



**COMMON TRAINING
PROFICIENCY LEVEL FIVE
INSTRUCTIONAL GUIDE**



SECTION 1

EO M503.01 – CREATE A PROPOSAL

Total Time:

30 min

PREPARATION

PRE-LESSON INSTRUCTIONS

Resources needed for the delivery of this lesson are listed in the lesson specification located in A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 4. Specific uses for said resources are identified throughout the instructional guide within the TP for which they are required.

Review the lesson content and become familiar with the material prior to delivering the lesson.

Photocopy the Create a Proposal worksheet located at Attachment A for each cadet.

Photocopy the Create a Proposal Aide-Mémoire located at Attachment B for each cadet.

Photocopy the table of contents of A-CR-CCP-030/PT-001, *Water Safety Orders* for each cadet.

PRE-LESSON ASSIGNMENT

Nil.

APPROACH

An interactive lecture was chosen for this lesson to orient the cadets to project management and the writing of a proposal.

INTRODUCTION

REVIEW

Nil.

OBJECTIVES

By the end of this lesson the cadet shall be expected to create a proposal.

IMPORTANCE

It is important for cadets to create a proposal as it is an important step in the achievement of a project. A well thought out proposal allows people to get a better understanding of the project's workload, the necessary requirements for the project and if the project is feasible in the first place.

Teaching Point 1**Define project management.**

Time: 5 min

Method: Interactive Lecture

PROJECT

A project always has the following components:

Specific outcomes. Product or result.

Defined start and end date. Projects do not go on forever. Projects are temporary and are created to achieve particular results. When the results are achieved, the project ends.

Established budgets. Required amount of people, funds, facilities, equipment, and information.

Projects vary:

- **Large or small.** Organizing an inter-squadron sports competition is a large project. Organizing a sports event for senior cadets is a small project.
- **Involve a large of limited number of people.** Planning a squadron sports event is a project that involves many people. Reorganizing the furniture in a bedroom is also a project even though it only involves a limited number of people.
- **"Business-related" or personal.** Organizing the squadron's annual Christmas dinner is a business-related project. Having a dinner party for 12 people is a personal project.

PROJECT MANAGEMENT

Project management is the process of guiding a project from its beginning to its end. Project management includes three basic operations:

- planning;
- organizing; and
- controlling.

No matter what size the project, what needs to be performed is the same. Large projects may require more time to prepare than small projects but both still need to be structured.

Every project entails five phases:

1. **Conceive: Coming up with the idea.** This is the stage during which project managers come up with the project idea. It is at this stage that they determine the project's feasibility, its benefits and its limitations. At the end of this stage, project managers submit their project for approval.
2. **Define: Developing a plan.** This is the stage during which a detailed plan is developed.
3. **Start: Forming a team.** It is at this stage that people who need to know about the project are informed of it and are informed of their tasks.
4. **Perform: Doing the work.** This is when the work of the plan is put into action. This is where supervisors collect information (supervise) to identify deviations from the plans in order to apply corrective measures. This ensures that the objectives are attained.
5. **Close: Ending the project.** This is where a meeting is held to recognize achievements and discuss lessons that can be applied to the next project.

For small projects, the entire process can take a few days; larger projects may take many years. No matter how simple or complex the project, the process is the same.

CONFIRMATION OF TEACHING POINT 1

QUESTIONS:

- Q1. What are the five phases of a project?
 Q2. What is project management?
 Q3. In what stage is the proposal developed?

ANTICIPATED ANSWERS:

- A1. The five phases of a project are:
- Conceive: Coming up with the idea.
 - Define: Developing a plan.
 - Start: Forming a team.
 - Perform: Doing the work.
 - Close: Ending the project.
- A2. Project management is the process of guiding a project from its beginning to its end.
 A3. The proposal is developed during the first stage, which is the conceiving stage.

Teaching Point 2

Explain the conceiving phase of a project.

Time: 10 min

Method: Interactive Lecture

All projects begin with an idea. Sometimes the organization has specific requirement for a project; sometimes there is more freedom in the choice.

CHOOSING A PROJECT

A project organized within the Canadian Cadet Organizations (CCO) should be in-line with its aim.



Ask the cadets to list the aim of the CCO.

The aim of the CCO is to:

1. Develop in youth the attributes of good citizenship and leadership.
2. Promote physical fitness.
3. Stimulate the interest of youth in the sea, land and air activities of the Canadian Forces.

Cadets may be asked to participate in the organization of an exercise.


Here are examples of exercises that cadets may choose to organize:

- community service,
- leadership,
- healthy living,
- fitness and sports,
- marksmanship,
- drill,
- CF familiarization,
- aviation,
- aviation technology,
- aerospace, or
- survival.

CHOOSING AN ACTIVITY OR ACTIVITIES

When the exercise is chosen, activities that relate to the exercise have to be generated. According to CATO 11-03, *Cadet Program Mandate*, the vision of the Cadet Program (CP) is "a relevant, credible, and proactive youth development organization, offering the program of choice for Canada's youth, preparing them to become better leaders of tomorrow through a set of fun, challenging, well-organized and safe activities." That vision should be kept in mind when determining activities for a cadet exercise.

A good method to generate ideas is brainstorming.



Ask the cadets to list some guidelines on how to carry out a brainstorming activity.

Here are some guidelines:

- Write everything that comes to mind.
- Critique is prohibited: all ideas are welcomed.
- Use others ideas to generate new ideas.
- Produce a maximum of ideas.

For example, if cadets choose a fitness and sports exercise, they may brainstorm activities, such as:

- a race,
- a swim session,
- a karate session,
- a downhill skiing day,
- a boxing training session, and
- a tabloid event.

Before making a final decision, it is important to consider a few factors:

- the activity's or activities' goals, and
- the limitations that may stop the exercise from happening.



The age of participants should also be taken into consideration. What may be fun for first year cadets may not be as fun for third year cadets.

DETERMINING THE ACTIVITY'S OR ACTIVITIES' GOALS

Each activity that is part of the exercise has to have a specific goal. The goal of each activity should meet the CCO's aim.

Goals should be specific, measurable, achievable, relevant, and timed. Having clear expectations makes it easier to ensure the project maintains the right direction.



Ask the cadets to explain the concept of making goals SMART.

- **Specific.** The aim of the goal must be defined and everyone involved must be aware of it.
- **Measurable.** A standard to assess achievement must be identified.
- **Achievable.** The goal must be realistic and all required resources must be accessible to accomplish it.
- **Relevant.** The goal must be worthwhile for the people involved
- **Timed.** The goal must be able to be completed within the given time.

DETERMINING LIMITATIONS

At this stage, project managers have to determine the limitations that may put a stop to their project.

Such limitations may include:

- policies, and
- resources, such as:
 - schedule / time,
 - personnel,
 - transportation,
 - finance, and
 - equipment.

CONFIRMATION OF TEACHING POINT 2

QUESTIONS:

- Q1. What is the aim of the CCO? Why is it important to know it?
- Q2. What is a method of generating ideas for activities?
- Q3. What are some limitations that may put a stop to a project?

ANTICIPATED ANSWERS:

- A1. The aim of the CCO is to :
- Develop in youth the attributes of good citizenship and leadership.
 - Promote physical fitness.
 - Stimulate the interest of youth in the sea, land and air activities of the Canadian Forces.

It is important to know the aim of the CCO because a project organized within the Canadian Cadet Organizations (CCO) should be in-line with its aim.

- A2. Brainstorming is a method of generating ideas for activities.

- A3. Limitations that may put a stop to a project include:

- policies, and
- resources, such as:
 - schedule / time,
 - personnel,
 - transportation,
 - finance, and
 - equipment.

Teaching Point 3

Explain the parameters of cadet activities with reference to policies.

Time: 5 min

Method: Interactive Lecture

A policy is a course or a principle of action created to guide leaders and to provide them with parameters for carrying out cadet activities. There are many policies and safety procedures to ensure cadets are participating in fun and challenging training safely. Those policies and procedures have to be taken into account when an exercise is being organized.

CADET ADMINISTRATIVE TRAINING ORDERS (CATOs)

CATOs contain a list of policies that apply to the administration and training of cadets across the country. Some policies restrict some activities and give guidance on others. For example, CATO 13-12, *Supervision of Cadets* describes the requirements for the number of instructors needed for each type of activity that may be carried out to ensure proper supervision.

WATER SAFETY ORDERS



Distribute the table of contents of A-CR-CCP-030/PT-001, *Water Safety Orders* to each cadet.

Water Safety Orders is a document that gives guidance on the organization of on-the-water (OTW) activities.

The document contains information on:

- water safety orders,
- powerboat safety orders,
- rowing safety orders,
- sailing safety orders,
- canoe / kayak safety orders,
- swimming safety orders, and
- scuba diving.

The information refers to floatation, the number of staff per cadet, wind, weather, equipment, clothing, night operation, wearing of shoes, capsizing drills, etc.



Other documents exist to guide leaders when planning various activities. They include:

The DND/CF *General Safety Guide for the Cadet Program* has been produced to assist leaders in the fulfillment of their safety leadership responsibilities. It can be found online at <http://www.cadets.ca/content-contenu.aspx?id=64062>

The A-GA-135-001/AA-001 *Flight Safety for the Canadian Forces* is an A–Z guide useable by companies, militaries, as well as countries, to start and run a flight safety program. It can be found online in the search section of www.airforce.forces.gc.ca

The A-CR-CCP-177/PT-001, *Cadet Marksmanship Program Reference Manual* contains guidance on the organization of marksmanship activities.

Some regions or detachments may have additional orders which amplify or clarify directives found in national documents.

CONFIRMATION OF TEACHING POINT 3

QUESTIONS:

- Q1. Which documents contain a list of national policies that apply to the administration and training of cadets across the country?
- Q2. What document must be used when organizing an activity on the water?
- Q3. What type of information can be found in this document?

ANTICIPATED ANSWERS:

- A1. CATOs.
- A2. Water Safety Orders should be used when planning OTW activities.
- A3. Information on the activities and the various safety procedures to be followed can be found in those documents.

Teaching Point 4

Explain how to write a proposal.

Time: 5 min

Method: Interactive Lecture

A proposal should tell how, when, by whom, and for how much. It needs to contain enough information for the supervisor to either accept or refuse the project.

By writing a proposal, it becomes clear to supervisors what the project will produce and the resources needed to carry it out.



Distribute the Create a Proposal worksheet to the cadets.

The proposal should include the following information:

- project title (type of exercise),
- activities selected,
- objective(s) of each activity, and
- limitations, such as:
 - policies,
 - schedule / time,
 - personnel,
 - finance, and
 - equipment.



Distribute the Create a Proposal Aide-Mémoire to the cadets.

Once the proposal is complete, it is submitted to the appropriate authority for approval.

CONFIRMATION OF TEACHING POINT 4**QUESTIONS:**

- Q1. What information should be included in a proposal?
- Q2. What are examples of limitations?
- Q3. What needs to be done when the proposal is complete?

ANTICIPATED ANSWERS:

- A1. A proposal should include the following information:
- project title (type of exercise),
 - activities selected,
 - objective(s) of each activity, and
 - limitations.
- A2. Some examples of limitations include:
- policies,
 - schedule / time,
 - personnel,
 - finance, and
 - equipment.
- A3. Once the proposal is complete, it is submitted to the appropriate authority for approval.

END OF LESSON CONFIRMATION

The cadets' creation of a proposal will serve as the confirmation of this lesson.

CONCLUSION

HOMEWORK / READING / PRACTICE

Nil.

METHOD OF EVALUATION

This EO is evaluated IAW A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 3, Annex B, 503 PC.

CLOSING STATEMENT

Creating a proposal is an important step to making a project happen. The more thought put into the proposal, the more defined your ideas are, the easier the rest of the stages of the project should be. Creating a proposal clarifies the scope of the project and how much of a commitment is needed to make it happen.

INSTRUCTOR NOTES / REMARKS

Cadets will be given the opportunity to create a proposal, as a member of a group, as part of their OJT.

REFERENCES

A0-003 Director Cadets. (2006). *Cadet administrative and training orders index*. Retrieved May 25, 2006, from <http://www.cadets.ca/support/cato-oaic/intro.aspx>

A0-107 Director Cadets. (2007). CATO 14-31, *Director Cadets and Junior Canadian Rangers General Safety Program*. Ottawa, ON: Department of National Defence.

A1-010 A-CR-CCP-030/PT-001 Director Cadets 4. (2008). *Water safety orders*. Ottawa, ON: Department of National Defence.

C0-249 (ISBN 0-7894-2890-3) Heller, R. (1998). *How to Delegate*. New York, NY: DK Publishing, Inc.

C0-272 Coleridge Education, College of St. Mark and St. John. (2002). *A Consultation of Supervision Provision and Training Requirements Across Connexions Partnerships in England*. Retrieved March 17, 2008 from <http://www.connexions.gov.uk/partnerships/publications/uploads/cp/Supervisory%20Skills%20Exec%20Sum.pdf>

C0-273 (ISBN 978-1-56414-363-1) Ladew, D. P. (1998). *How to Supervise People: Techniques for Getting Results Through Others*. Franklin Lakes, NJ: Career Press.

C0-274 (ISBN 1-4134-1294-7) Sargent, G. (2003). *The Little Black Book of Supervision*. USA: Xlibris Corporation.

C0-452 Universite de Montréal. (2009). *Le remue-méninges*. Retrieved October 29, 2009, from http://www.ebsi.umontreal.ca/jetrouve/projet/etape1/brain_1.htm

C3-252 ISBN 978-0-470-04923-5 Portny, S. E. (2007). *Project management for dummies*. Hoboken, NJ: Wiley Publishing.

CREATE A PROPOSAL

Group members: _____

Date: _____

PROJECT:			
Selected Activities	Objectives	Limitations (Resources Required)	Others (Specify)

Approximate time needed for planning and preparation: _____

THIS PAGE INTENTIONALLY LEFT BLANK

Create a Proposal Aide-Mémoire

Steps to follow to create a proposal

1. Choose the project.
2. Choose the activity or activities.
3. Determine the goal of each activity.
4. Determine the limitations of each activity.

Questions to help you create a proposal and make a plan

Here is a list of questions to keep in mind when planning an activity. Some apply to the proposal planning stage and some need to be taken into consideration later in the process. Either way, it is good to be aware of these questions throughout the entire process.

- Are there policies that apply to this activity (eg, supervision)?
- Are there specific safety procedures to follow?
 - fire regulations,
 - medical / emergency situations,
 - weather,
 - equipment, and
 - specialist instructor.
- What are the requirements (if applicable) for:
 - transportation,
 - facilities,
 - supervision,
 - equipment,
 - food and water,
 - time,
 - specialist instructors, and
 - hygiene maintenance?
- What are the costs associated with the activity?
- Is there the potential for a Plan B (eg, bad weather, insufficient number of instructors)?
- Are there particular requirements for the cadets:
 - for dress / clothing,
 - to bringing lunch, and
 - to have a specific level of fitness, knowledge, or ability?

THIS PAGE INTENTIONALLY LEFT BLANK



**COMMON TRAINING
PROFICIENCY LEVEL FIVE
INSTRUCTIONAL GUIDE**



SECTION 2

EO M503.02 – PREPARE AN EXERCISE

Total Time:

60 min

PREPARATION

PRE-LESSON INSTRUCTIONS

Resources needed for the delivery of this lesson are listed in the lesson specification located in A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 4. Specific uses for said resources are identified throughout the instructional guide within the TP for which they are required.

Review the lesson content and become familiar with the material prior to delivering the lesson.

Make OHPs of Figures A-1 and A-2 located at Attachment A.

Photocopy Exercise Plan Example located at Attachment B for each cadet.

Photocopy Exercise Plan Template located at Attachment C for each cadet.

Photocopy the Guided Discussion Worksheet located at Attachment D.

PRE-LESSON ASSIGNMENT

Have the cadets bring their Aide-Mémoire of EO M503.01 (Create a Proposal) to the class.

APPROACH

An interactive lecture was chosen for TPs 1, 2 and 4 to orient the cadets to the planning and preparation of an exercise.

An in-class activity was chosen for TP 3 as it is an interactive way to provoke thought and stimulate interest about plan format.

A guided discussion was chosen for TP 5 as it allows the cadets to discuss sustaining motivation during a project by sharing opinions, knowledge and experience with the group. The instructor, through a series of guided and follow-up questions, is able to stimulate the cadet's interest in sustaining motivation during an activity. The guided discussion contributes to the cadets' listening skills and team development.

INTRODUCTION

REVIEW

QUESTIONS:

- Q1. What is project management?
- Q2. What are the three basic operations included in project management?
- Q3. What are the five phases of project management?

ANTICIPATED ANSWERS:

- A1. Project management is the process of guiding a project from its beginning to its end.
- A2. Project management includes three basic operations:
- planning;
 - organizing; and
 - controlling.
- A3. The five phases of a project are:
- conceive: coming up with the idea;
 - define: developing a plan;
 - start: forming a team;
 - perform: doing the work; and
 - close: ending the project.

OBJECTIVES

By the end of this lesson the cadet shall be expected to prepare an exercise.

IMPORTANCE

It is important for cadets to know how to prepare an exercise, as it is not only a transferable skill, but it also gives them the tool to take initiative in organizing various events that will benefit cadets in their squadron.

Teaching Point 1**Explain the concept of a project audience.**

Time: 5 min

Method: Interactive Lecture

A project audience is any person or group that supports, is affected by, or is interested in a project. A project audience can be inside or outside the organization.

Knowing your project's audience helps you to:

- plan whether, when and how to involve them; and
 - determine whether the scope of the project is bigger or smaller than you originally had thought.
-

ACTIVITY

Time: 4 min

OBJECTIVE

The objective of this activity is to have the cadets see the scope a project audience can take.

RESOURCES

- Paper, and
- Pen / Pencil.

