

GUARD DIRECTIVE 005
REGIMENTAL PLANNING:
PROCESS AND RESPONSIBILITIES

Approved 29 Jan 17

GENERAL

1. A key element in achieving the Regimental Vision, Mission and Objectives is planning. The PPCLI has always had a planning process, and needs to keep that process relevant and well understood.

PURPOSE

2. The purpose of this directive is to outline the planning process and planning responsibilities for Regimental matters in the PPCLI.

CONCEPT

3. Planning in the PPCLI occurs on three levels: strategic, operational and tactical. This is in consonance with army planning and provides continuity with other national planning systems.

4. Planning in the PPCLI is two-directional, being both top-down for major activities and bottom-up for lesser or more local events. For all major activities, the serving component works in *direct partnership* with the Association and Foundation to achieve the assigned tasks or mission on behalf of the entire Regimental Family. Normally, this means that planning will also be partnered at all levels.

5. Generally, the REC is the central cog in regimental planning, as all initiatives or projects that require regimental resources – dollars or the work of soldiers of more than one unit – need to go through the REC who alone authorizes expenses. All issues or initiatives that involve long-term commitment, or the involvement of the Colonel-in-Chief, or which are or may be sensitive at the national level, need the attention of the Guard.

6. While no specific timetable is established, the key annual document in the top-down planning element is the Regimental Operating Plan which is published each January, and which includes the Mission, Vision, Objectives and sub-objectives for that calendar year, the five year calendars for the Regiment, and RHQ, museum and financial plans. Work on this annual edition commences in about October annually.

PRINCIPLES

7. The Regiment is judged not only by its great history, but also by all of today's and tomorrow's exploits and undertakings. Each one should be characterized by the hallmarks of excellence that we attribute to our Founder. That excellence is founded on clarity of purpose, high standards and flawless execution.

8. The Regiment undertakes every project with full purpose and energy. There are no half measures, especially in planning. