate document.

Distribution List



## GLOSSARY

### **Area of Influence**

A geographical area wherein a commander is directly capable of influencing operations, by manoeuvre or fire support systems normally under his command or control. (AAP-6)

### **Area of Intelligence Responsibility**

An area allocated to a commander, in which he is responsible for the provision of intelligence, within the means at his disposal. (AAP-6)

### **Area of Interest**

The area of concern to a commander relative to the objectives of current or planned operations, including his areas of influence, operations and/or responsibility, and areas adjacent thereto. (AAP-6)

### **Area of Operations**

That portion of an area of war necessary for military operations and for the administration of such operations. (AAP-6)

### **Area of Responsibility (AOR)**

A defined area in which responsibility is specifically assigned to the commander of the area for the development and maintenance of installations, control of movement and the conduct of tactical operations involving military forces under his control along with parallel authority to exercise these functions. In naval usage, a predefined area of enemy terrain for which supporting ships are responsible for covering by fire on known targets or targets of opportunity and by observation. (AAP-6)

### **Campaign Plan**

A plan for a series of related military operations aimed at accomplishing a strategic or operational objective within a given time and space. (JOPES)

### **Centre of Gravity (COG)**

The COG is that characteristic, capability, or locality from which a military force, nation or alliance derives its freedom of action, physical strength, or will to fight. (AAP-6)

### **Command**

The authority vested in an individual of the armed forces for the direction, co-ordination, and control of military forces. (AAP-6)

### **Concept of Operations (CONOPS)**

The CONOPS expresses the military commander's intentions on the use of forces, time and space to achieve his mission, objectives, and end state. (GOP)

### **Contingency**

An unforecasted or chance situation, which may require a military response.

### **Contingency Plan (CONPLAN)**

An operation plan for contingencies that can reasonably be anticipated in a specific geographical area. A mechanism to address a potential future event or circumstance based on known or assumed planning factors. (GOP)

### **Coordinating Authority**

Coordinating Authority is the authority granted to a Commander or individual assigned responsibility for coordinating specific functions or activities involving forces of two or more countries or commands, or two

or more services or two or more forces of the same service. He or she has the authority to require consultation between the agencies involved or their representatives, but does not have the authority to compel agreement. In case of disagreement between the agencies involved, he should attempt to obtain essential agreement by discussion. In the event he is unable to obtain essential agreement, he shall refer the matter to the appropriate authority. (AAP-6)

### **Culmination**

Culmination is that point in an operation when the force can no longer successfully continue operations. It has both offensive and defensive implications. (GOP)

### **Decisive Points (DPs)**

Decisive points are the keys to getting at the centers of gravity. They may exist in time, space or in the information environment. (GOP)

### **Deliberate Planning**

Deliberate planning is not subject to the immediate pressures of time or prevailing threats. Deliberate planning consists of initiating and developing plans in anticipation of a known or anticipated future event or circumstance.

### **Fragmentary Order (FRAG O)**

A FRAG O is an abbreviated form of an Op O, issued as required to amend a previously issued Operations Order.

### **Full Command**

Full command is the military authority and responsibility of a superior officer to issue orders to subordinates and covers every aspect of military operations and administration. It exists only within national services. The term "command", as used internationally, implies a lesser degree of authority than when it is used in a purely national sense. It follows that no NATO, UN or other allied commander has full command over forces that are assigned to him. This is because nations, in assigning forces to NATO, or other allied commander assign only operational command or operational control. (AAP-6)

### **Implementation Order (IMPL O)**

An IMPL O is the mechanism used to direct the implementation of a plan.

### **Initiating Directive**

Specific, normally strategic-level, direction describing the broad concept of contemplated missions, associated planning constraints and assumptions, and intended mission end states.