ACTIVITY LAYOUT

Nil.

ACTIVITY INSTRUCTIONS

1. Have cadets take out a piece of paper and a pen / pencil.
2. Inform the cadets that you will read a question to which they will have two minutes to write as many answers as possible.
3. Read the following question: "The senior cadets from this squadron have decided to organize a sports competition between this squadron and two other squadrons in the area. They are hoping to hold the competition three months from now in a local school gym. The competition will start at 0800 hrs and end at 1600 hrs and lunch will be provided to the entire group (estimation 100 cadets). Who needs to be contacted or informed for this event to happen?"
4. Allow two minutes for cadets to write their answers.
5. Alternating, have each cadet share one answer from their list and why they believe that those people should be involved in or informed of the project.
6. Answers may include:
 - cadets from all squadrons,
 - officers from all squadrons,
 - parents from all squadrons,
 - squadron parents committee from all squadrons,

- school authorities,
- equipment related personnel (supply officer or equipment rental agency),
- restaurant personnel (if planning on ordering food for the group),
- cleaners, and
- cadet detachment.



The list is not exhaustive. Cadets may have provided other answers that are correct. If they can correctly justify why certain people are involved, then their answer should be accepted as correct.

SAFETY

Nil.

CONFIRMATION OF TEACHING POINT 1

The cadets' participation in the activity will serve as the confirmation of this TP.

Teaching Point 2

Explain defining the plan.

Time: 25 min

Method: Interactive Lecture

There are many steps that need to be taken when defining a plan. They are as follows:

1. developing a work-breakdown structure (WBS);
2. determining precedence;
3. developing a schedule;
4. determining team members' skills and knowledge;
5. defining team members' roles and responsibilities;
6. determining and planning non-personnel resources;
7. identifying risk;
8. preparing a tracking system; and
9. confirming team members' participation.

DEVELOPING A WORK BREAKDOWN STRUCTURE (WBS)

Psychologists say human brains can normally comprehend 7–9 items simultaneously. For that reason, a project with dozens or even thousands of tasks may often be overwhelming. Project managers can deal with such projects by organizing the numerous tasks into phases to make them more manageable.

The most important guideline when preparing an exercise is thinking in detail. Project managers often underestimate the time and resources they need because they do not recognize everything they have to do to complete their tasks.

The WBS is a representation of all the tasks that have to be completed. The WBS allows leaders to see all tasks in an organized manner.

Those representations may take various forms. They are often displayed in the form of a hierarchical tree, but they can also be in the form of a tabular list.

As examples, Figure 1 shows a WBS for a hypothetical banquet and Figure 2 shows a WBS for a report preparation.



Show the cadets the slide of Figure A-1 located at Attachment A.



Show the cadets the slide of Figure A-2 located at Attachment A.

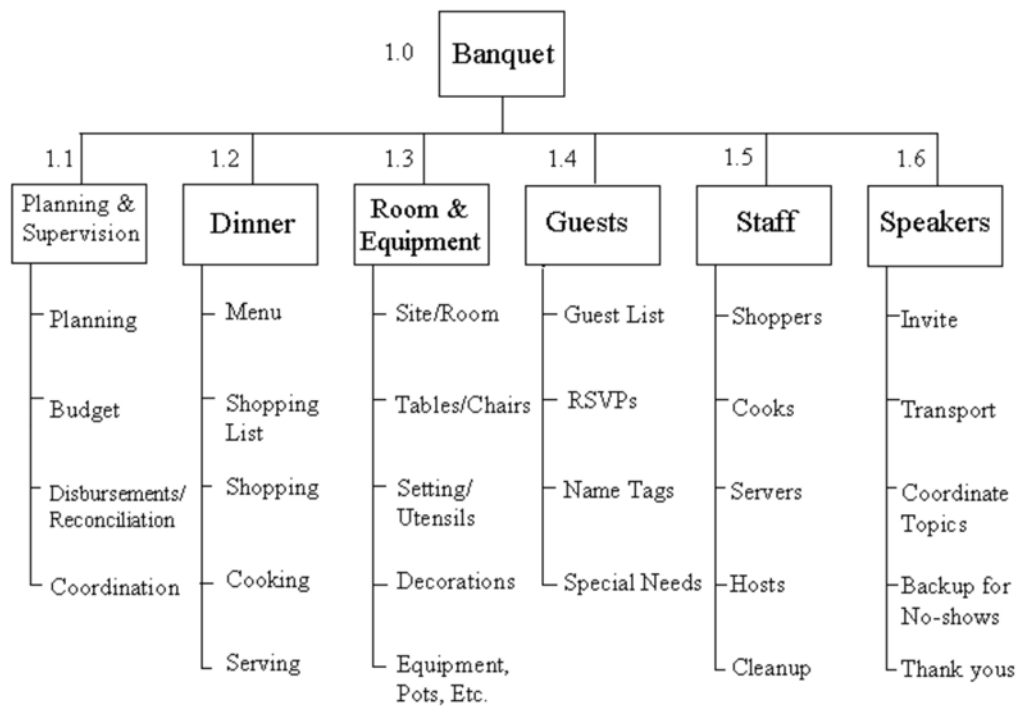


Figure 1 Banquet WBS

Note. From "Principle Based Project Management", 2007, *Work Breakdown Structure (WBS)*. Retrieved October 16, 2008, from http://www.hyperhot.com/pm_wbs.htm

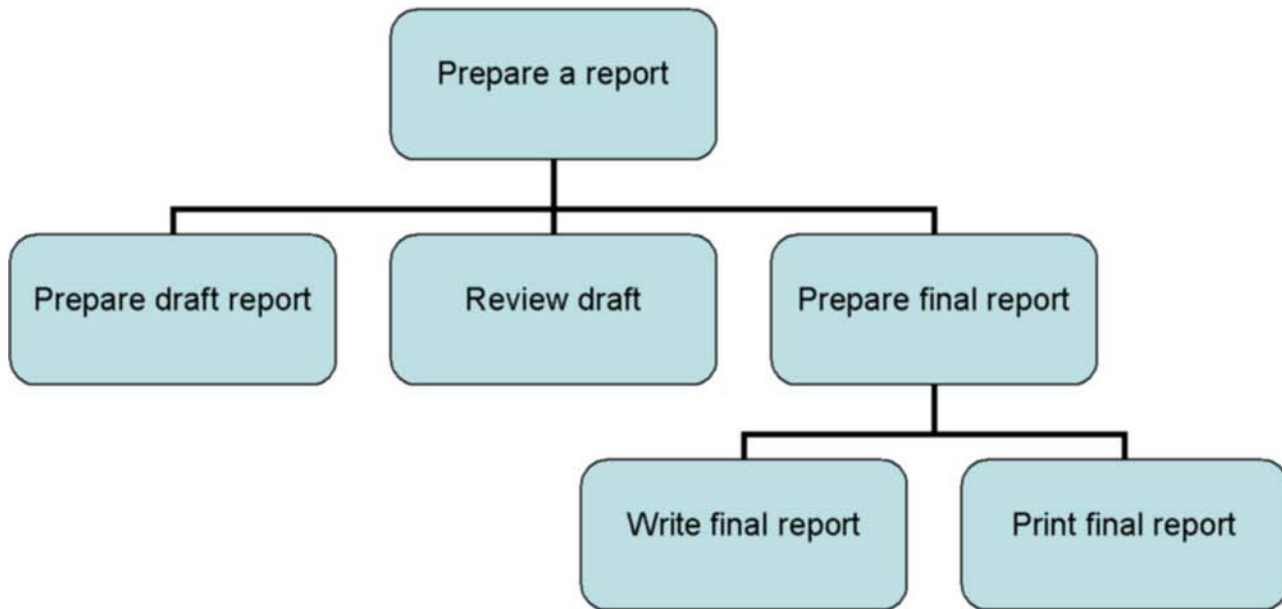


Figure 2 Report Preparation WBS

Note. From *Project Management for Dummies* (p.76), by S. E. Portny, 2007, Hoboken, NJ: Wiley Publishing.

Here is how to develop a WBS:

1. Brainstorm all the necessary tasks for the exercise.
2. Group the tasks into a few major categories with common characteristics.
3. Within each category, group together the tasks that have the same characteristics.

To determine if the work has been broken into small enough pieces, answer these questions:

- Can the resources needed for the exercise be accurately estimated (personnel, equipment, raw materials, money, facilities, information, etc.)?
- Can the time requirements for each activity be accurately estimated?
- If some tasks were to be assigned to a stranger, would that person have sufficient detail to understand exactly what to do?



Here are some tips to improve the quality of the WBS:

- Involve the people who will be doing the work.
- Review information from previous similar projects.
- Make assumptions when there is uncertainty about a certain activity. Do not forget to update the WBS (or the plan) when that uncertainty is clarified.

The WBS does not take into consideration the chronological order in which each event should be done.

At this stage, it can be beneficial to identify obstacles that may be encountered throughout the project, in order to generate some contingency plan ideas.

DETERMINING PRECEDENCE

Once all the tasks have been outlined, it has to be determined in which order they have to be completed. Also, it has to be determined which events do not depend on others because they may be able to get accomplished concurrently with other tasks.

DEVELOPING A SCHEDULE

Once the precedence of tasks has been determined, the duration of each task has to be estimated. This step allows leaders to visualize how much time is needed prior to the conduct of the exercise, during the exercise and after the exercise.

The information could be displayed as follows:

	Activity	Required Time	Comments
1			
2			
3			
4			
5			
6			

Note. Created by Director Cadets 3, 2010, Ottawa, ON: Department of National Defence.

DETERMINING TEAM MEMBERS' SKILLS AND KNOWLEDGE

To accomplish the most with a minimum of time and resources, each task must be done in the correct order and each person must work at peak efficiency.

To ensure this happens, leaders should:

- determine which skills and knowledge they require to get the tasks done; and
- determine who is available and what skills they have to offer.

DEFINING TEAM MEMBERS' ROLES AND RESPONSIBILITIES

A leader may assign tasks for various reasons, such as:

- the assigned person is the most qualified or efficient at that task;
- the assigned person needs further practice at that task; or
- the assigned person has expressed an interest for that task.

No matter how the task is assigned, a leader's main focus should be to ensure the project is going to move along smoothly. If someone has been assigned a task in which they have little experience, then a leader should ensure the person receives sufficient support in accomplishing that task.

A leader may be able to delegate but that doesn't mean they have nothing to do with the task anymore. A leader may transfer the decision-making power to someone else, but they still need to ensure that the desired results are achieved.

Delegating is important for three reasons:

- to allow the leader to do other tasks;
- to have the most qualified person make decisions; and
- to develop subordinates' ability to handle additional assignments prudently and successfully.



Leaders should never assign other people tasks that they cannot clearly define themselves.

DETERMINING AND PLANNING NON-PERSONNEL RESOURCES

To determine and plan non-personnel resources, a leader should:

- look at every task outlined in the WBS and determine the requirements for each task; and
- determine how those requirements are going to be met.

IDENTIFYING RISK

The first step toward controlling risks is identifying them. Not all risks cause the same degree of concerns. Risk has to be managed throughout the duration of the project, from its beginning to its end.

Here is a list of possible risk factors that may arise during a project:

- insufficient time to prepare,
- missing parts to the plan (eg, wet weather plan),
- replacement of team member / leader, and
- a supporting activity (i.e. meals or transportation) has no assigned leader.

Leaders have to be aware of what may happen. In some cases, the risks are such that they create a requirement for a contingency plan (also referred to as Plan B).

PREPARING A TRACKING SYSTEM

Before the project starts, the desired results and the measures taken to ensure the desired results are achieved, have to be determined. Throughout the duration of the project, leaders need to maintain control, to ensure work is getting done. Monitoring performance makes it easier to detect problems.

Leaders should follow these procedures throughout a project's life:

- At the start of a project, reconfirm with people their commitments.
- At the start of a project, ensure people understand what is expected of them.
- Have people keep track of the work they perform.
- At agreed-upon intervals during the project, confirm with people the work they have completed.
- At intervals during the project, compare actual performance with planned performance, identify any problems, formulate, take corrective actions, and keep people informed.

CONFIRMING TEAM MEMBERS' PARTICIPATION

Starting a project off correctly is the key to ultimate success. As a project is about to start, here are things that should be done:

- Inform the people that the project is going to go ahead, that the plan is finalized.
- Confirm they are still available to support the project.
- Reconfirm the work expect from them.
- Advise them of the pre-exercise meeting. They should get a copy of the plan for review before the meeting. This will be when everyone becomes aware of what everyone's tasks are and that clarifications from the plan are made.



At this point, it is also important to start the groundwork for the post-project evaluation. Here are some guidelines to follow:

- Inform the team that there will be a post-exercise meeting at the end of the project.
- Encourage team members to record their problems, challenges, ideas and suggestions throughout the project.
- Clarify the criteria that define your project's success by reviewing the latest version of the project's objectives with team members.
- Maintain a own project log (project issues and occurrences) and encourage team members to do the same.



Before the pre-exercise meeting, leaders should meet with their supervisors to have the plan reviewed and approved. Leaders should be open minded to supervisors' feedback.

CONFIRMATION OF TEACHING POINT 2

QUESTIONS:

- Q1. What are the steps to defining a plan?
- Q2. What is a WBS?
- Q3. What are some procedures that can be followed to ensure the work is getting done?

ANTICIPATED ANSWERS:

- A1. The steps to defining a plan are:
1. developing a WBS;
 2. determining precedence;
 3. developing a schedule;
 4. determining team members' skills and knowledge;
 5. defining team members' roles and responsibilities;

6. determining and planning non-personnel resources;
 7. identifying risk;
 8. preparing a tracking system; and
 9. confirming team members' participation.
- A2. The WBS is a representation of all the tasks that have to be done. The WBS allows leaders to see all tasks in an organized manner.
- A3. Some procedures that can be followed to ensure the work is getting done are:
- At the start of a project, reconfirm with people their commitments.
 - At the start of a project, ensure people understand what is expected of them.
 - Have people keep track of the work they perform.
 - At agreed-upon intervals during the project, confirm with people the work they have completed.
 - At intervals during the project, compare actual performance with planned performance, identify any problems, formulate, take corrective actions, and keep people informed.

Teaching Point 3**Have the cadets create an exercise plan template.**

Time: 20 min

Method: In-Class Activity

ACTIVITY**OBJECTIVE**

The objective of this activity is to have the cadets create an exercise plan template.

RESOURCES

- Exercise Plan Example located at Attachment B,
- Exercise Plan Template located at Attachment C,
- Paper,
- Pen / Pencil,
- Flip Chart paper, and
- Markers.

ACTIVITY LAYOUT

Nil.

ACTIVITY INSTRUCTIONS

1. Divide the cadets in groups of no more than three.
2. Distribute paper, pen / pencil, flip chart paper and markers to each group.

- Tell the cadets they have to create a plan template that included all the information to be included in a plan. It has to be a template they could use.



Encourage the cadets to use their Create a Proposal Aide-Mémoire (EO M503.01 Create a Proposal), as it contains information that may help.

- Allow the cadets 10 minutes to work in groups.
- Allow a total of five minutes for all the groups to present their final work to the class.
- Distribute the Exercise Plan Example located at Attachment B and the Exercise Plan Template located at Attachment C and discuss elements that differ from the ones they have created.

SAFETY

Nil.

CONFIRMATION OF TEACHING POINT 3

The cadets' participation in the activity will serve as the confirmation of this TP.

Teaching Point 4

Time: 20 min

Explain starting the team.

Method: Interactive Lecture

It is important for people (especially cadets) to be informed at the appropriate time.



Review the concept of project audience.

Ask the cadets if they believe everyone in the project audience needs to be informed at the same time. Why or why not?

ANNOUNCING THE EXERCISE

The people affected by the exercise need to be informed at various times depending on the tasks or impact they have on the exercise.

Before announcing an exercise to cadets, leaders need to ask themselves if the time is appropriate to make an announcement. They can ask themselves questions, such as "Are we ready to make this announcement?" or, "Is this going to allow sufficient time for the cadets to prepare for the exercise?"

There are many ways to announce the exercise to the cadets, such as:

- email,
- a written announcement in the squadron's newsletter or monthly schedule,
- a verbal announcement at the end of a training session, or
- a formal meeting.

PLANNING A SUCCESSFUL PRE-EXERCISE MEETING

The information in a pre-exercise meeting must include:

- what has to be done;
- when it has to be done;
- how it has to be done;
- by whom it has to be done; and
- available resources.

To have a good meeting, there needs to be some preplanning. Here are some pointers:

Decide who needs to attend and why. People who have necessary information or the authority to make specific decisions should be in attendance.

Give plenty of notice of the meeting. This increases the chances that the people you want to attend will be available.

Let the people who should attend the meeting know its purpose. People are most likely to attend a meeting if they understand why their attendance is important.

Prepare a written agenda that includes topics and their allotted times. This document helps people see why attending the meeting is in their interests. It is also the guide to running the meeting.

Circulate the agenda and any necessary material (eg, plan) in advance. This gives everyone time to suggest changes to the agenda and to plan for the meeting.

Keep meetings to an hour or less. People can be forced to sit in a room for hours, but they cannot be forced to keep their minds on the activities and information. If necessary, several meetings of one hour or less to discuss complex issues or multiple topics can be scheduled.

Here are essentials for conducting a productive meeting:

Start on time, even if people are absent. When people see that a leader waits for latecomers, they have a tendency to show up late! When people see a leader that starts on time, they show up on time!

Assign a timekeeper. This person reminds the group when a topic has exceeded its allocated time.

Take detailed notes (minutes) of who attended, the items discussed, and the decisions and assignments the group made. This procedure allows people to review and clarify the information and serves as a reminder of actions to be taken after the meeting.

Keep a list of items that need further action (action list), and assign one person to be responsible for each item. This step helps ensure that when discussing these issues again, the right information and responsible people are present.

