

## PLANNING RESERVE SUB-UNIT COLLECTIVE TRAINING (CT)

If troops are idle, last-minute lesson assignments are common, and you find yourself with inadequate time for battle procedure or random events muscling in on your unit schedule, it is possible that your training planning process needs a reboot. Planning good training is possible (and essential!) for Class A units, even in a unit that is well short of its established complement of officers and NCOs. It takes work, but it is a key chain of command responsibility and not something to delegate to the full-time support staff. Good early planning will pay dividends during the busy training year.

Not all units plan training poorly, but few do it consistently very well. This article will describe one way to plan ARes training. While this article is targeted at OCs, it may also be useful for other Coy/Sqn/Bty staff as well as unit Ops and Commanding Officers.

### Step 1 – Refresh Yourself on Your Deliverables

- a. Review the Unit (Level 4) Op Plan. The first step as an OC is to review your assigned tasks from your unit Op Plan. Confirm CO's direction and guidance for the exercise and which Battle Task Standards must be validated (if any). Next, coordinate with unit Ops to confirm exercise dates, resourcing, Trg area bookings, and constraints/restraints. Use all this information to conduct a brief mission analysis for your exercise objectives.
- b. Review Planning Protocol. Get onto DLN and review the following EOs from AJSO Mod 3 part 1, which will be a useful refresher for anyone who took AJSO more than a few years ago (or who raced through it rather than fully absorbing the content):
  - EO 003.01 - Lesson 3 - Lesson Implementation of Training Safety;
  - EO 003.01 - Lesson 4 - Range Control Responsibilities;
  - EO 003.01 - Lesson 5 - Battle Task Standards;
  - EO 003.01 - Lesson 6 - Plan Training (*especially this one*);
  - EO 003.02 - Lesson 4 - After Action Review (AAR); and
  - EO 003.02 - Lesson 5 - Assess Training.

Another great reference is B-GL-335-001, Decision making and planning at the tactical level.

- c. Gather the Battle Task Standards. Familiarize yourself with the assigned Battle Task Standards (BTS) for your corps / branch, which are reviewed and updated annually by CADTC. These are located on the Army CT ACIMS portal at:

<https://acims.mil.ca/org/ArmyCT/Approved%20Battle%20Task%20Standards/Forms/AllItems.aspx>

### Step 2 – Calendar Synchronization

Hopefully the exercises scheduled in your Level 4/Unit Op plan were scheduled after referring to the brigade synch matrix, as this will detail which weekends are set aside for the weekend Individual Training (IT) allowing you to avoid double-booking your staff.

Assuming they have been, begin with the end in mind – the Bde/Div summer training concentration and the BTS that will be confirmed thereon. Put all your scheduled exercises on a large calendar. Add everything that is known: exercise weekends, weekend IT, Remembrance Day, long weekends, mess dinners, COMREL events etc. Black out unit scheduled activities (those imposed by the CO) as this time will not be available to you for training. These might be drill practice before Remembrance Day, mandated training (ethics, CTAT, etc.). What's left will show what time is available for Coy training prior to each exercise. Close coordination with your unit Ops staff is essential from this step onward as they need many months notice to book ammo, Training areas, etc.

### Step 3 – Exercise Planning

#### General

Now focus on each of the weekend exercises. For each, you will need to create an Exercise Instruction made up of several supporting documents.

- General Instruction;
- Annex A – Schedule/Timetable;
- Annex B – Range Layout and Safety Instruction;
- Annex C – AAR Instruction;
- Annex D – Deployment and Redeployment Instruction;
- Annex E – BTS Validation plan (if applicable). Which BTS, validated by whom, how will this be reported (Monitor MASS?); and
- Annex F – Map Overlay/Traces (likely close hold until after tactical Op Orders are issued);
- Annex G – Tactical scenario & Coy Op Order (if applicable, close hold until issued).

Different formats for an Exercise Instruction are fine, but the key is to recognize that the instruction is not the tactical Op Order, but rather deals with the administrative plan for the exercise including ration plan, transport plan, porta-potty plan, etc. It builds an administrative box within which the training will occur. Thus, the mission paragraph of the General Instruction should not read 'seize Obj X' but rather 'practice platoons in the BTS of Execute an Attack.'