### **Lines of Operations**

Lines of operations define the directional orientation of the force in time and space in relation to opposing forces. A force operates on "interior" lines when its operations diverge from a central point. A force operates on "exterior" lines when its operations converge on an enemy. (GOP)

### **Manoeuvre**

To manoeuvre is to seek to attain a position of advantage in respect to the opposition from which force can be threatened or applied. (GOP)

### **National Commander**

A national commander, territorial or functional, who is normally not in the allied chain of command.

### **Operational Command (OPCOM)**

The authority granted to a commander to assign missions or tasks to subordinate commanders, to deploy units, to reassign forces and to retain or delegate operational and/or tactical control as may be deemed

necessary. It does not of itself include responsibility for administration or logistics. May also be used to denote forces assigned to a commander. (AAP-6)

**Amplification.** In regards to NATO, the SAC would normally retain OPCOM. OPCOM cannot be reassigned without the agreement of the nation to whom the forces belong. (BI-SC Directive 80-80)

### **Operational Control (OPCON)**

The authority delegated to a commander to direct forces assigned so that the commander may accomplish specific missions or tasks, which are usually limited by function, time or location; to deploy units concerned and to retain or assign tactical control of those units. It does not include authority to assign separate employment of components of the units concerned. Neither does it, of itself, include administrative or logistic control. (AAP-6)

**Amplification.** The OPCOM authority would be expected to define the requirements for further delegation of OPCON on initial transfer. In any event, OPCON is understood to include also the authority to delegate TACOM. (BI-SC Directive 80-80)

### **Operational Pause**

A temporary cessation of operations after the attainment of major tactical or operational objectives, but prior to reaching one's own culminating point, to regenerate combat power in preparation for delivery of a decisive blow. (GOP)

### **Operational Planning Process (OPP)**

A coordinated staff process used by a commander to determine the best method of accomplishing assigned tasks and to direct the action necessary to accomplish the mission.

### **Operations Order (Op O)**

An Op O is a directive, usually formal, issued by a commander to subordinate commanders for the purpose of effecting the coordinated execution of an operation.

### **Operations Plan (OPLAN)**

An OPLAN is a mechanism that a commander uses to plan/prepare well in advance for a known up coming operation for which the Government has specifically tasked the CF to prepare and execute.

### **Operations Requirements**

In relation to routine or contingency CF operations, demands for new or changed equipment, maintenance of equipment, logistics support, support services, information, or personnel.

### **Preferred Course of Action**

The COA selected and approved by the commander for a specific mission, plus any appropriate guidance/direction for the next stage of planning.

### **Rapid Response Planning**

Rapid response planning consists of initiating and developing plans in response to a current or developing crisis.

### **Requirements**

A demand for new or changed equipment, maintenance of equipment, logistics support, information, or personnel.

### **Routine Operations**

Routine operations are force employment activities that are normally recurring in nature and can usually be planned for and programmed.

### **Strategic Direction**

Translation of policy direction into a framework for the application of resources needed for the defence of Canada and Canadian interests.

### **Supported Commander**

The commander having primary responsibility for all aspects of an operation as assigned by the CDS. In the context of CF Force Employment Planning, this term refers to the operational commander who prepares plans and orders in response to the direction of the CDS.

### **Supporting Commander**

A commander/Level 1 who provides augmentation forces or other support to a supported commander or who develops a supporting plan.

### **Supporting Plan (SUPLAN)**

A SUPLAN is a plan that provides detailed direction and information on a particular aspect of the plan. (GOP)

### **Sustainment**

The requirement for a military force to maintain its operational capability for the duration required to achieve its objectives. Sustainment consists of the continued supply of consumables, and the replacements of combat losses and non-combat attrition of equipment and personnel.

### **Tactical Command (TACOM)**

The authority delegated to a commander to assign tasks to forces under his command for the accomplishment of the mission assigned by higher authority. (AAP-6)

### **Tactical Control (TACON)**

TACON is the detailed, and usually local, direction and control of movements or maneuvers necessary to accomplish missions or tasks assigned. (AAP-6)

### **Tempo**

Tempo is the rate or rhythm of activity relative to the opposition, within tactical engagements and battles and between major operations. (GOP)

### **Termination Order (TERM O)**

A TERM O is issued to formally terminate an operation.