If you do not have the right information or the right people to resolve an issue, stop the discussion and put it on the action list. Discussing an item without having the necessary information or the right people present is just wasted time.

End on time. Meeting attendees may have other commitments that begin when the meeting is supposed to end. Not ending on time causes people to be late for their next commitments or to leave the meeting before it is over.

When a project runs over a long period of time, regularly scheduled meetings give members an opportunity to share progress and issues. Consulting with team members to develop a meeting schedule is a way to ensure meeting times are convenient for as many people as possible. For those meetings, it may be beneficial to create a progress report to give everyone a brief overview of how the project is coming together. That should be distributed beforehand with any other background information related to the topics on the agenda.

CONFIRMATION OF TEACHING POINT 4

QUESTIONS:

- Q1. What are some ways to announce an exercise?
- Q2. What information must be included a pre-exercise meeting?
- Q3. What is a meeting agenda? Why is it important?

ANTICIPATED ANSWERS:

- A1. There are many ways to announce an exercise, such as:
- email,
 - written announcement in the squadron's newsletter or monthly schedule,
 - verbal announcement at the end of a training session, or
 - formal meeting.
- A2. The information in a pre-exercise meeting must include:
- what has to be done;
 - when it has to be done;
 - how it has to be done;
 - by whom it has to be done; and
 - available resources.
- A3. A written agenda is a guide for running the meeting. It is important because it helps people see why attending the meeting is in their interests. Circulating it in advance gives everyone time to suggest changes to the agenda and to plan for the meeting.

Teaching Point 5

Have the cadets discuss sustaining motivation during a project.

Time: 10 min

Method: Guided Discussion



It is recommended that the facilitator review the instructional guide for EO M403.03 (Motivate Team Members) prior to conducting the guided discussion.

BACKGROUND KNOWLEDGE



The point of the guided discussion is to present the following information to the group using the tips for answering / facilitating discussion and the suggested questions provided.

The guided discussion is an instructional method where new material is presented to the group and specific learning objectives must be achieved. Unlike a group discussion, the group may not have any previous experience, opinion or training on the material.

The guided discussion focuses on the group determining the correct answers to specific questions through discussion as opposed to participating in a discussion to only voice an opinion or share an experience.

Facilitate the guided discussion and have an assistant record observations, comments and answers to focus on the discussion. The notes made by the assistant will then be used during the summary portion of the discussion to ensure that all learning objectives are met.

MOTIVATION

Even though motivation is a personal choice, leaders can create the opportunity for others to become motivated by giving them a sense of:

- desirability: giving value to achieving the goal;
- feasibility: having people believe the project can be done;
- progress: letting people know how they are doing; and
- recognition: recognizing work well done.

Desirability: Why should I want to do this project? How is this project beneficial to me?

When people feel a connection to the project, they are more inclined to work toward its accomplishment.

There are many ways for leaders to develop the notion that a project is personally beneficial. They can get team members to discuss:

- personal interests and goals and relating those to aspects of the project.
- past projects that they enjoyed and why they enjoyed them.
- some of the benefits that they hope to realize by working on the project and the value of those benefits.

Feasibility: Is this project even possible?

What seems impossible to one person can seem feasible to another. If a project does not seem possible, people are not going to give it their full effort.

The assessment of feasibility can become a self-fulfilling prophecy. If people think an assessment is feasible, they will work hard to complete it; if they encounter problems, they will try to work them out. However, if people really believe they have no chance of succeeding, they give up at the first sign of difficulty. Any problems just confirm what they already knew—the project was doomed from the start. Of course, as soon as they give up, they have no chance of succeeding, so their initial belief is that the project wasn't feasible has been confirmed. No matter how desirable people may feel a project is, they will give up more easily when they encounter any difficulties if they are convinced that nothing they do can cause it to succeed. People do not need a guarantee of success, but they must believe they have a chance.

To help people believe a project is feasible, leaders can:

- encourage members to identify potential concerns, so they can be addressed; or
- explain why they feel that targets and plans are feasible.

Progress: How I am doing so far?

People have to know how they are doing over time for various reasons, such as:

- achieving intermediate goals provides them personal satisfaction;
- recognizing their successes confirms they are on the right track; and
- successfully completing intermediate goals reinforces their beliefs that they can accomplish the final goals.



People tend to wait until the last minute when no other motivation comes their way.

To help keep people on track and excited about the project:

- establish meaningful and frequent intermediate goals;
- continually assess how people are doing;
- frequently share information with people about their performance; and
- continually reinforce the project's potential benefits.

Recognition: Am I being appreciated for all the hard work I have been doing?

People like to be recognized when they are working hard. However, leaders should be aware that there are guidelines to follow when formalizing that appreciation.

Rewards can take multiple forms, such as:

- talking with the person and expressing your appreciation;
- expressing appreciation in a written note or email;
- expressing appreciation in writing to the person's supervisor;
- issuing the person a certificate of appreciation; and
- taking the person out to lunch.

To make the rewards most effective:

- be sure that acknowledgment and appreciation is honest and sincere; and
- respect the person's personal style and preferences when giving the reward:
 - Some people enjoy receiving acknowledgments in front of their peers, while others prefer receiving them in private.
 - Some people appreciate receiving an individual award; others appreciate receiving an award presented to the entire team.

GUIDED DISCUSSION



TIPS FOR ANSWERING / FACILITATING DISCUSSION:

- Establish ground rules for discussion, eg, everyone should listen respectfully; don't interrupt; only one person speaks at a time; no one's ideas should be made fun of; you can disagree with ideas but not with the person; try to understand others as much as you hope they understand you; etc.
- Sit the group in a circle, making sure all cadets can be seen by everyone else.
- Ask questions that will provoke thought; in other words avoid questions with yes or no answers.
- Manage time by ensuring the cadets stay on topic.
- Listen and respond in a way that indicates you have heard and understood the cadet. This can be done by paraphrasing their ideas.
- Give the cadets time to respond to your questions.
- Ensure every cadet has an opportunity to participate. One option is to go around the group and have each cadet answer the question with a short answer.
- Additional questions should be prepared ahead of time.



Take time to introduce the material so the group is oriented for the discussion. The introduction can take the form of an introductory statement / paragraph or can be completed with an in-class activity or exercise prior to the guided discussion.

The introduction is only used to orient the group to the material and should not be used to issue control statements or set ground rules.



During the discussion, take notes on the Guided Discussion worksheet located at Attachment D.

INTRODUCTION

The aim of PO 503 is to provide the tools to take a project from its conception to its end, and that means through its execution. Since a project's success depends on the project manager's ability to organize, coordinate, and support a diverse team that is working toward a common goal, this lesson is going to allow discussing the execution of a plan, and specifically how to keep the members motivated throughout the duration of the project.



Develop other questions and answers throughout the guided discussion; however, it is important to use the prepared questions to ensure the learning objectives are met. Develop follow-up questions so knowledge can be confirmed or if time permits, deeper exploration of the topic can occur.



Reinforce those answers given and comments made during the guided discussion, ensuring each learning objective is achieved.

PREPARED QUESTION:

Q1. How is motivation created? Where does motivation come from?

ANTICIPATED ANSWER:

A1. Even though motivation is a personal choice, leaders can create the opportunity for others to become motivated by giving them a sense of:

- desirability: giving value to achieving the goal;
- feasibility: having people believe the project can be done;
- progress: letting people know how they are doing; and
- recognition: recognizing work well done.

Desirability

PREPARED QUESTION:

Q1. How do people react when they work on a project they believe is personally beneficial to them?

ANTICIPATED ANSWER:

A1. When people feel a connection to the project, they are more inclined to work toward its accomplishment.

Follow-Up Question if Required:

Q1. How can people develop the notion that a project is beneficial to them?

Follow-Up Answer if Required:

A1. There are many ways for leaders to develop the notion that a project is personally beneficial. They can get team members to discuss:

- personal interests and goals and relating those to aspects of the project.
- past projects that they enjoyed and why they enjoyed them.
- some of the benefits that they hope to realize by working on the project and the value of those benefits.

Feasibility

PREPARED QUESTIONS:

Q1. Do you believe feasibility is the same for everyone? How does it differ between individuals?

Q2. How does it affect the people's attitude towards a project? How do people react when they work on a project they believe is unfeasible in opposition to a project they believe is feasible?

ANTICIPATED ANSWERS:

- A1. Of course, feasibility is a subjective assessment. What seems impossible to one person can appear feasible to another.
- A2. Assessment of feasibility can become a self-fulfilling prophecy. If people think an assessment is feasible, they will work hard to complete it; if they encounter problems, they will try to work them out. However, if people really believe they have no chance of succeeding, they give up at the first sign of difficulty. Any problems just confirm what they already knew — the project was doomed from the start. Of course, as soon as they give up, they have no chance of succeeding, so their initial belief is that the project wasn't feasible has been confirmed. No matter how desirable people may feel a project is, they will give up more easily when they encounter any difficulties if they are convinced that nothing they do can cause it to succeed. People do not need a guarantee of success, but they must believe they have a chance.

Follow-Up Question if Required:

- Q1. How can people develop the notion that a project is feasible?

Follow-Up Answer if Required:

- A1. People can develop the notion that a project is feasible by:
- identifying potential concerns to the leader and getting them addressed; or
 - having the leader explain why they feel that targets and plans are feasible.

Progress

PREPARED QUESTION:

- Q1. Why should people be informed of how they are progressing?

ANTICIPATED ANSWER:

- A1. People have to know how they are doing over for various reasons, such as:
- achieving intermediate milestones provides personal satisfaction;
 - recognizing their successes confirms they are on the right track; and
 - successfully completing intermediate steps reinforces their beliefs that they can accomplish the final goals.

Follow-Up Questions if Required:

- Q1. How do you feel when someone takes some interest in the work you have done? That such and such an area needs improvement or that you have done a great job so far?
- Q2. Have you ever seen a three-month project where all the major milestones occur in the last 3–4 weeks? When do you think people get serious about the project?
- Q3. How could you have kept those people on track earlier in the process?

Follow-Up Answers if Required:

- A1. Answers will vary.
- A2. People tend to wait until the last minute, when no other motivation comes their way.

- A3. Do the following to help keep people on track and excited about the project:
- establish meaningful and frequent intermediate milestones;
 - continually assess how people are doing;
 - frequently share information with people about their performance; and
 - continually reinforce the project's potential benefits.

Recognition

PREPARED QUESTION:

Q1. What are forms of rewards that you can give people?

ANTICIPATED ANSWER:

- A1. Rewards can take multiple forms, such as:
- talking with the person and expressing your appreciation;
 - expressing appreciation in a written note or email;
 - expressing appreciation in writing to the person's supervisor;
 - issuing the person a certificate of appreciation; and
 - taking the person out to lunch.

Follow-Up Question if Required:

Q1. What are ways to make those rewards most effective?

Follow-Up Answer if Required:

- A1. To make the rewards most effective:
- be sure your acknowledgment and appreciation is honest and sincere.
 - respect the person's personal style and preferences when giving the reward:
 - Some people enjoy receiving acknowledgments in front of their peers, while others prefer receiving them in private.
 - Some people appreciate receiving an individual award; others appreciate receiving an award presented to the entire team.



As a confirmation question, you can ask: "What are ways to encourage motivation?"
Answers should include:

- desirability: giving value to achieving the goal;
- feasibility: having people believe the project can be done;
- progress: letting people know how they are doing; and
- recognition: recognizing work well done.

SUMMARY



The summary is used to cover all comments, answers, and discussion that developed throughout the guided discussion. The summary is not used as a confirmation of the material discussed. Use the notes from the Guided Discussion Worksheet to prepare the summary emphasizing points that support the learning objectives of the guided discussion.



Reinforce those answers given and comments made during the group discussion, ensuring the teaching point has been covered.

CONFIRMATION OF TEACHING POINT 5

The cadets' participation in the guided discussion will serve as the confirmation of this TP.

END OF LESSON CONFIRMATION

The cadets' preparation of an activity will serve as the confirmation of this lesson.

CONCLUSION

HOMEWORK / READING / PRACTICE

Nil.

METHOD OF EVALUATION

This EO is evaluated IAW A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 3, Annex B, 503 PC.

CLOSING STATEMENT

Preparation is the key to success. A well thought plan allows operations to go smoothly. Being able to plan and prepare is a skill that may be used in many life opportunities, and is therefore a very important transferable skill set.

INSTRUCTOR NOTES / REMARKS

Cadets shall be given the opportunity to prepare a cadet exercise, as a member of a group, as part of their OJT.

REFERENCES

A0-200 B-GL-303-002/FP-000 Canadian Forces. (1995). *Operational staff procedures : Staff duties in the field. (Volume 2)*. Ottawa, ON: Department of National Defence.

C0-453 Doc Stoc. (2009). *Format for activity plan*. Retrieved November 1, 2009, from <http://www.docstoc.com/docs/4977554/FORMAT-FOR-ACTIVITY-PLAN>

C3-252 ISBN 978-0-470-04923-5 Portny, S. E. (2007). *Project management for dummies*. Hoboken, NJ: Wiley Publishing.

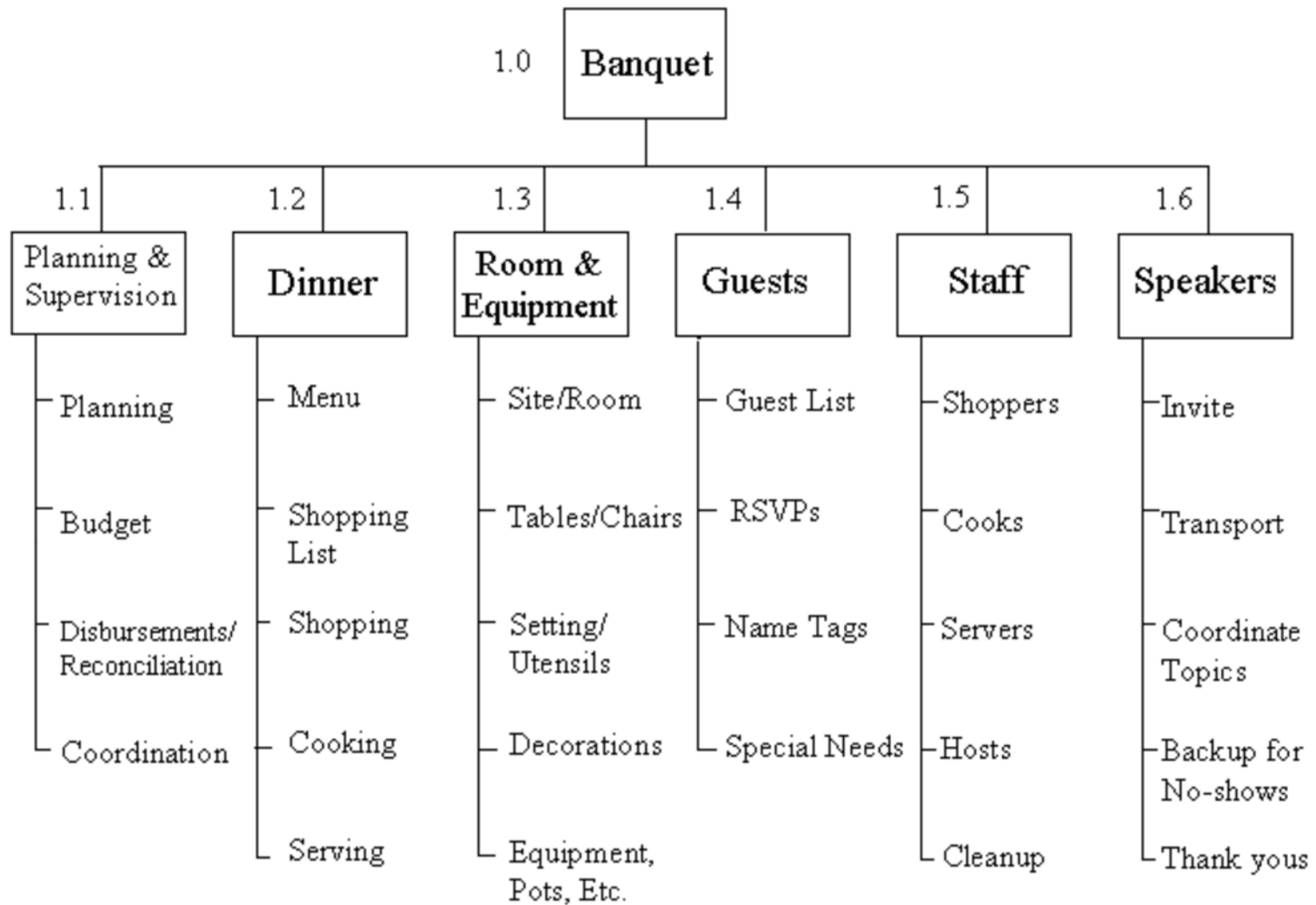


Figure A-1 Banquet WBS

Note. From "Principle Based Project Management", 2007, *Work Breakdown Structure (WBS)*. Retrieved October 16, 2008, from http://www.hyperhot.com/pm_wbs.html