#### Planning Sequence

If multiple Coys will be exercised, then you can assume that your CO will direct the Ex and that unit Ops will issue the Ex instruction. Many weekend Exercises will be just Coy/Sqn/Bty Exs. For these, Ex planning will normally be done by the team of: OC, 2IC, CSM, and CQMS. Together, go through the following process:

1. After consulting with the CO, the OC (in consultation with CSM) outlines vision for Ex;
2. OC, 2I/C, CSM & CQMS conduct Ex recce (consider conducting all Ex recces in summer when unit training is paused and you (hopefully) have more time), or on a prior exercise during a tactical pause if time permits. If possible, bring your Reg F Ops WO or Ops O so that they

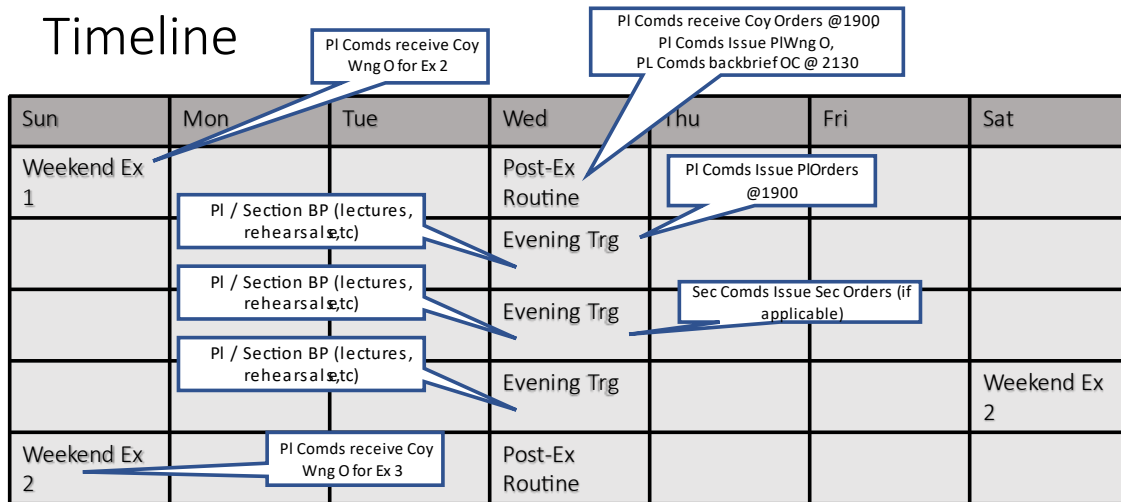
have a good idea of what will be occurring during the Ex. This will ensure that they will be able to better support the exercise and deconflict any potential issues between other units. More importantly, the full time Ops staff attend the periodic Bde Ops & Trg Coords (or their equivalent in your CBG) so they should be well read into future unit CT plans to ensure that your CBG and other units are tracking what you will be doing, and you are not planning in a vacuum. This will also help to enable joint opportunities and augmentation from other units (Medics/Sigs/Engineers) or seeking support to fill OPFOR tasks;

3. Coy 2I/C and CQMS draft the General instruction based on OC's vision for the Ex;
4. OC backbriefs the CO on the Ex Plan (after the recce and at least 90 days prior to the Ex);
5. 2I/C completes the Ex instruction (less annexes F & G) for the OC's review. As the instruction is being drafted, the 2I/C should be coordinating details with the unit Ops staff so that they can plan in parallel. At this point, any 'out of unit' stores TSRs should also be forwarded for staffing through your Unit Ops. If Trg is being validated, the 2I/C should ensure that a Monitor MASS event is created with the specific BTS to be validated during the exercise, and upon completion of the exercise ensure that the event is updated to reflect the soldiers who completed specific BTS, remembering that not every soldier will complete every BTS;
6. OC drafts the Op Order and the tactical scenario (if there is one) and Coy staff prepare any traces. These become annexes to the Ex instruction but are close hold until the OC issues orders. The tactical scenario should be consistent with the Decisive Action Training Environment (DATE)<sup>i</sup>. Ideally, you would use a general scenario that is consistent with what will be used for the annual concentration so that soldiers will be familiar with the enemy and general scenario before heading off to that exercise. If you're lucky, your CBG will have this roughed out well in advance, allowing you to use it;
7. The signed (by the Ex Dir/OC) Ex instruction should be given to unit Ops well before the exercise (~60 days) and can be made available to the PI at this time as well, so the PI staff have access to the admin details. You may also wish to give the tactical scenario (but not the orders / trace) out early so troops can become familiar with the general situation for the exercise. As described above, ideally the broad scenario is consistent for the whole training year. The tactical Op Order and trace annexes should only be issued after Coy orders; and
8. Ideally, plan to have a confirmatory recce shortly before the Ex to account for any potential changes to the training area due to weather, confirm or mark routes in/out, patrol bases, etc. This becomes particularly important for winter exercises, when using non-DND land, and for exercises which were recce'd in summer but executed in the fall or spring. This can be conducted by a member of the full time Ops staff such as Ops NCO.