### **Transfer of Command Authority (TOCA)**

The formal transfer of a specified degree of authority over forces assigned to an operation between commanders of supporting commands and the supported commander. Within NATO, an action by which a member nation or NATO Command gives OPCOM or OPCON of designated forces to a NATO Command. (GOP)

### **Warning Order (Wng O)**

A Wng O is a notice of an impending operation and an order that is to follow.

## LIST OF ABBREVIATIONS

The following abbreviations are used in this publication.

<b>AOO</b>	Area of Operations	<b>JOA</b>	Joint Operations Area
<b>CC</b>	Capability Component	<b>JSAT</b>	Joint Staff Action Team
<b>CDS</b>	Chief of Defence Staff	<b>JSG</b>	Joint Support Group
<b>CF</b>	Canadian Forces	<b>JTF</b>	Joint Task Force
<b>CF JOG</b>	CF Joint Operations Group	<b>LOAC</b>	Law of armed conflict
<b>CF OPP</b>	CF Operational Planning Process	<b>LOC</b>	Lines of communication
<b>CFPD</b>	CF Publications Depot	<b>MIND</b>	Minister of National Defence
<b>CIMIC</b>	Civil-military Cooperation	<b>NATO</b>	North Atlantic Treaty Organization
<b>CIS</b>	Communications and Information Systems	<b>NCE</b>	National Command Element
<b>CJACC</b>	Canadian Joint Air Component Commander	<b>NDCC</b>	National Defence Command Centre
<b>CJLCC</b>	Canadian Joint Land Component Commander	<b>OCI</b>	Offices of Co-lateral Interest
<b>CJMCC</b>	Canadian Joint Maritime Component Commander	<b>OPI</b>	Offices of Primary Interest
<b>CJTL</b>	Canadian Joint Task List	<b>OPLAN</b>	Operations Plan
<b>CNC</b>	Canadian National Commander	<b>Op O</b>	Operations order
<b>C2</b>	Command and Control	<b>OPSEC</b>	Operations Security
<b>COA</b>	Course of Action	<b>OGD</b>	Other Government Department
<b>COG</b>	Centre of Gravity	<b>POC</b>	Point of contact
<b>CONOP</b>	Concept of Operations	<b>PA</b>	Public Affairs
<b>COP</b>	Contingency Operations Plan	<b>Recce</b>	Reconnaissance
<b>COS J3</b>	Chief of Staff J3	<b>ROE</b>	Rules of Engagement
<b>CPG</b>	Commander's Planning Guidance	<b>ROM</b>	Rough Order of Magnitude
<b>CSG</b>	Canadian Support Group	<b>SITREP</b>	Situation Report
<b>DCDS</b>	Deputy Chief of Defence Staff	<b>SOP</b>	Standard Operating Procedure
<b>DND</b>	Department of National Defence	<b>STANAG</b>	Standardization Agreement
<b>DPG</b>	Defence Planning Guidance	<b>SDP</b>	Standing Defence Plan
<b>ECS</b>	Environmental Chiefs of Staff	<b>SOFA</b>	Status of Forces Agreement
<b>FE</b>	Force Employment	<b>SUPLAN</b>	Supporting Plan
<b>FG</b>	Force Generation		
<b>Frag O</b>	Fragmentary Order		
<b>HNS</b>	Host Nation Support		
<b>Impl O</b>	Implementation order		
<b>IO</b>	Information Operations		

<b>Term O</b>	Termination Order	<b>TOCA</b>	Transfer of Authority
<b>TF</b>	Task Force	<b>TOO</b>	Theatre of Operations
<b>TF Comd</b>	Task Force Commander	<b>UN</b>	United Nations
<b>TFHQ</b>	Task Force Headquarters	<b>Wng O</b>	Warning Order