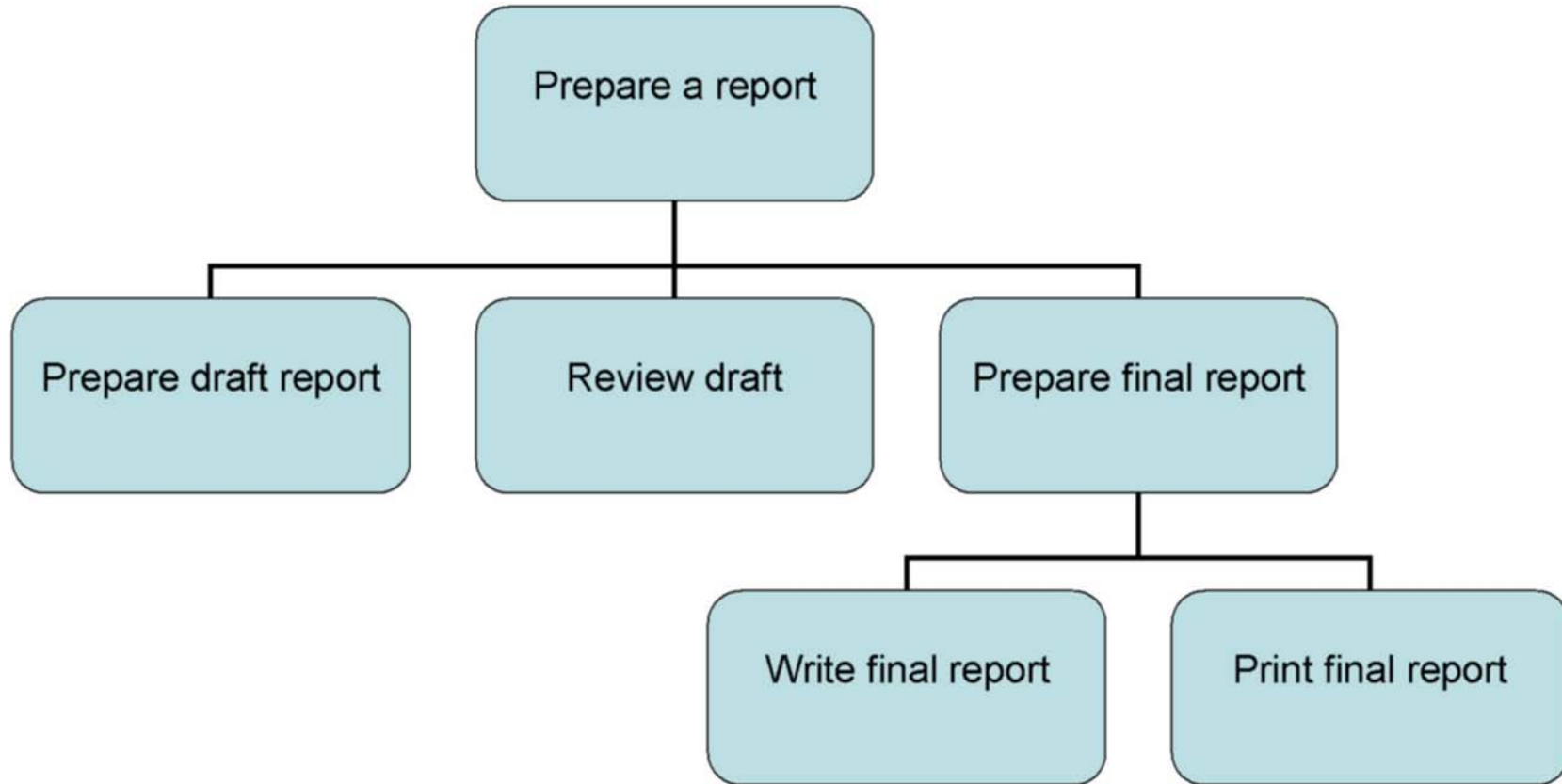


Figure A-2 Report Preparation WBS

Note. From *Project Management for Dummies* (p.76), by S. E. Portny, 2007, Hoboken, NJ: Wiley Publishing.

EXERCISE PLAN EXAMPLE

TITLE OF THE EXERCISE: SPORTS EVENT: OPERATION GET-YOUR-MOVE-ON

WHAT

Who is involved, what is going to happen, where and when?

Example: Unit 123 Moncton will participate in Operation GET-YOUR-MOVE-ON, a sports event to be conducted at the Moncton Everblue High School on 10 Mar 2012 from 0900 hrs–1600 hrs.

WHY

Why is this happening?

Example: Unit 123 Moncton will conduct the sports event to promote physical fitness amongst all cadets, to introduce them to various sports, and to develop leadership and refereeing skills in senior cadets. The event will take place over one day to allow the conduct of multiple sports.

HOW

A. General Outline

What are the main parts of the exercise?

Example: This exercise will be conducted in five phases:

1. Phase One – Administration

The pre-activity meeting will be conducted on 21 Feb 12 in the CO's office at 1730 hrs. All members will attend. Booking of facilities, administrative preparation and planning are being completed by the Training Officer.

2. Phase Two – Preparation of Facilities

Prior to the cadets' arrival, all sergeants are required to prepare the facilities. The equipment for all sports events is to be taken out of the supply room and placed in the appropriate area. Signs identifying bathrooms, water points, and safety points have to be put up. This should be completed NLT 0840 hrs.

3. Phase Three – Conduct of the Exercise

As per schedule. Will include safety briefing, warm-up, conduct of the sports, lunch, cool-down and activity debriefing. Cadets will be allowed to leave at 1600 hrs.

4. Phase Four – Return of Stores

Return of stores, clean-up of facilities.

5. Phase Five - Post-exercise meeting

Post-exercise meeting will be conducted on Monday 11 Mar 2012 at the CO's office from 1700 hrs to 1830 hrs. All senior cadets and officers will attend.

B. Groupings

Are there particular groups you need created?

Example: Cadets will be divided upon arrival into four different sports teams. WO1 Mackey will ensure this is done as soon as cadets are on ground.

C. Tasks

What are the tasks specific to each person?

WHO	TASKS
Capt Malloy	<ul style="list-style-type: none"> • Plan the sports event. • Book school facilities. • Deliver the safety briefing upon arrival. • Deliver the event's debriefing.
Lt Nixon	<ul style="list-style-type: none"> • Responsible for meal arrangements. • Responsible for all medical emergencies. First-aider for the event.
WO1 Mackey	<ul style="list-style-type: none"> • Responsible to ensure that equipment and signs are ready before 0840 hrs as per Annex C. • Responsible to ensure all activities are carried out safely and according to the timetable. • Responsible to have cadets divided into four sports teams.
WO2 Landry	<ul style="list-style-type: none"> • Responsible for the training and evaluation of all activity referees. • Offer feedback to activity referees. • Complete and submit an individual evaluation of all referees to the Training Officer.
FSgt Gagnon	<ul style="list-style-type: none"> • Responsible for the evaluation all activity referees. • Offer feedback to activity referees. • Complete and submit an individual evaluation of all referees to the Training Officer.
Sgt Penny	<ul style="list-style-type: none"> • Responsible for equipment set-up and tear-down • Become familiar with and referee soccer. • Become familiar with and referee volleyball.
Sgt Randell	<ul style="list-style-type: none"> • Responsible for equipment set-up and tear-down. • Become familiar with and referee soccer. • Become familiar with and referee volleyball.
Sgt Picard	<ul style="list-style-type: none"> • Responsible for equipment set-up and tear-down. • Become familiar with and referee ball hockey. • Become familiar with and referee badminton.
Sgt Clark	<ul style="list-style-type: none"> • Responsible for equipment set-up and tear-down. • Become familiar with and referee ball hockey. • Become familiar with and referee badminton.
Sgt Belliveau	<ul style="list-style-type: none"> • Responsible for set-up and tear-down. • Responsible to carry out the warm-up and the cool-down. • Responsible for the tug-of-war event.
All members	<ul style="list-style-type: none"> • All members are to look after safety. • Anything deemed unsafe should be stopped right away and rectified.

D. Timings

What are the timings of this event?

Example: See timetable in Annex A.

E. Dress

What should people wear to the event?

Example: Dress for the event will be suitable sports gear. No outdoor footwear shall be worn inside.

WITH WHAT - RESOURCES

What else do people need to know to put the plan into action?

Example:

Rations

Rations will be arranged by Lt Nixon.

Accommodations

Arrangements for the school are to be made by Capt Malloy.

Equipment

See Annex B for Equipment List.

See Annex C for Activity Layout.

Transport

Cadets are responsible for their own transportation to and from the school.

Emergency Procedures

All medical emergencies will be reported to Lt Nixon. First aid will be available on site, and will be given if necessary. Medical emergencies will be directed to 911.

Water

Water will be available at school fountains. All cadets are to bring a personal water bottle to have water on hand.

Hygiene

The school washrooms (toilets and showers) will be available.

CHAIN OF COMMAND

What is the chain of command in the event? Who is in charge of what?

Example:

Planning: Capt Malloy

Conduct: WO1 Mackey

Evaluation: WO2 Landry, FSgt Gagnon

Rations: Lt Nixon

First-Aider: Lt Nixon

Referees: Sgt Penny, Sgt Randell, Sgt Picard, Sgt Clark and Sgt Belliveau

Capt R. Malloy

TrgO

123 Moncton

Distribution List

Who needs to know about this plan?

Example:

CO

DCO

Capt Malloy

Lt Nixon

WO1 Mackey

WO2 Landry

FSgt Gagnon

Sgt Penny

Sgt Randell

Sgt Picard

Sgt Clark

Sgt Belliveau

List of Annexes

What annexes does your plan require?

Example:

Annex A - Timetable

Annex B - Equipment

Annex C - Exercise Layout

Annex A

TIMETABLE

Period	Time	What	Who	Comments
1	0810–0840 hrs	Set-up	All Sergeants	
2	0840–0900 hrs	Cadets arrival	All senior cdts	
3	0900–0910 hrs	Attendance		
4	0910–0920 hrs	Safety briefing	Capt Malloy	WO1 to divide teams at this time.
5	0920–0930 hrs	Warm up	Sgt Belliveau	
6	0940–1010 hrs	Game 1	Sgt Randell Sgt Penny	Soccer (Teams 1 vs 2) Volleyball (Teams 3 vs 4)
7	1010–1030 hrs	Break		
8	1030–1100 hrs	Game 2	Sgt Penny Sgt Randell	Soccer (Teams 1 vs 3) Volleyball (Teams 2 vs 4)
9	1100–1120 hrs	Break		
10	1120–1200 hrs	Game 3	TBD*	Soccer (Teams 3 vs 4) Volleyball (Teams 1 vs 2)
11	1200–1300 hrs	Lunch		
12	1300–1330 hrs	Game 4	Sgt Picard Sgt Clark	Hockey (Teams 1 vs 2) Badminton (Teams 3 and 4)
13	1330–1350 hrs	Break		
14	1350–1420 hrs	Game 5	Sgt Clark Sgt Picard	Hockey (Teams 3 vs 4) Badminton (Teams 1 and 2)
15	1420–1440 hrs	Break		
16	1440–1510 hrs	Game 6	TBD*	Hockey (Teams 1 vs 4) Badminton (Teams 2 and 3)
17	1510–1535 hrs	Tug of war	Sgt Belliveau	
18	1535–1545 hrs	Cool down	Sgt Belliveau	
19	1545–1600 hrs	Debriefing	Capt Malloy	
20	1600 hrs	Departure	All senior cdts	

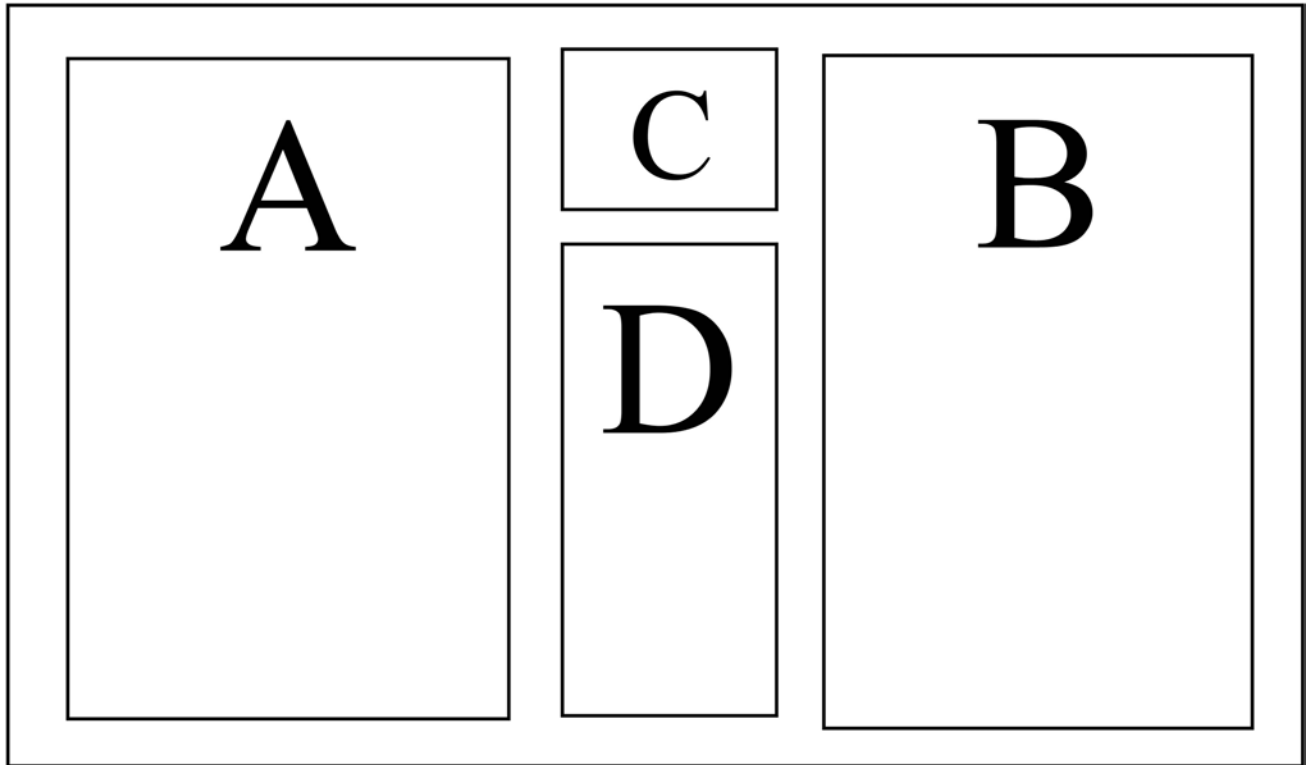
* Based on previous experience of both sports, determine who may need more practice and assign as appropriate.

Annex B

EQUIPMENT LIST

- Hockey sticks x 20
- Hockey masks x 20
- Hockey gloves x 20
- Protective goggles x 20
- Hockey nets x 2
- Pucks x 2
- Badminton rackets x 20
- Badminton birds x 6
- Badminton sets (nets and poles) x 3
- Pinnies x 20 of each colour (2 colours)
- Volleyball set (nets and poles) x 1
- Volleyball ball x 2
- Large 18-m (60-foot) rope x 1
- First aid kit x 2

EXERCISE LAYOUT



Legend:

A: Soccer / Hockey

B: Volleyball / Badminton

C: First Aid Station

D: Tug of War

THIS PAGE INTENTIONALLY LEFT BLANK

EXERCISE PLAN TEMPLATE

TITLE OF THE PROJECT: _____

WHAT

WHY

HOW

A. General Outline – Main Events

Phase ____ – _____

Phase ____ – _____

Phase ____ – _____

Phase ____ – _____

Phase ____ – _____

B. Groupings

C. Tasks

Who	Tasks	Comments

D. Timings

E. Dress

RESOURCES

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

GUIDED DISCUSSION WORKSHEET

TP 5: Discuss sustaining motivation during a project.

INTRODUCTION

The aim of PO 503 is to provide the tools to take a project from its conception to its end, and that means through its execution. Since a project's success depends on the project manager's ability to organize, coordinate, and support a diverse team that is working toward a common goal, this lesson is going to allow discussing the execution of a plan, and specifically how to keep the members motivated throughout the duration of the project.