#### Broad principles to follow when planning training:

- Employ Battle Procedure (BP). This is consistent with the principle of training of *Train to embody doctrine*. In addition to following the steps, you must respect the 1/3 : 2/3 rule;

- Coy/Sqn/Bty & below – use FMP / oral orders. Avoid PowerPoint, etc. unless these are digital solutions that you will have in the field. This is consistent with another principle of training, *Train as you fight*;
- The OC should build his/her vision for the Ex around ‘what war stories do I want the Junior Ranks to be discussing in the mess in the weeks after the exercise?’ The most memorable exercises are either very either challenging (push them but don’t break them), or where soldiers do something they’ve never done before. Memorable exercises drive retention and attendance on subsequent exercises;
- The CO should occasionally observe Coy/Sqn/Bty orders & provide developmental feedback to the OC;
- The OC should frequently observe PI orders & provide developmental feedback to PI Comds; and
- If we follow 1/3 : 2/3 rule, we should never issue Op Orders on the Friday night of an exercise because this leaves almost no time for subordinates to conduct their own battle procedure...So when should orders be issued?



Following this schedule will maximize the amount of time for your platoons and sections to conduct the battle procedure necessary to prepare for the exercise.

#### Step 4: Planning Weeknight Training

Now that your exercises are planned, you need to enable your platoons to craft the training nights that will lead up to those exercises. This is critical, and detailed planning at this stage will allow instructors to plan in advance and reduce the likelihood that soldiers will be standing around. A step that will enable this is the inclusion of a monthly ‘Leaders’ Night.’ The purpose of the Leaders’ Night is to allow

leadership (down to Sec 2I/C – soldiers don't attend) to plan in detail the subsequent month's training (until the next Leaders' Night). At this session, the PI 2I/C will assign any required lectures, stores or training aids can be booked / requested, lessons prepared by the tasked instructors, etc.

If we want our NCOs to deliver high quality instruction, we must provide sufficient notice and time to prepare. There are (at least) two options for this. Some units have an additional evening allocated for it. Others assign one training night per month for it, where soldiers either do not parade at all, or come in but conduct parallel training such as PT, Sports, or other activity that doesn't require supervision of more than one NCO.

Option A – Adding an Extra Leaders' Admin Night

## Option A – Leaders' Night Schedule

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Weekend Ex 1			Post-Ex Routine			
	Leaders' Night		BP			
			BP			
			BP			Weekend Ex 2
Weekend 2			Post-Ex Routine			

PI Comds receive Coy Orders @1900,  
 PI Comds Issue Pl Wng O,  
 PI Comds backbrief OC @ 2130

PL 2I/C assigns lessons, NCOs prep lessons, other Admin, Pl Orders issued (unless orders will be issued to entire Pl, not just Pl Leadership)

This option is preferred but if the extra day for leaders isn't feasible, the schedule below will also work.

## Option B – Leaders’ Night Schedule

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Weekend Ex 1	PI Orders issued, PI 2I/C assigns lessons, NCOs prep lessons, other Admin		Post-Ex Routine		PI Comds receive Coy Orders @1900, PI Comds Issue PI Wng O, PL Comds backbrief OC @ 2130	
			Leaders’ Night			
			BP	Troops do minimum supervision activity such as PT or Sports under the supervision of an NCO		
			BP			Weekend Ex 2
Weekend Ex 2			Post-Ex Routine			

The NCO supervising PT / sports should be identified at the previous Leaders’ Night in order to give them sufficient time to plan the activity. They must also be exempt from instructing a lesson in the upcoming cycle unless they are provided additional time to prepare it.

While the platoons will determine the training and other activities required to prepare for the exercise, the OC & CSM should take an interest in the plans the platoons come up with. The Coy 2IC and CQMS also have a role deconflicting resource requests between the platoons.

### Who Does What

Implementation of this system is easiest to do if championed by the CO but it can also be led / championed by the OC if the CO’s focus is elsewhere.

### CO’s Responsibilities

- Request that the BTS for the annual concentration are issued by the CBG staff early enough to plan preparatory BTS in the unit L4 Op Plan. Ideally, secure the general scenario and enemy narrative that will be used at the annual concentration and provide it to OCs early enough to use in Coy Trg;
- Ensure the unit Level 4 Op Plan contains necessary detail for Coy Ex planning (D&G to include CO’s intent, dates, BTS, Trg Areas, etc.) and that these exercises are scheduled when all required resources will be available (has all eqpt the unit provided to summer IT been returned, Exercises not scheduled during ATI, etc.);
- Ensure Unit Ops is involved in all planning;
- Ensure the unit Level 4 Op Plan lists dates for unit activities so Coys can plan around this (drill practice before Remembrance Day, Changes of Command, Regt’l birthday activities, etc.);
- Provide D&G to OCs prior to the Ex planning cycle, especially if your Level 4 Op plan has become dated or overcome by events;
- Ensure OCs backbrief the CO at ~90 days before the Ex;
- Ensure OCs lock in a date for Coy orders to PI Comds and observe Coy orders;
- Insist on the use of battle procedure, oral orders, and 1/3 : 2/3 rule;