GUIDED DISCUSSION

Prepared Content / Learning Objectives	Notes / Comments / Answers from the Guided Discussion for Summary
<p>Motivation</p> <hr/> <p>PREPARED QUESTION:</p> <p>Q1. How is motivation created? Where does motivation come from?</p> <hr/> <p>ANTICIPATED ANSWER:</p> <p>A1. Even though motivation is a personal choice, leaders can create the opportunity for others to become motivated by giving them a sense of:</p> <ul style="list-style-type: none"> • desirability: giving value to achieving the goal; • feasibility: having people believe the project can be done; • progress: letting people know how they are doing; and • recognition: recognizing work well done. 	
<p>Desirability</p> <hr/> <p>PREPARED QUESTION:</p> <p>Q1. How do people react when they work on a project they believe is personally beneficial to them?</p> <hr/> <p>ANTICIPATED ANSWER:</p> <p>A1. When people feel a connection to the project, they are more inclined to work toward its accomplishment.</p>	

Prepared Content / Learning Objectives	Notes / Comments / Answers from the Guided Discussion for Summary
<p>Follow-Up Question if Required:</p> <p>Q1. How can people develop the notion that a project is beneficial to them?</p>	
<p>Follow-Up Answer if Required:</p> <p>A1. There are many ways for leaders to develop the notion that a project is personally beneficial. They can get team members to discuss:</p> <ul style="list-style-type: none"> • personal interests and goals and relating those to aspects of the project. • past projects that they enjoyed and why they enjoyed them. • some of the benefits that they hope to realize by working on the project and the value of those benefits. 	
<p>Feasibility</p>	
<p>PREPARED QUESTIONS:</p> <p>Q1. Do you believe feasibility is the same for everyone? How does it differ between individuals?</p> <p>Q2. How does it affect the people's attitude towards a project? How do people react when they work on a project they believe is unfeasible in opposition to a project they believe is feasible?</p>	
<p>ANTICIPATED ANSWERS:</p> <p>A1. Of course, feasibility is a subjective assessment. What seems impossible to one person can appear feasible to another.</p> <p>A2. Assessment of feasibility can become a self-fulfilling prophecy. If people think an assessment is feasible, they will work hard to complete it; if they encounter problems, they will try to work them out. However, if people really believe they have no chance of succeeding, they give up at the first sign of difficulty. Any problems just confirm what they already knew — the project was doomed from the start. Of course, as soon as they give up, they have no chance of succeeding, so their initial belief is that the project wasn't feasible has been confirmed.</p>	

Prepared Content / Learning Objectives	Notes / Comments / Answers from the Guided Discussion for Summary
<p>No matter how desirable people may feel a project is, they will give up more easily when they encounter any difficulties if they are convinced that nothing they do can cause it to succeed. People do not need a guarantee of success, but they must believe they have a chance.</p>	
<p>Follow-Up Question if Required: Q1. How can people develop the notion that a project is feasible?</p>	
<p>Follow-Up Answer if Required: A1. People can develop the notion that a project is feasible by:</p> <ul style="list-style-type: none"> • identifying potential concerns to the leader and getting them addressed; or • having the leader explain why they feel that targets and plans are feasible. 	
<p>Progress</p>	
<p>PREPARED QUESTION: Q1. Why should people be informed of how they are progressing?</p>	
<p>ANTICIPATED ANSWER: A1. People have to know how they are doing over time for various reasons, such as:</p> <ul style="list-style-type: none"> • achieving intermediate milestones provides personal satisfaction; • recognizing their successes confirms they are on the right track; and • successfully completing intermediate steps reinforces their beliefs that they can accomplish the final goals. 	
<p>Follow-Up Questions if Required: Q1. How do you feel when someone takes some interest in the work you have done? That such and such an area needs improvement or that you have done a great job so far? Q2. Have you ever seen a three-month project where all the major milestones occur in the last 3–4 weeks? When do you think people get serious about the project?</p>	

Prepared Content / Learning Objectives	Notes / Comments / Answers from the Guided Discussion for Summary
<p>Q3. How could you have kept those people on track earlier in the process?</p> <p>Follow-Up Answers if Required:</p> <p>A1. Answers will vary.</p> <p>A2. People tend to wait until the last minute, when no other motivation comes their way.</p> <p>A3. Do the following to help keep people on track and excited about the project:</p> <ul style="list-style-type: none"> • establish meaningful and frequent intermediate milestones; • continually assess how people are doing; • frequently share information with people about their performance; and • continually reinforce the project's potential benefits. 	
<p>Recognition</p>	
<p>PREPARED QUESTION:</p> <p>Q1. What are forms of rewards that you can give people?</p>	
<p>ANTICIPATED ANSWER:</p> <p>A1. Rewards can take multiple forms, such as:</p> <ul style="list-style-type: none"> • talking with the person and expressing your appreciation; • expressing appreciation in a written note or email; • expressing appreciation in writing to the person's supervisor; • issuing the person a certificate of appreciation; and • taking the person out to lunch. 	
<p>Follow-Up Question if Required:</p> <p>Q1. What are ways to make those rewards most effective?</p>	
<p>Follow-Up Answers if Required:</p> <p>A1. To make the rewards most effective:</p> <ul style="list-style-type: none"> • be sure your acknowledgment and appreciation is honest and sincere. 	

Prepared Content / Learning Objectives	Notes / Comments / Answers from the Guided Discussion for Summary
<ul style="list-style-type: none">• respect the person's personal style and preferences when giving the reward:<ul style="list-style-type: none">○ Some people enjoy receiving acknowledgments in front of their peers, while others prefer receiving them in private.○ Some people appreciate receiving an individual award; others appreciate receiving an award presented to the entire team.	

THIS PAGE INTENTIONALLY LEFT BLANK



**COMMON TRAINING
PROFICIENCY LEVEL FIVE
INSTRUCTIONAL GUIDE**



SECTION 3

EO M503.03 – CONDUCT AN EXERCISE

Total Time:

60 min

PREPARATION

PRE-LESSON INSTRUCTIONS

Resources needed for the delivery of this lesson are listed in the lesson specification located in A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 4. Specific uses for said resources are identified throughout the instructional guide within the TP for which they are required.

Review the lesson content and become familiar with the material prior to delivering the lesson.

PRE-LESSON ASSIGNMENT

Nil.

APPROACH

A group discussion was chosen for TPs 1 and 3 as it allows the cadets to interact with their peers and share their knowledge, experiences, and opinions about beginning and ending activities and supervision an activity.

An interactive lecture was chosen for TPs 2 and 4 to orient the cadets to how to begin and end an exercise and how to supervise an exercise.

INTRODUCTION

REVIEW

QUESTIONS:

- Q1. What is a project audience?
- Q2. What is the approach of dividing an item into its component parts to describe the details of a project?
- Q3. What is an important guideline to follow when assigning people tasks?
- Q4. What information needs to be included in a pre-exercise meeting?
- Q5. What are ways to encourage motivation?

ANTICIPATED ANSWERS:

- A1. A project audience is any person or group that supports, is affected by, or is interested in a project.
- A2. A work-breakdown-structure (WBS) is the approach of dividing an item into its component parts to describe the details of a project.
- A3. An important guideline to follow when assigning tasks is "Leaders should never assign other people tasks that they cannot clearly define themselves."
- A4. The information in a pre-activity meeting must include:
- what has to be done;
 - when it has to be done;
 - how it has to be done;
 - by whom it has to be done; and
 - available resources.
- A5. Motivation can be encouraged through:
- desirability,
 - feasibility,
 - progress, and
 - recognition.

OBJECTIVES

By the end of this lesson the cadet shall be expected to conduct an exercise.

IMPORTANCE

It is important for cadets to know how to conduct an exercise because monitoring and making changes as necessary are important steps in ensuring an exercise meets its goals. Also, announcing the activity at the appropriate time and holding a successful pre-exercise meeting allows people to prepare for the exercise.

Teaching Point 1**Have the cadets discuss how to begin and end an activity.**

Time: 10 min

Method: Group Discussion

BACKGROUND KNOWLEDGE

The point of the group discussion is to draw the following information from the group using the tips for answering / facilitating discussion and the suggested questions provided.

ELEMENTS OF AN INTRODUCTION

Always have the area set up, including placement of resources, prior to the arrival of participants. Ask the following questions before participants arrive:

- Are all the required resources in place?
- Does everyone involved in conducting the activity have a clear understanding of their responsibilities?
- Is there sufficient space?
- If applicable, can the weather be relied on? If not, is the backup plan ready and achievable?

Getting the team's attention. To introduce an activity, the leader first gets the attention of the team. The leader gets the team's attention before continuing to introduce the activity. If one cadet is not paying attention, they could miss an important point that could affect their participation in the activity or the activity's outcome.

Explaining the goal of the activity. The goal of the activity should be explained to the team in general terms of what will be learned or accomplished. The context of the activity should be explained so the cadets know why their participation is essential and why the activity is a part of the day's agenda. It is important not to give too much detail at this point, as the leader should draw some points on the purpose of the activity from the cadets after the activity's completion.

Explaining the activity. The activity must be explained to the team prior to participating in the activity. The rules of the activity must be clearly outlined and understood by all cadets prior to commencement. The leader should ensure the activity is clearly understood.

Assigning tasks as necessary. If any specific tasks need to be performed throughout the activity, the leader should assign cadets to these tasks during the introduction of the activity.

Setting time limits. The leader is to set a time limit for the cadets to participate in the activity. The leader must factor in time for debriefing the cadets after completion of the activity.

Relaying safety concerns as necessary. If there are any safety concerns, the leader must pass these on to the team prior to the start of the activity.

Motivating the team. Prior to the start of the activity, the leader must motivate the team. The leader should be enthusiastic and share this enthusiasm with the cadets. The goal of the activity is important and there is a reason the activity is being performed. The cadets should be informed of this reason and be motivated toward achieving the goal.

ELEMENTS OF A DEBRIEFING

Reviewing the goal. After the completion of an activity, it is important to review what the goal of that activity was with the cadets. Cadets always want to know why they had to participate in an activity or learn about a specific topic, so reinforce why the learning was important.

Providing feedback. The leader should first ask for feedback from the group on the activity. This can be done through some preset questions, specifically about the activity. It is important to find out how the cadets felt about the activity (eg, did they feel it was useful, did they learn anything from participating in the activity, etc). The leader gains valuable insight from the cadets on the activity itself (eg, if they would use it again, how it could be conducted differently, what elements of the activity they would not change if they did the activity again, etc). The most important information to elicit from the cadets is if they felt the activity was worthwhile. The leader must also give feedback to the cadets. Whether the goal was met is an important point to focus on during this stage. Why was the goal met or why not? Was the activity completed and did this have an effect on the goal being met? The leader should also give and get feedback on how the group interacted throughout the duration of the activity. The leader tells the cadets how they viewed the groups' interactions and ask how the cadets felt they interacted with each other.

Re-motivating the team. The final step in debriefing a group after an activity has been completed is to re-motivate the cadets.

GROUP DISCUSSION



TIPS FOR ANSWERING / FACILITATING DISCUSSION:

- Establish ground rules for discussion, eg, everyone should listen respectfully; don't interrupt; only one person speaks at a time; no one's ideas should be made fun of; you can disagree with ideas but not with the person; try to understand others as much as you hope they understand you; etc.
- Sit the group in a circle, making sure all cadets can be seen by everyone else.
- Ask questions that will provoke thought; in other words avoid questions with yes or no answers.
- Manage time by ensuring the cadets stay on topic.
- Listen and respond in a way that indicates you have heard and understood the cadet. This can be done by paraphrasing their ideas.
- Give the cadets time to respond to your questions.
- Ensure every cadet has an opportunity to participate. One option is to go around the group and have each cadet answer the question with a short answer. Cadets must also have the option to pass if they wish.
- Additional questions should be prepared ahead of time.

SUGGESTED QUESTIONS:

- Q1. What is the first thing you should do when starting an activity? Why?
- Q2. Should the goal of the activity be explained prior to commencing the activity? Why or why not? How will the activity be affected if the goal is not explained?
- Q3. What other considerations should be passed on during an introduction? Should safety concerns be passed on to the team or should they be left to figure them out as they proceed through the activity?
- Q4. What is the purpose of reviewing the goal of the activity after the completion of the activity?
- Q5. What feedback should be given from the group to the leader? How can this information be obtained? What feedback should the leader give to the group?



Other questions and answers will develop throughout the group discussion. The group discussion should not be limited to only those suggested.



Reinforce those answers given and comments made during the group discussion, ensuring the teaching point has been covered.

CONFIRMATION OF TEACHING POINT 1

The cadets' participation in the group discussion will serve as the confirmation of this TP.

Teaching Point 2

Explain how to begin and end an exercise.

Time: 5 min

Method: Interactive Lecture

Beginning and ending an exercise is very similar to beginning and ending an activity.



Ask the cadets to list actions that should be taken before cadets arrive.

Before cadets arrive, leaders should:

- inspect the exercise area for any damage or safety concerns;
- set up the exercise area; and
- ensure everyone involved has a clear understanding of their responsibilities.

When cadets arrive on grounds, leaders should hold an introductory meeting with the entire group to cover information that will be important throughout the exercise.



Ask the cadets to list information that should be included in an introductory meeting.

The introductory meeting should include information, such as:

- welcome to the participants,
- introduction of staff members,
- general outline of the exercise,
- safety concerns (eg, slippery floor, out-of bound areas, etc.),
- location of facilities (eg, washrooms, canteen, classes, gym, etc.),
- muster area in case of emergency, and
- first aid station.

At the end of the exercise, leaders should hold a conclusion meeting with the entire group to cover information that was relevant to the exercise.



Ask the cadets what information could be included in a conclusion meeting.

The conclusion meeting should include information, such as:

- conduct of the exercise (eg, competition winners);
- feedback from the instructors;
- feedback from the cadets; and
- recognition to individual or group contribution.



If leaders want more detailed feedback, they could get the cadets to write their feedback and submit it at the next training session.

After the cadets have left, leaders should:

- inspect the exercise area for any damage or safety concerns;
- tear down the exercise area;
- return stores.

Any damage to the exercise area or to the equipment need to be reported to the appropriate authority (eg, Training Officer, Commanding Officer, building management, Supply Officer, school administration, etc.).



One way to simplify the conclusion of an exercise is to include it in the WBS because it allows people to observe the importance of the final steps and maintain focus to the tasks that need to be carried out. It also ensures sufficient time and resources have been allocated for those activities to be performed.

CONFIRMATION OF TEACHING POINT 2

QUESTIONS:

- Q1. What are things that should be completed prior to the cadets' arrival?
- Q2. What information should be included in an introductory meeting?
- Q3. What information could be included in a conclusion meeting?

ANTICIPATED ANSWERS:

- A1. Prior to the cadets' arrival, leaders should:
- inspect the exercise area has for any damage or safety concerns;
 - set up the exercise area; and
 - ensure everyone involved has a clear understanding of their responsibilities.
- A2. The introductory meeting should include information, such as:
- welcome to the participants,
 - introduction of staff members,
 - general outline of the exercise,
 - safety concerns (eg, slippery floor, out-of bound areas, etc.),
 - location of facilities (eg, washrooms, canteen, classes, gym, etc.),
 - muster area in case of emergency, and
 - first aid station.
- A3. The conclusion meeting should include information, such as:
- conduct of the exercise (eg, competition winners);
 - feedback from the instructors;
 - feedback from the cadets; and
 - recognition to individual or group contribution.

Teaching Point 3**Have the cadets review supervising an activity.**

Time: 5 min

Method: Group Discussion

BACKGROUND KNOWLEDGE

The point of the group discussion is to draw the following information from the group using the tips for answering / facilitating discussion and the suggested questions provided.



Cadets should have previous knowledge on the subject as this was taught in EO M303.05 (Supervise Cadets).

THE PURPOSES OF SUPERVISION

There are three main purposes of supervision.

To provide protection. Supervision ensures the safety and well-being of personnel. Safety is the number one issue in every aspect of the Cadet Program. When situations are not safe, they are stopped immediately. CATO 14-31, *Director Cadets and Junior Canadian Rangers General Safety Program*, outlines the requirements for a general safety program that must be incorporated in every aspect of cadet activities.

To provide support. Supervision ensures that all members of the team are assisted, provided for and encouraged during tasks. If cadets are not practicing intrapersonal management, interpersonal management, teamwork and effective communication, the supervisor must act on the situation.

To provide quality assurance. Supervision ensures the outcomes of a task meet expectations for that task. If cadets are not meeting their responsibilities in completing the task, the supervisor must act on the situation. No one likes to be over-supervised. It is important not to micromanage the team.

HOW TO SUPERVISE

As leaders, cadets are expected to supervise others. Supervision takes place during the entire task, not just at the beginning or end of the task. Although each situation where supervision takes place is unique, there are some common responsibilities that must be fulfilled. Leaders shall meet these responsibilities by:

Ensuring safety. Ensuring that every situation in the Cadet Program is carried out in a safe manner is the primary concern of all members involved.

Ensuring the well-being of cadets. The welfare of cadets within the Cadet Program is a primary concern in the execution of all training and administrative tasks.

Encouraging cadets. Encourage cadets to produce satisfactory work because they want to. Inspiring results through praise creates a positive outcome.

Adjusting responsibilities as required. Being able to adjust a cadet's responsibilities during tasks is important. Cadets with experience may need less supervision and may be given extra responsibilities.

Maintaining control of cadets. Keep cadets on task while they are producing satisfactory work. An effective supervisor is able to keep cadets focused.

Correcting errors as required. If mistakes are made, effective supervisors communicate this. They revise what and how it needs to be done and remedy errors.

Reporting misconduct as required. When cadets behave in a manner that is inconsistent with the core leadership qualities of a cadet, these behaviours should be reported up the chain of command.

Ensuring completion of responsibilities assigned to cadets as required. When supervisors delegate or assign tasks to others, it is the supervisor's responsibility to ensure all delegated tasks are completed.



Successful supervisors are usually successful leaders.

GROUP DISCUSSION



TIPS FOR ANSWERING / FACILITATING DISCUSSION:

- Establish ground rules for discussion, eg, everyone should listen respectfully; don't interrupt; only one person speaks at a time; no one's ideas should be made fun of; you can disagree with ideas but not with the person; try to understand others as much as you hope they understand you; etc.
- Sit the group in a circle, making sure all cadets can be seen by everyone else.
- Ask questions that will provoke thought; in other words avoid questions with yes or no answers.
- Manage time by ensuring the cadets stay on topic.
- Listen and respond in a way that indicates you have heard and understood the cadet. This can be done by paraphrasing their ideas.
- Give the cadets time to respond to your questions.
- Ensure every cadet has an opportunity to participate. One option is to go around the group and have each cadet answer the question with a short answer. Cadets must also have the option to pass if they wish.
- Additional questions should be prepared ahead of time.

SUGGESTED QUESTIONS:

- Q1. What are the purposes of supervision? When does supervision take place?
- Q2. What do you think the responsibilities of an effective supervisor are?
- Q3. Which responsibility do you find the most important? Why?
- Q4. Which responsibility do you find the most difficult to apply? Why?
- Q5. List some examples where you have seen leaders use various responsibilities.



Other questions and answers will develop throughout the group discussion. The group discussion should not be limited to only those suggested.



Reinforce those answers given and comments made during the group discussion, ensuring the teaching point has been covered.

CONFIRMATION OF TEACHING POINT 3

The cadets' participation in the group discussion will serve as the confirmation of this TP.

Teaching Point 4

Explain how to supervise an exercise.

Time: 5 min

Method: Interactive Lecture

Supervising an exercise is very similar to supervising an activity.



Ask the cadets to list the three main purposes of supervision.

There are three main purposes to supervision:

- to provide protection;
- to provide support; and
- to provide quality assurance.

The same way cadets are supervised by activity leaders, activity leaders should be supervised by exercise leaders. When exercise leaders are supervising, they should:

- ensure completion of tasks;
- ensure the activity leaders are providing challenging, fun and safe training;
- stop an activity when it is deemed unsafe; and
- provide guidance to activity leaders.

PROVIDING FEEDBACK

Guidance should be provided to activity leaders at the appropriate time and in an appropriate manner.



Ask the cadets to list the principles of effective feedback. The material was taught in more details during EO M403.04 (Provide Feedback to Team Members).

Feedback may be given to the team as a whole or it may be given to individual team members. Giving feedback well is a skill. When giving feedback, it should be:

- frequent,
- accurate,
- specific,
- timely.



Ask cadets to list the ground rules for providing feedback. The material was taught in more details during EO M403.04 (Provide Feedback to Team Members).

The following ground rules for providing feedback may enable the team leader to give helpful, constructive feedback, without creating conflict or confrontational behaviour with team members.

The ground rules are:

- focusing on what is observed;
- focusing on behaviour;
- keeping it neutral;
- using it to inform;
- making it supportive; and
- keeping it simple.



Ask cadets to list the steps for providing feedback. The material was taught in more details during EO M403.04 (Provide Feedback to Team Members).

The purpose for providing feedback is to let team members know how they are doing and when they are not meeting expectations. Leaders should ensure that feedback is given when team members meet and / or exceed their commitments, as well as when team members do not meet their commitments. There are five steps for providing feedback:

- planning what to say;
- providing examples of behaviours;
- allowing time for feedback;

- motivating; and
- setting a timeline for action and follow-up.

CONFIRMATION OF TEACHING POINT 4

QUESTIONS:

- Q1. What are the three main purposes to supervision?
- Q2. What should exercise leaders do when supervising?
- Q3. What are the ground rules to providing feedback?

ANTICIPATED ANSWERS:

- A1. There are three main purposes to supervision:
- to provide protection;
 - to provide support; and
 - to provide quality assurance.
- A2. When exercise leaders are supervising, they should:
- ensure completion of tasks;
 - ensure the activity leaders are providing challenging, fun and safe training;
 - stop an activity when it is deemed unsafe; and
 - provide guidance to activity leaders.
- A3. The ground rules are:
- focusing on what is observed;
 - focusing on behaviour;
 - keeping it neutral;
 - using it to inform;
 - making it supportive; and
 - keeping it simple.

END OF LESSON CONFIRMATION

QUESTIONS:

- Q1. What elements should be included in an activity introduction?
- Q2. What are actions leaders should take prior to cadets' arrival on an exercise?
- Q3. What are the five steps for providing feedback?

ANTICIPATED ANSWERS:

A1. Elements that should be included in an activity introduction are:

- getting the team's attention;
- explaining the goal of the activity;
- explaining the activity;
- assigning tasks as necessary;
- setting time limits;
- relaying safety concerns as necessary; and
- motivating the team.

A2. Prior to cadets' arrival, leaders should:

- inspect the exercise area for any damage or safety concerns;
- set up the exercise area; and
- ensure everyone involved has a clear understanding of their responsibilities.

A3. The five steps for providing feedback are:

- planning what to say;
- providing examples of behaviours;
- allowing time for feedback;
- motivating; and
- setting a timeline for action and follow-up.

CONCLUSION

HOMEWORK / READING / PRACTICE

Nil.

METHOD OF EVALUATION

This EO is evaluated IAW A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 3, Annex B, 503 PC.

CLOSING STATEMENT

Once an exercise begins, there may be changes that need to be made. It is important for cadets to recognize the importance of supervising the activity to ensure it reaches its goals, goes as planned, and if not, that the appropriate changes are made.

INSTRUCTOR NOTES / REMARKS

Cadets shall be given the opportunity to conduct an exercise, as a member of a group, as part of their OJT.

REFERENCES

Nil.



**COMMON TRAINING
PROFICIENCY LEVEL FIVE
INSTRUCTIONAL GUIDE**



SECTION 4

EO M503.04 – CONCLUDE AN EXERCISE

Total Time: 30 min

PREPARATION

PRE-LESSON INSTRUCTIONS

Resources needed for the delivery of this lesson are listed in the lesson specification located in A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 4. Specific uses for said resources are identified throughout the instructional guide within the TP for which they are required.

Review the lesson content and become familiar with the material prior to delivering the lesson.

Make an OHP of Attachment A.

PRE-LESSON ASSIGNMENT

Nil.

APPROACH

An interactive lecture was chosen for TP 1 to orient the cadets to the conclusion of an exercise, the content of an after action report and the conduct of a debriefing.

An in-class activity was chosen for TP 2 as it is an interactive way to provoke thought and stimulate interest about after action report.

INTRODUCTION

REVIEW QUESTIONS:

- Q1. What are the elements in an activity debriefing?
- Q2. What actions have to be completed by exercise leaders after the cadets' departure?
- Q3. List the supervision responsibilities that a leader should meet.

ANTICIPATED ANSWERS:

- A1. The elements in an activity debriefing should include:
 - reviewing the goal;
 - providing feedback; and
 - re-motivating the team.

A2. After the cadets have left, leaders should:

- inspect the exercise area for any damage or safety concerns;
- tear down the exercise area;
- return stores.

A3. The supervision responsibilities that a leader should meet are:

- ensuring safety;
- ensuring the well-being of cadets;
- encouraging cadets;
- adjusting responsibilities as required;
- maintaining control of cadets;
- correcting errors as required;
- reporting misconduct as required; and
- ensuring completion of responsibilities assigned to cadets as required.

OBJECTIVES

By the end of this lesson the cadet shall be expected to conclude an exercise.

IMPORTANCE

It is important for cadets to conclude an exercise as it is an important step in project management. Recognizing areas for improvement and successes will allow people to take this knowledge into their next project and improve its chances for success.

Teaching Point 1**Explain the steps in the conclusion of an exercise.**

Time: 10 min

Method: Interactive Lecture

CONDUCTING A DEBRIEFING

Having a debriefing with the personnel involved in the exercise is a crucial step in identifying the practices to keep and the practices to avoid in future projects from the experience gained during the current project. The people involved in the project can, by sharing their experiences, observations and suggestions, help a leader recognize the achievements and areas for improvement encountered during the various planning and conducting stages of the exercise.

Like any meeting, the debriefing should be preceded by an agenda that may include:

- purpose of the debriefing,
- goals of the activity or activities,
- highlights, such as:
 - results, schedules, and resources,
 - tracking systems and procedures,
 - communications, and
 - practices and effectiveness;
- discussion and recognition of special achievements,
- review of reactions to the activity (cadets or supervisors),
- discussion of problems and issues, or
- discussion of how to reflect experiences from this project in future efforts.

During the debriefing, the following issues should be discussed:

- what was accomplished and individuals' contributions;
- techniques and approaches that worked to ensure they will be used in the future;
- techniques and approaches that did not work to ensure they are not used in the future, or they are used only following appropriate adjustments.

Here are a few things to keep in mind when planning a debriefing:

Invite the right people. Invite people that were involved. If the list is too long, decide to meet with the subgroups, then hold a general session where everyone reviews the results of the smaller meetings and where final comments and suggestions are made.

Ensure everyone understands the purpose of the meeting is to learn, not to blame. The post project evaluation is a means to examine what has been done to improve it.

If anyone starts to attack or criticize other participants, the discussion needs to be brought back to order. This can be done by asking questions, such as:

- What can you yourself do in the future to deal more effectively with such situations?
- What can we do in the future to prevent such situations from occurring?

It can also be done by having personnel:

- identify what others did well; or
- examine their own performance and see how they could have handled situations differently.



Be sure to assign a person to take notes during the debriefing. Those notes will be useful when writing the after action report (AAR).

CREATING AN AFTER ACTION REPORT (AAR)

As soon as possible after the debriefing, prepare and distribute an AAR based on notes from the briefing.

The AAR should include the following information:

- practices to incorporate in future projects,
- steps to take to encourage these practices,
- practices to avoid on future projects, and
- steps to be taken to avoid these practices.



After (and during if possible) the completion of a project, recognize the individuals or groups who helped "make it happen". Whether it be announcements or a thank you to who made it possible, recognizing those who worked hard is important.

CONFIRMATION OF TEACHING POINT 1

QUESTIONS:

- Q1. What has to be accomplished after the conduct of an exercise?
- Q2. What is the importance of the debriefing?
- Q3. What elements are found in an AAR?

ANTICIPATED ANSWERS:

- A1. After the conduct of an exercise, ensure the following tasks are completed:
- a tear down of the area,
 - return of resources,

- debriefing, and
 - AAR.
- A2. Having a debriefing with the people involved in the exercise is a crucial step in identifying the practices to keep and the practices to avoid in future projects from the experience gained during the current project.
- A3. The following elements are found in an AAR:
- practices to incorporate in future projects,
 - steps to take to encourage these practices,
 - practices to avoid on future projects, and
 - steps to be taken to avoid these practices.

Teaching Point 2

Conduct an activity where the cadets develop an after action report format.

Time: 15 min

Method: In-Class Activity

ACTIVITY

Time: 15 min

OBJECTIVE

The objective of this activity is to have the cadets develop their own AAR format.

RESOURCES

- Flip chart paper, and
- Markers.

ACTIVITY LAYOUT

Nil.

ACTIVITY INSTRUCTIONS

1. Divide the class into two groups.
2. Distribute a flip chart paper and markers to each group.
3. Tell the cadets they have to create a template for an AAR that must contain all the necessary information.
4. Allow the cadets eight minutes to work on the assignment.
5. Allow each group two minutes to present their work.
6. Have the cadets reflect on which format they prefer.

SAFETY

Nil.



Show the cadets Attachment A for an example of an AAR format that could be used.

CONFIRMATION OF TEACHING POINT 2

The cadets' participation in the activity will serve as the confirmation of this TP.

END OF LESSON CONFIRMATION

The cadets' conclusion of an activity will serve as the confirmation of this lesson.

CONCLUSION

HOMEWORK / READING / PRACTICE

Nil.

METHOD OF EVALUATION

This EO is evaluated IAW A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 3, Annex B, 503 PC.

CLOSING STATEMENT

It is important to properly close out an activity as the mistakes and success of an activity can be used when planning the next one. Leaders have to recognize the importance of taking a few moments to reflect on the learning experience from the activities they prepare and conduct.

INSTRUCTOR NOTES / REMARKS

Cadets shall be given the opportunity to conclude an exercise, as a member of a group, as part of their OJT.

REFERENCES

C3-252 ISBN 978-0-470-04923-5 Portny, S. E. (2007). *Project management for dummies*. Hoboken, NJ: Wiley Publishing.

AFTER ACTION REPORT

EVENT: _____

	SITUATION	SOLUTIONS & RECOMMENDATIONS
1. Training		
a. Time allocation	The time allocated for EO MXXX.XX was insufficient. Instructors did not have time to complete the class and had to leave out the last TP.	The class may be completed during a regular training night. Allow two periods for this class in next year's training schedule.
b. ...	...	...
2. Support		
a. Transportation	...	...
b. Facilities	The facilities were great. There was a sufficient number of classrooms for the number of lessons to be carried out. Having showers available was very useful. The fact that cadets had a chance to freshen up after the sports event was very appreciated by all.	Keep the same facilities for a similar event in the future.
3. Other		
a. ...	...	...
b. ...		
c. ...	...	...
4. Other		
a. ...	...	...
b. ...	...	...

By: _____

THIS PAGE INTENTIONALLY LEFT BLANK



**COMMON TRAINING
PROFICIENCY LEVEL FIVE
INSTRUCTIONAL GUIDE**



SECTION 5

EO C503.01 – EXAMINE MEETING PROCEDURES

Total Time:

90 min

PREPARATION

PRE-LESSON INSTRUCTIONS

Resources needed for the delivery of this lesson are listed in the lesson specification located in A-CR-CCP-805/PG-001, *Proficiency Level Five Qualification Standard and Plan*, Chapter 4. Specific uses for said resources are identified throughout the self-study package within the section for which they are required.

Self-study packages are intended to be completed by the cadet independently. More information about self-study packages can be found in the foreword and preface.

Review the lesson content and become familiar with the material prior to facilitating this lesson.

Photocopy the self-study package located at Attachment A for the cadet.

Photocopy the answer key located at Attachment B but **do not** provide it to the cadet.

For the final exercise located at the end of the self-study package, obtain a copy of an actual exercise plan or operations order (ops order) used by the squadron or photocopy the sample exercise located at Attachment C for the cadet.

PRE-LESSON ASSIGNMENT

Nil.

APPROACH

A self study was chosen for this lesson as it allows the cadet to examine meeting procedures at their own learning pace. This encourages the cadet to become more self-reliant and independent by focusing on their own learning instead of learning directed by the instructor.

INTRODUCTION

REVIEW

Nil.

OBJECTIVES

By the end of this lesson the cadet shall have examined meeting procedures.

IMPORTANCE

It is important for cadets to examine meeting procedures as the squadron will be participating in meetings to create proposals and prepare / conduct / conclude exercises.

SELF-STUDY PACKAGE INSTRUCTIONS

OBJECTIVE

The objective of this self-study package is to have the cadet examine meeting procedures.

RESOURCES

- Self-study package, and
- Pen / pencil.

ACTIVITY LAYOUT

Provide the cadet with a classroom or training area suitable to complete the self-study package.

ACTIVITY INSTRUCTIONS

1. Provide the cadet with a copy of the self-study package located at Attachment A and a pen / pencil.
2. Allow the cadet 90 minutes to complete the self-study package.
3. Provide assistance as required to the cadet.
4. Collect the self-study package once the cadet has finished.
5. Correct the self-study package with the self-study package answer key located at Attachment B.
6. Provide feedback to the cadet and indicate whether or not they have completed the Enabling Objective (EO).
7. Return the completed self-study package to the cadet for their future reference.
8. Record the result in the cadet's logbook and Cadet Training Record.

SAFETY

Nil.

END OF LESSON CONFIRMATION

The cadet's completion of the self study package will serve as the confirmation of this lesson.

CONCLUSION

HOMEWORK / READING / PRACTICE

Nil.

METHOD OF EVALUATION

Nil.

CLOSING STATEMENT

By examining meeting procedures, you will have a better understanding of the benefits of meetings and on how to facilitate them to ensure their success.

INSTRUCTOR NOTES / REMARKS

This self study shall only be completed after the mandatory component of PO 503 (Lead Cadet Activities).

REFERENCES

A0-010 CATO 11-03 Director Cadets 2. (2006). *Cadet program mandate*. Ottawa, ON: Department of National Defence.

A0-201 United States Army Medical Department Battle Simulation Center (2003). *Military briefings*. Retrieved February 26, 2010 from http://www.cs.amedd.army.mil/simcenter/military_briefings.htm

C0-004 ISBN 1-58062-577-0 McClain, G., & Romaine, D. S. (2002). *The everything managing people book*. Avon, MA: Adams Media.

C0-021 ISBN 1-58062-513-4 Adams, B. (2001). *The everything leadership book*. Avon, MA: Adams Media.

C0-022 ISBN 0-02864-207-4 Cole, K. (2002). *The complete idiot's guide to clear communications*. USA: Pearson Education, Inc.

C0-112 ISBN 0-8407-6744-7 Maxwell, J. C. (1993). *Developing the leader within you*. Nashville, TN: Thomas Nelson Inc. Publishers.

C0-113 ISBN 1-882664-12-4 Karnes, F. A., & Bean, S. M. (1995). *Leadership for students: A practical guide for ages 8–18*. Waco, TX: Prufrock Press.

C0-114 ISBN 0-02-863656-2 Pell, A. R. (1999). *The complete idiot's guide to team building*. Indianapolis, IN: Alpha Books.

C0-115 ISBN 0-7879-4059-3 van Linden, J. A., & Fertman, C. I. (1998). *Youth leadership*. San Francisco, CA: Jossey-Bass Inc., Publishers.

C0-144 Colver, E., & Reid, M. (2001). *Peacebuilder 3: Peer helping participant resource guide*. Ottawa, ON: YouCAN.

C0-245 ISBN 1-58062-513-4 Adams, B. (2001). *The everything leadership book*. Avon, MA: Adams Media.

C0-256 ISBN 0-7894-4863-7 Heller, R. (1999). *Achieving excellence*. New York, NY: DK Publishing, Inc.

C0-270 Maslow, A. H. (1943). A theory of human motivation. *Psychological Review*, Vol. 50(4), 370–396.

C0-271 Farthing, D. (2001). *Peacebuilder 1: Conflict resolution youth reference guide*. Ottawa, ON: YouCAN.

C0-410 The ASPIRA Association. (2009). *Module #5: Defining leadership styles*. Retrieved on February 12, 2009, from http://www.aspira.org/files/documents/youthdev08/U_V_M_5_dls.pdf

C0-413 University of Arkansas, Division of Agriculture, Cooperative Extension Service. (2006). *4-H volunteer leaders' series: The enabler—A leadership style*. Retrieved February 18, 2009, from http://www.uaex.edu/other_areas/publications/PDF/4HCD2.pdf

C0-468 ISBN 0-06-091573-0 Hamlin, S. (1989). *How to talk so people listen*. New York, NY: Harper & Row Publishers.

C0-469 ISBN 1-57851-143-7 Argyris, C., Bartolomé, F., Bourgeois, L. J., III, Eisenhardt, K. M., Jay, A., Kahwajy, J. L., et al. (1999). *Harvard business review on effective communication*. Boston, MA: Harvard Business School Publishing.

C3-251 ISBN 978-0-306-81354-2 Robert, H. M., III, Evans, W. J., & Honemann, D. H. (2004). *Robert's rules of order: Newly revised in brief*. New York, NY: Perseus Books Group.

THIS PAGE INTENTIONALLY LEFT BLANK

Examine Meeting Procedures



SECTION: 1 IDENTIFY TYPES OF MEETINGS

SECTION: 2 EXAMINE HOW TO ORGANIZE MEETINGS

SECTION: 3 EXAMINE HOW TO FACILITATE MEETINGS

SECTION 1 IDENTIFY TYPES OF MEETINGS

TYPES OF MEETINGS

There are many types of meetings, such as two friends meeting over coffee or a session of the House of Commons. The two types of meetings that will be described here are the ones used most often within the Cadet Program: briefings and committee meetings.