- Leaders' nights are critical and must be protected. Insist that after every leaders' night, each period of weeknight Trg has been defined and its lessons assigned to an instructor so no time on a parade night is wasted;
- Expect to coach OCs until they are used to this system if this is a big change from current practice;
- Attend as many Exs as you can but give OCs space to do their jobs. Remember that doctrinally a CO normally has 4-5 OCs to supervise in the field, so even if you have just one, spend no more than 20-25% of the Exercise time 'visiting' any given company HQ / location. Spend the rest of the time observing training from a vantage point where you are not in the OC's space. As a CO, the author often came out on a Saturday afternoon to give the companies Friday night & Saturday morning to sort themselves out before appearing;
- For higher level exercises (e.g., where the OC will be exercised or exercises with multiple Coys), the unit Ops staff plans the ex following CO's direction, OCs should receive oral orders from the CO (or CO and Ops O), which should be supplemented with a written order/confirmatory notes plus the required annexes at least ~6 weeks before the Ex. Then OCs can issue orders IAW the calendar schedule above.; and
- Train and develop unit officers. Conduct timely TEWTs on the BTS to be exercised (and ensure these dates are in your L4 Op Plan so Coys are aware). It may be possible to conduct a TEWT after ENDEX is called, leaving the NCOs to conduct the necessary Admin prior to redeployment, or a table-top exercise once back in the armoury after an exercise while the NCOs conduct post-Ex drills.

#### OC's Responsibilities

- Receive and read the Unit L4 Op Plan along with any supplementary D&G from your CO;
- Ensure Ex Recces occur sufficiently early IOT backbrief the CO in sufficient time to tweak the plan as required;
- Mentor the Coy 2I/C in this process;
- Write and issue oral orders in a timeframe that respects the 1/3 : 2/3 rule; and
- Coordinate with Unit Ops staff throughout (through Coy 2I/C).

#### CSM's Responsibilities

- Ensure that lessons have been assigned during Leaders' Nights and stores requested; and
- Mentor the CQMS in this process.

#### Conclusion

This system can, and probably should, be tweaked to optimally suit each individual unit. A few parting thoughts:

- Hold a semi-annual 'training meeting' where all the Coy leadership (MCpl on up) is present and the OC explains this process, the calendar is examined to deconflict Unit activities, etc.
- Get creative. For example, treat IBTS stands and range exercises as battle procedure for a tactical exercise taking place four weeks later;

- Budget and time permitting, have OCs give PI Comds a Saturday Trg Day a couple of times per year and let the PI Comds decide what they want / need to practice (ensure they backbrief their OCs on their plan) and that they conduct a recce and write up a brief Ex instruction;
- Where feasible, plan for a 'Secondary Training Audience' for each exercise. These could come from your own (A1/A2 echelon), or another, unit. Just be sure this doesn't take away from the main effort: the training of the Primary Training Audience (PTA);
- Use SMP vehicles where possible in order to have your CSS elements practice Convoy BTS;
- Reduce initially issued ammo and rations to 1 day of supply to exercise your unit / Coy resupply chain during the Ex;
- Look for opportunities to combine / co-locate / interact with other units & arms in the field. Even at a low level there is often utility in working with other units, e.g., Engr support for an obstacle crossing. This takes considerable notice and coordination in advance but increases the 'memorable-ness' of Exs;
- Where appropriate and permitted, have affiliated Cadet Corps send senior cadets to observe occasional exercises and task HQ or Adm Coy to conduct a CAF Familiarization; and
- If / when you want to showcase your Ex, ensure the Unit Public Affairs Officer or the Bde PAO visits / attends the Ex. Maybe invite the CFLC folks. Or a local reporter (they could join a tent group on a winter Ex). Again, ensuring this doesn't detract from training the PTA.

Hopefully you have taken one or two nuggets from this article. If anything in here is unclear or you believe something should be added feel free to contact the author at [matthew.haussmann@forces.gc.ca](mailto:matthew.haussmann@forces.gc.ca).

The author is indebted to the many fine officers and NCOs who provided input and feedback during the writing of this article.

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<sup>i</sup> One example from which scenarios can be drawn can be found at: [https://acims.mil.ca/sp/3CdnDiv\\_Simulation\\_Centre/Generic%20CBG%20DATE%20CAX/Forms/AllItems.aspx](https://acims.mil.ca/sp/3CdnDiv_Simulation_Centre/Generic%20CBG%20DATE%20CAX/Forms/AllItems.aspx).