BRIEFING

A briefing is a type of meeting used to convey what needs to be done during an exercise or to inform the participants of an activity and of the necessary details. There is little input from the group except asking clarifying questions.

Briefing. A meeting for delivering information or instructions.



As a cadet, a briefing is the most common type of meeting you would be expected to facilitate.

As a cadet, there are two types of briefings you may be asked to facilitate:

- **Information briefing.** The information briefing is intended to inform the listeners and to gain their understanding. The briefing deals primarily with facts. The briefer provides a brief introduction to define the subject and to orient the listener and then presents the information.
- **Staff briefing.** The staff briefing is intended to secure a coordinated or unified effort. This may involve the exchange of information, the making / announcement of decisions, the issuance of directives, or the presentation of guidance. The staff briefing may include characteristics of an information briefing.

Functions of a Briefing

A briefing needs to be clear, concise, and complete. It needs to be tailored to its audience; a briefing for the activity leaders of an exercise is different from the one you would give to the cadets participating in the exercise.

- **Communicating the overall plan.** Explain how the exercise will be carried out. Always include safety details that affect the whole exercise (eg, fire orders, muster points, first aid personnel, and boundaries). All team members should know what is involved. This may include identifying various stages and phases.
- **Communicating the tasks involved in the leadership appointment.** Explain the tasks involved within the exercise.
- **Assigning tasks to team members as applicable.** Assign team members tasks that must be completed within the scope of the exercise. Every team member should be actively engaged in a meaningful activity.
- **Ensuring the team members understand their tasks.** Confirm team members understand their tasks and ask the team members if they have any questions. The team leader should also ask questions of various team members to ensure comprehension. When team members are assigned specific tasks, it is important they understand what is expected of them.



Think about questions you could ask or actions you could take to ensure everyone has understood their tasks.

COMMITTEE MEETING

A committee meeting is used to plan and organize an exercise. Members' participation is necessary for this type of meeting to be successful.

Committee meeting. A group of people, nominally up to 12 members, headed by a chairperson, meeting for discussion and debate on subjects relevant to its members.



Now that you know that members' participation is necessary in a committee meeting, how would you ensure maximum participation in your meeting?

During your time in cadets, most of the meetings you have attended were briefings. Younger cadets have little input in the planning and organization of the activities in which they participate. As you have progressed through the Cadet Program, the tasks that you have been assigned to complete have progressed from leading a small group of cadets in setting up a classroom to leading a flight on parade.

Functions of a Committee Meeting

Meetings fulfill many functions for the team. The functions of a meeting include:

- defining the team;
- providing an opportunity where the team revises, updates, and adds to what it knows as a team;
- helping everyone to understand the collective aim of the team and the way in which their work contributes to the team's success;
- creating a commitment to the decisions it makes and the objectives it pursues; and
- creating an occasion where the team physically exists and works **as a group**, and the only time when the leader is the leader of the team and not just a person to whom individuals are responsible to.

Objective(s) of a Meeting

There are many reasons to have meetings. As part of Proficiency Level Five you will participate in meetings to create proposals and prepare / conduct / conclude exercises as part of PO 503 (Lead Cadet Activities). Here are some meeting objectives:

- **Legislative framework.** The objective of the meeting is to clarify the organizational makeup of the team; its rules, routines and procedures (eg, who is responsible to whom, how problems should be addressed, what tasks need to be completed) through which all action takes place.
- **Executive responsibilities.** The objective of the meeting is to determine who will be responsible for what tasks. Each member sees what others are doing and also understands how their roles / responsibilities fit into the whole project / exercise.
- **Constructive / originative.** The objective of the meeting is to guide a discussion where the knowledge, experience, judgment and ideas of the team are used to come up with or think through a proposal, project, exercise, etc.
- **Informative / digestive.** The objective of the meeting includes progress reports—to keep the team up-to-date on the current status of the tasks—and a review of the completed project to see what can be learned for the next time (eg, a meeting used to determine details of an After Action Report).

SECTION 2

EXAMINE HOW TO ORGANIZE MEETINGS

HOW TO ORGANIZE A BRIEFING

To organize your briefing, you will need the complete activity or exercise plan. It should state the who, what, where and when of the briefing.



Tell them what **they** need to know, **not** all **you** know!

Organizing a briefing requires four steps:

1. **Analyze the situation.** This includes analyzing the audience and the occasion by determining:
 - Who is to be briefed and why?
 - How much knowledge of the subject does the audience have?
 - What is expected of the briefer?
2. **Construct the briefing.** The construction of the briefing will vary with its type and purpose. The analysis provides the basis for this determination. The following are the major steps in preparing a briefing:
 - a. Know the subject thoroughly.
 - b. Isolate the key points.
 - c. Arrange the key points in logical order.
 - d. Select visual aids, if required.
 - e. Establish the wording.
 - f. Rehearse before a knowledgeable person who can critique the briefing.
3. **Deliver the briefing.** A successful briefing is dependent on how it is presented. A confident delivery, clearly enunciated and obviously based on full knowledge of the subject helps convince the audience. The briefer maintains a relaxed, but professional bearing using natural gestures and movement, but avoiding distracting mannerisms. The delivery is characterized by conciseness, objectivity, and accuracy. The briefer must be aware of the following:
 - The basic purpose is to present the subject as directed and to ensure that it is understood by the audience.
 - Brevity precludes a lengthy introduction or summary.
 - Interruptions and questions may occur at any point. If these interruptions occur, the briefer answers questions before proceeding or should indicate that questions will be answered later in the briefing. Do not permit questions to distract you from your planned briefing. If the question will be answered later in the briefing, the briefer should make specific reference to the earlier question when introducing that material. The briefer should anticipate possible questions and be prepared to answer them.
4. **Follow-up.** Ensure an understanding of the material. When the briefing is over, the briefer should elicit the opinion of a peer or superior for a critique.

HOW TO WRITE A BRIEFING

The following is a format used when writing an information briefing.

The Information Briefing

The information briefing should follow this format:

1. The introduction, to include:
 - a. greeting,
 - b. purpose and scope, to include:
 - (1) giving the big picture first; and
 - (2) explaining the purpose and scope of your briefing; and
 - c. outline or procedure, to include:
 - (1) summarizing the key points and your general approach; and
 - (2) explaining any special procedures (eg, demonstrations).
2. The body, to include:
 - a. arranging the main points in a logical sequence;
 - b. using visual aids to emphasize your main points;
 - c. planning effective transitions from one main point to the next; and
 - d. being prepared to answer questions at any time.
3. The closing, to include:
 - a. asking for questions;
 - b. summarizing the key points and making a concluding statement; and
 - c. announcing what will be happening next.

What to Consider When Writing a Staff Briefing

The staff briefing should include:

1. **General.** The staff briefing is an information briefing presented to the staff who are leading the activities or responsible for completing tasks for the exercise.
2. **Purposes of a staff briefing.** Give specific instructions, if required. The staff briefing serves to:
 - issue or elaborate on the exercise plan;
 - instil a general appreciation of the exercise;
 - review the key points of the exercise plan; and
 - ensure participants know the exercise's objective(s), problems that may arise, and ways to overcome them.
3. **Format.** A staff briefing is normally informal and has no set format.



Activate Your Brain #1:

What are the four steps when organizing a briefing?

HOW TO ORGANIZE A MEETING

During EO M503.02 (Prepare an Exercise), a basic procedure on how to plan a pre-exercise meeting was described. The following (more formal and detailed) procedures on how to organize and facilitate a meeting are from *Robert's Rules of Order: Newly Revised in Brief*, more commonly known as Robert's Rules of Order.



Did you know?

When Henry Martyn Robert (an officer in the United States Army) was asked to preside over a church meeting, he realized he did not know how. He tried anyway and his embarrassment was supreme. This event, which may seem familiar to many, left him determined never to attend another meeting until he knew something about parliamentary law. He studied the books that were available on the subject, but soon realized that every part of the United States had differing ideas of the correct procedure. To bring order to the chaos, he decided to write *Robert's Rules of Order* (first published in 1876) which quickly became the most commonly used procedures for facilitating meetings in the country.

Duties of the Chairperson

It is the responsibility of the chairperson for all planning for a meeting, which includes:

- setting the timings for the meeting;
- creating the agenda;
- running the meeting;
- supervising debate;
- conducting any voting; and
- creating the minutes.

Setting the Timings for the Meeting

Team members shall be notified of meetings as soon as possible to allow the meeting to be more productive and allow all members to express their concerns.

Creating the Agenda

Every meeting must first be convened. This process should begin with an agenda. The most critical priority for a meeting must always be to avoid wasting members' time. An effective agenda is the best tool for that purpose.

The agenda structures the order of business for a meeting and is a guide for attendees to follow. When setting the agenda, think of it as a set of rules for a good meeting.

The agenda must provide the organization's name, the date, time and place of the meeting. It should also give a finish time and, where possible, an approximate time for each item, so that the chairperson can keep an effective rein on the meeting by using the time framework.

Standard agenda items and their suggested order are:

1. confirmation of the minutes from the previous meeting;
2. matters arising from the previous minutes (any matter that was raised at the previous meeting which needed follow-up action on a carried motion);
3. correspondence in and out;
4. reports (these could be from the team's various departments); and
5. general business (brief background information on agenda topics as required).

The chairperson can vary the order of business at the meeting if the meeting members agree.



An agenda is more effective if given to the members before the meeting rather than at the meeting.

Running the Meeting

All business is brought before the assembly in the form of a motion. Before members can make a motion or address the assembly they must obtain the floor using the following protocol:

1. The members will raise their hand and wait to be recognized.
2. The chairperson is addressed by title, "Mr. Speaker" or "Madame Speaker".
3. The member introducing a motion has the first right to the floor.
4. Members who have not spoken to a motion shall have precedence over those who have.
5. The chairperson must recognize any member who seeks the floor while entitled to it.
6. Before a motion is open to debate it must (if required) be seconded and stated by the Speaker after which it is open to debate.
7. All important motions and amendments shall be in writing.
8. After the Speaker has stated a motion it is the property of the assembly and can only be withdrawn with unanimous consent or permission of the assembly.

Debate

Speeches shall conform to the following rules:

- Maximum speech length, as determined by assembly, will be respected.
- Decorum in debate will be maintained, to include:
 - remarks must be confined to the merits of the pending question;
 - attacks on a member's motives are not allowed;
 - all remarks must be addressed through the chairperson;

- the use of members' names will be avoided;
 - refrain from speaking against one's own motion;
 - stop speaking during an interruption by the chairperson; and
 - refrain from disturbing the assembly.
- The chairperson is not to take part in the debate.
 - When possible, the chairperson shall alternate the debate between those for and those against the motion.

Voting

Voting, if required, shall conform to the following rules:

- Procedures for voting shall be as the chairperson suggests.
- A member can change their vote until the time that the result is announced.
- A straw poll (an unofficial ballot taken as a test of opinion) is not in order for official purposes; a formal vote is required.



Did you know?

For a vote to be valid, a quorum must exist.

Quorum. The fixed minimum number of members that must be present to make the proceedings of an assembly, society, or meeting valid.

Creating the Minutes

Minutes. A brief summary of the proceedings of a meeting.

Minutes should be taken by someone other than the chairperson. This allows the chairperson to concentrate on facilitating the meeting. Minutes shall contain enough information to:

- maintain an accurate historical account of a meeting held; and
- allow for a clear understanding of the business that was conducted for those present and not present.

As a guideline, minutes should contain the following information:

- name of body, associated office, department or organization;
- date, time and location of the meeting;
- the list of attendees, guests and regrets (including the chairperson, and recording secretary);



Regrets. Expressing polite apologies for not being able to attend a meeting.

Members who cannot attend the meeting contact the chairperson with their reasons. The chairperson informs the recording secretary of those members who have sent regrets to distinguish them from members who did not contact the chairperson about their absence.

- a record of all motions that were presented;
- a clear distinction between open and closed sections of the meeting;
- consecutively numbered pages (use a header with meeting name, date, and page number);
- time of adjournment; and
- list of titles of any reports presented during the meeting.



Principles for effective minute-taking:

- **BEFORE** the meeting:
 - If possible, meet with the chairperson to set the agenda.
 - Learn what is expected to be included in the meeting minutes.
 - Use the agenda to make an outline for recording purposes.
 - Make sure there is a backup recording tool (eg, if taking minutes using a laptop computer, having pen and paper available if there are problems).
 - Make an extra copy of the agenda and / or materials to bring to the meeting.
 - Read and review all meeting materials.
 - Prepare an attendance sheet (know who is expected to attend and who sent regrets).
- **DURING** the meeting:
 - When possible, sit next to the meeting chairperson.
 - Follow the sequence of the meeting using the agenda.
 - Listen actively.
 - Focus on documenting the main ideas, processes and outcomes.
 - Record all motions and results (if not clear on the wording, ask for the motion to be repeated).
- **AFTER** the meeting, compose the minutes as follows:
 - If needed, ask the chairperson for clarification on any issues discussed.
 - Draft the minutes as soon as possible, while everything is still fresh.
 - Include only factual and concise statements about each issue discussed.
 - Omit unnecessary details.
 - Record in the past tense and in the third person.
 - Proofread, and then have the chairperson proofread.
 - Ensure the minutes, and amendments if required, are available for approval at the next meeting.



Activate Your Brain #2:

What are the duties of the chairperson?

SECTION 3 EXAMINE HOW TO FACILITATE MEETINGS

FACILITATING THE MEETING

Remember the objective of the meeting and stay on track. The two most important things for this to happen are the agenda (for dealing with the subject) and the actions of the chairperson (for dealing with the people).

Dealing With the Subject

When planning the agenda, the placement or order of items to be discussed can be very helpful for dealing with the subject of the meeting.

For example, you could:

- place smaller items first on the agenda to build up a sense of success before dealing with the main item;
- place the main item first to ensure it is discussed, leaving the smaller items to be decided after or at another meeting; or
- place a contentious item last so it can not potentially disrupt the entire meeting.

Dealing With the People

Dealing with people is an important skill, especially when you are in a position of leadership. Chairpersons need to build trust between themselves and their followers. There are six critical areas:

- **Communication.** Must always be a two-way street.
- **Support.** Being approachable, helpful, and concerned, especially when things are not going well.
- **Respect.** A question of delegating authority and listening to what subordinates have to say.
- **Fairness.** Giving credit and assessing blame where they are due.
- **Predictability.** Being dependable and keeping promises.
- **Competence.** Knowing your own job and doing it well.

Leadership is influence and influence is exercised through communication. Like any skill, competent communication must be learned and developed over a lifetime. Communication skills permit the flow of ideas from one individual to another or to a group, and vice versa. The process of communication can include both verbal and non-verbal messages. Understanding the three styles of communication aids you when facilitating a meeting by knowing who to watch out for (aggressive), who to draw out (passive) and who to support (assertive).

The ability of the team to work during a meeting is determined by their ability to work together. This is the primary task of the chairperson. Your conduct, both verbal and non-verbal, will set the tone for the meeting.

LEADERSHIP APPROACHES

There are three main leadership approaches discussed in the Cadet Program. They are:

- control,
- coach, and
- empower.

Each leadership approach is based on balancing the concern for the relationship with team members for the concern for accomplishing the goal(s) of the meeting.

All leadership approaches may be required when facilitating a meeting. You have to rely on your training and experience to help you decide which approach is best for a given situation.



As a chairperson, this can be the most difficult part in running a meeting. Often, getting everyone to participate can be a challenge.

MEETINGS: WHAT CAN GO WRONG AND WHY

When you have a group of people together at a meeting, anything can happen. A **poorly** facilitated meeting quickly reinforces the idea that meetings are a waste of time. The following definitions describe how members may act / feel during meetings.

Passivity. The members are only attending because they have to. They feel that they have little to no input into the overall plan.

Boring. Most of the meeting has nothing to do with most of the members, so why are they here? The only part of the meeting that interests the member is theirs!

People don't listen. Listening is a skill and many people are poor listeners. This is understandable as people think faster than they can talk, creating down time for their brain; when listening to others the brain "fills" this down time between the speaker's words with their own thoughts. Another reason people don't listen is the subject; other members' ideas are not as good as theirs so why listen?

Grandstanding. Sometimes one or two members seem to dominate the discussion. This grandstanding has the effect of overwhelming the younger, less experienced and less aggressive members.

The power of the leader. It's hard to disagree with the leader. If you, as the chairperson, are seen as favouring one idea, the members are less likely to challenge / disagree with it.

Foregone conclusions. Members feel that a meeting is a waste of time if it appears the chairperson has already made a decision.

Not useful. Members' past experiences of finishing a meeting left them not sure exactly what was decided and what they are to do next. This gives them the opinion that the meeting was a waste of time.

Fear of exposure. If members talk about their ideas or express opinions, they expose themselves to public criticism. This can be devastating to a young person, especially when such criticism is done by someone they respect.

Potential conflict. Most people prefer to get along with others. When you disagree with someone, there is the potential for conflict. Members who disagree may feel isolated or unpopular and opt instead for the safety of silence. Also, some people enjoy provoking conflict and these people need to be watched out for.

Prior relationships brought to the meeting. Members who associate together are seen by other members as a clique. Such cliques are seen as supporting their own members, even over the good of the team. If there is more than one clique, there is a potential for rivalry to overshadow the meeting.

Concern about consequences. What will be required of the members when an idea is accepted? Will some members have to do more than others? What are the consequences of not being able to do my part? This anxiety can make attending a meeting a very unpleasant experience for some members.



Have you experienced any of the situations described above? What is your opinion about attending a meeting?

MEETINGS: WHY THEY ARE IMPORTANT

With all these problems is it even worth the effort to have meetings? Before you can make this decision, here are some of the reasons why meetings are important.

Getting a sense of the whole. So much work is done by individuals or small groups that it becomes vital for the team to see the big picture. This gives everyone a sense that their work is part of the plan, helping build morale and esprit de corps.

Comparing notes. By comparing notes, problems affecting one member may be solved by another member who had a similar problem.

Sharing information. Learning what others have done, hearing ways similar problems were solved, and being able to share something learned all builds toward a positive outcome for the meeting and the team.

Being visible to each other. Much of the team's work is done by individuals or small groups, so it can be difficult to actually be a team. Being together in a meeting allows the energy of the members to synergize the members into a team. It also allows the leader to be seen as a leader and not just someone that you report to.

Comfort of hearing others' opinions openly. It can be very uncomfortable discussing ideas and opinions one-on-one with the leader. However, if this is done by everyone as a team, there is less anxiety due to the fact that everyone is in the same boat. Such openness also create a norm of acceptable discussion.

Looking for solutions jointly. The saying "two heads are better than one" emphasizes the concept that there is usually more than one way to do something. Sometimes members get so caught up in their own thoughts and ideas that they don't see all the ways something can be done.

Group self-critique. If problems are aired by self-critique (eg, you talk about problems **you** are having), and everyone is doing it, it is easier to discuss the problems in a non-conflictive manner. By bringing up your own problems, you are trusting in the team to help you solve them. This also builds morale and esprit de corps.

Developing consensus. If there is consensus, the team as a whole gains a sense of ownership to the exercise. If everyone is in agreement, conflicts are resolved through solving the problem, not attacking the one who saw the problem.

Stimulating ideas. The atmosphere of the team focusing on one idea brings the creative level up for all the members. Discussing possible solutions stimulates other members to add to the idea to make it better.



In your opinion, why are meetings important?

THINGS TO WATCH OUT FOR DURING THE MEETING

As you have read, facilitating a meeting draws heavily on leadership principles and skills. The following are things to watch out for during the meeting.

Control the talkative. Some people can take a very long time to say very little. Remember, your meeting needs to stay on track. First try non-verbal cues (eg, staring the speaker in the eye) and, if necessary, verbal ones (eg, taking over the conversation by moving the discussion on) to control the talkative speaker.

Draw out the silent. Everyone's input is important, otherwise why are they at the meeting? However, for various reasons, most people remain silent throughout a meeting. People who are included in the planning / preparation of the project will usually work to make it successful.



Activate Your Brain #3:

For the following phrases, which style of communication (aggressive / passive / assertive) do they most resemble?

Control the talkative

Draw out the silent

Protect the timid. The input of the younger / less experienced members of the group may provoke disagreement with their seniors, which is reasonable. However, if the disagreement escalates to personal attacks or suggestions that the younger / less experienced members should not contribute ideas, the morale of the team will quickly deteriorate. Successful participation in a productive meeting builds confidence for all, especially the younger / less experienced members.

Encourage the clash of ideas. If the goal is to have the best outcome, then all ideas need to be thoroughly discussed. However, this may become a clash of personalities (between those whose ideas are being discussed) instead of the ideas. As chairperson, you need to keep the tone of the discussion professional. Keep the discussion on the ideas, not the people promoting them.

Watch out for the suggestion-squashing reflex. If people feel that making a suggestion will provoke the negative reaction of being laughed at or squashed, they will soon stop suggesting ideas. This can be most destructive if it is done by the chairperson! Instead, take notice of all suggestions, especially if it is suggested by a younger / less experienced member of the team.

Come to the most senior people last. This serves several purposes. It allows the younger / less experienced members of the team the experience of participating in the discussion. It also allows these younger / less experienced members to present their ideas before hearing the ideas of the older / more experienced members.



Remember when you were the younger / less experienced member of a team? Did you experience anxiety when you were teamed with older / more experienced cadets?

Close on a note of achievement. Making a meeting worth the effort means ensuring that it is seen as a success. At the end of the meeting, make it a point of emphasizing all that was accomplished. Remember, as chairperson, it is your responsibility to ensure the meeting was a success!



Congratulations, you have completed your self-study package on EO C503.01 (Examine Meeting Procedures). Complete the following exercise and hand the completed package to the Training / Proficiency Level Officer and have them record the completion in your Proficiency Level Five Logbook.

**FINAL EXERCISE
PREPARE A BRIEFING**

Using the information briefing format, create a briefing for the provided exercise plan (Item #4 on the timetable).

Note. If there are more than five key points, use blank paper to complete.

INTRODUCTION

Greeting: _____

Purpose and Scope:

Give the big picture first. _____

Explain the purpose and scope of your briefing. _____

Outline or Procedure:

Briefly summarize the key points and your general approach. _____

Explain any special procedures (eg, demonstrations). _____

BODY

Point #1: _____

Visual Aid? No Yes Description: _____

Possible Questions: _____

Transition: _____

Point #2: _____

Visual Aid? No Yes Description: _____

Possible Questions: _____

Transition: _____

Point #3: _____

Visual Aid? No Yes **Description:** _____

Possible Questions: _____

Transition: _____

Point #4: _____

Visual Aid? No Yes **Description:** _____

Possible Questions: _____

Transition: _____

Point #5: _____

Visual Aid? No Yes **Description:** _____

Possible Questions: _____

Transition: _____

CLOSING

Ask for Questions

Briefly recap key points:

Point #1: _____

Point #2: _____

Point #3: _____

Point #4: _____

Point #5: _____

Make a Concluding Statement:

Announce What Will Be Happening Next:

THIS PAGE INTENTIONALLY LEFT BLANK

ACTIVATE YOUR BRAIN ANSWER KEY



Activate Your Brain #1:

What are the four steps when organizing a briefing?

Analyze the situation.

Construct the briefing.

Deliver the briefing.

Follow-up.



Activate Your Brain #2:

What are the duties of the chairperson?

- **setting the timings for the meeting**
- **creating the agenda**
- **running the meeting**
- **supervising debate**
- **conducting any voting**
- **creating the minutes**



Activate Your Brain #3:

For the following phrases, which style of communication (aggressive / passive / assertive) do they most resemble?

Control the talkative **aggressive**

Draw out the silent **passive**

GUIDELINES FOR MARKING THE FINAL EXERCISE

When marking the final exercise, the following points should be considered:

- Is it legible?
- Are all sections complete?
- Could another person use this briefing effectively?

INTRODUCTION

- Did the cadet state their name in the greeting?
- Is the purpose and scope of the briefing explained?

BODY

- Are all key points of the exercise plan covered?
- Are all points organized in a logical order?
- Are all points clear and concise?
- Are visual aids planned?
 - If no, should a visual aid(s) have been planned?
 - If yes, was it appropriate?
- Are possible questions prepared for?
 - If no, have the cadet explain why not?
 - If yes, are they appropriate?
- Are transitions planned between points?

CLOSING

- Are all points recapped?
- Is the concluding statement motivational?
- Is the happening next announcement correct?

EXERCISE PLAN EXAMPLE

TITLE OF THE EXERCISE: SPORTS EVENT: OPERATION GET-YOUR-MOVE-ON

WHAT

Unit 123 Moncton will participate in Operation GET-YOUR-MOVE-ON, a sports event to be conducted at the Moncton Everblue High School on Saturday, 10 Mar 2012 from 0900 hrs–1600 hrs.

WHY

Unit 123 Moncton will conduct the sports event to promote physical fitness amongst all cadets, to introduce them to various sports, and to develop leadership and refereeing skills in senior cadets. The event will take place over one day to allow the conduct of multiple sports.

HOW

A. General Outline

Example: This exercise will be conducted in five phases:

1. Phase One – Administration

The pre-activity meeting will be conducted on 21 Feb 12 in the CO's office at 1730 hrs. All members will attend. Booking of facilities, administrative preparation and planning are being completed by the Training Officer.

2. Phase Two – Preparation of Facilities

Prior to the cadets' arrival, all sergeants are required to prepare the facilities. The equipment for all sports events is to be taken out of the supply room and placed in the appropriate area. Signs identifying bathrooms, water points, and safety points have to be put up. This should be completed NLT 0840 hrs.

3. Phase Three – Conduct of the Exercise

As per schedule. Will include exercise / safety briefing, warm-up, conduct of the sports, lunch, cool-down and activity debriefing. Cadets will be allowed to leave at 1600 hrs.

4. Phase Four– Return of Stores

Return of stores, clean-up of facilities.

5. Phase Five - Post-exercise meeting

Post-exercise meeting will be conducted on Sunday 11 Mar 2012 at the CO's office from 1700 hrs to 1830 hrs. All senior cadets and officers will attend.

B. Groupings

Cadets will be divided upon arrival into four different sports teams. WO1 Mackey will ensure this is done as soon as cadets are on ground.

C. Tasks

WHO	TASKS
Capt Malloy	<ul style="list-style-type: none"> • Plan the sports event. • Book school facilities. • Deliver the safety briefing upon arrival. • Deliver the event's debriefing.
Lt Nixon	<ul style="list-style-type: none"> • Responsible for meal arrangements. • Responsible for all medical emergencies. First-aider for the event.
WO1 Mackey	<ul style="list-style-type: none"> • Responsible to ensure that equipment and signs are ready before 0840 hrs as per Annex C. • Responsible to ensure all activities are carried out safely and according to the timetable. • Responsible to have cadets divided into four sports teams.
WO2 Landry	<ul style="list-style-type: none"> • Responsible for the training and evaluation of all activity referees. • Offer feedback to activity referees. • Complete and submit an individual evaluation of all referees to the Training Officer.
FSgt Gagnon	<ul style="list-style-type: none"> • Responsible for the evaluation all activity referees. • Offer feedback to activity referees. • Complete and submit an individual evaluation of all referees to the Training Officer.
Sgt Penny	<ul style="list-style-type: none"> • Responsible for equipment set-up and tear-down • Become familiar with and referee soccer. • Become familiar with and referee volleyball.
Sgt Randell	<ul style="list-style-type: none"> • Responsible for equipment set-up and tear-down. • Become familiar with and referee soccer. • Become familiar with and referee volleyball.
Sgt Picard	<ul style="list-style-type: none"> • Responsible for equipment set-up and tear-down. • Become familiar with and referee ball hockey. • Become familiar with and referee badminton.
Sgt Clark	<ul style="list-style-type: none"> • Responsible for equipment set-up and tear-down. • Become familiar with and referee ball hockey. • Become familiar with and referee badminton.
Sgt Belliveau	<ul style="list-style-type: none"> • Responsible for set-up and tear-down. • Responsible to carry out the warm-up and the cool-down. • Responsible for the tug-of-war event.
All members	<ul style="list-style-type: none"> • All members are to look after safety. • Anything deemed unsafe should be stopped right away and rectified.

D. Timings

See timetable in Annex A.

E. Dress

Dress for the event will be suitable sports gear. No outdoor footwear shall be worn inside.

F. Rations

Rations will be arranged by Lt Nixon.

G. Accommodations

Arrangements for the school are to be made by Capt Malloy.

H. Equipment

See Annex B for Equipment List.

See Annex C for Activity Layout.

I. Transport

Cadets are responsible for their own transportation to and from the school.

J. Emergency Procedures

All medical emergencies will be reported to Lt Nixon. First aid will be available on site, and will be given if necessary. Medical emergencies will be directed to 911.

K. Water

Water will be available at school fountains. All cadets are to bring a personal water bottle to have water on hand.

L. Hygiene

The school washrooms (toilets and showers) will be available.

CHAIN OF COMMAND

Planning: Capt Malloy

Conduct: WO1 Mackey

Evaluation: WO2 Landry, FSgt Gagnon

Rations: Lt Nixon

First-Aider: Lt Nixon

Referees: Sgt Penny, Sgt Randell, Sgt Picard, Sgt Clark and Sgt Belliveau

Capt R Malloy

TrgO

123 Moncton

Distribution List

CO
DCO
Capt Malloy
Lt Nixon
WO1 Mackey
WO2 Landry
FSgt Gagnon
Sgt Penny
Sgt Randell
Sgt Picard
Sgt Clark
Sgt Belliveau

List of Annexes

Annex A - Timetable
Annex B - Equipment
Annex C - Exercise Layout

Annex A

TIMETABLE

Period	Time	What	Who	Comments
1	0810–0840 hrs	Set-up	All Sergeants	
2	0840–0900 hrs	Cadets arrival	All senior cdt's	
3	0900–0905 hrs	Attendance		
4	0905–0920 hrs	Exercise briefing	**YOU**	WO1 to divide teams at this time.
5	0920–0930 hrs	Warm up	Sgt Belliveau	
6	0940–1010 hrs	Game 1	Sgt Randell Sgt Penny	Soccer (Teams 1 vs 2) Volleyball (Teams 3 vs 4)
7	1010–1030 hrs	Break		
8	1030–1100 hrs	Game 2	Sgt Penny Sgt Randell	Soccer (Teams 1 vs 3) Volleyball (Teams 2 vs 4)
9	1100–1120 hrs	Break		
10	1120–1200 hrs	Game 3	TBD*	Soccer (Teams 3 vs 4) Volleyball (Teams 1 vs 2)
11	1200–1300 hrs	Lunch		
12	1300–1330 hrs	Game 4	Sgt Picard Sgt Clark	Hockey (Teams 1 vs 2) Badminton (Teams 3 and 4)
13	1330–1350 hrs	Break		
14	1350–1420 hrs	Game 5	Sgt Clark Sgt Picard	Hockey (Teams 3 vs 4) Badminton (Teams 1 and 2)
15	1420–1440 hrs	Break		
16	1440–1510 hrs	Game 6	TBD*	Hockey (Teams 1 vs 4) Badminton (Teams 2 and 3)
17	1510–1535 hrs	Tug of war	Sgt Belliveau	
18	1535–1545 hrs	Cool down	Sgt Belliveau	
19	1545–1600 hrs	Debriefing	Capt Malloy	
20	1600 hrs	Departure	All senior cdt's	

* Based on previous experience of both sports, determine who may need more practice and assign as appropriate.

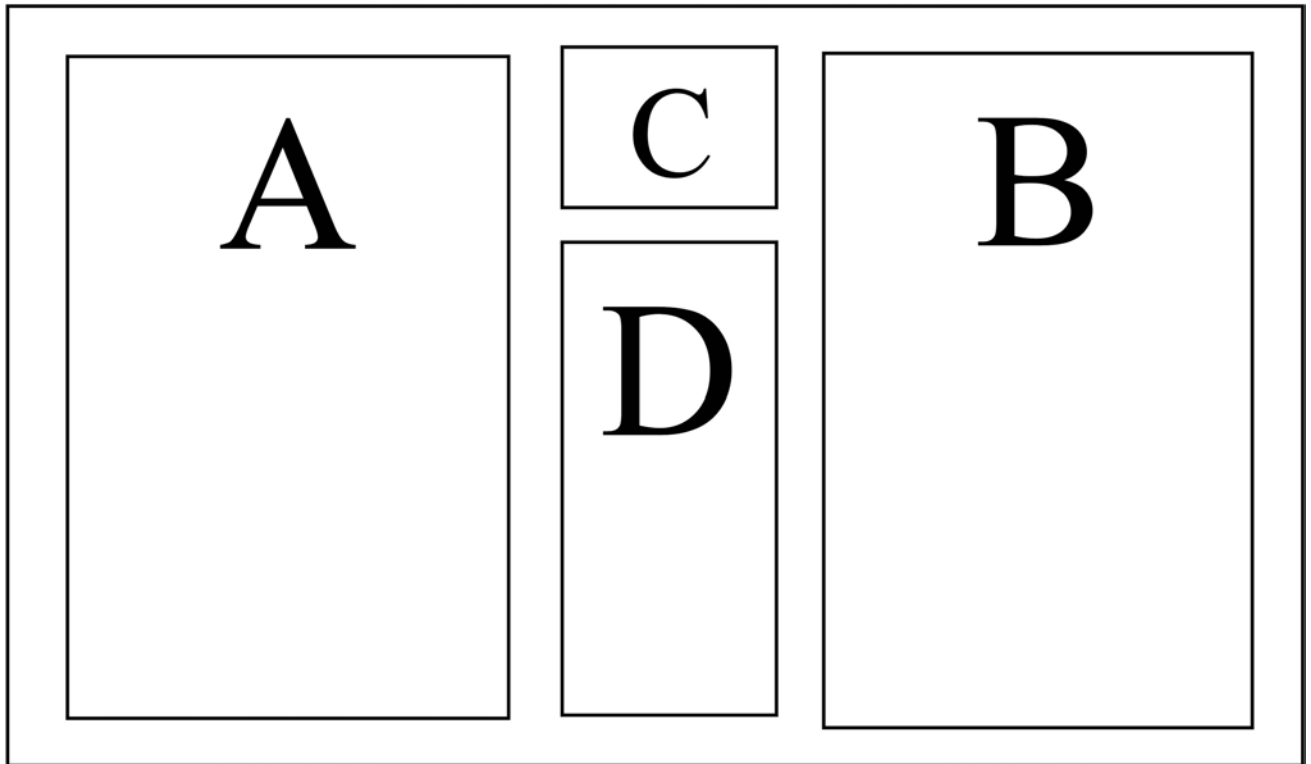
Annex B

EQUIPMENT LIST

- Hockey sticks x 20
- Hockey masks x 20
- Hockey gloves x 20
- Protective goggles x 20
- Hockey nets x 2
- Pucks x 2
- Badminton rackets x 20
- Badminton birds x 6
- Badminton sets (nets and poles) x 3
- Pinnies x 20 of each colour (2 colours)
- Volleyball set (nets and poles) x 1
- Volleyball ball x 2
- Large 18-m (60-foot) rope x 1
- First aid kit x 2

Annex C

EXERCISE LAYOUT



Legend:

A: Soccer / Hockey

B: Volleyball / Badminton

C: First Aid Station

D: Tug of War

THIS PAGE INTENTIONALLY LEFT BLANK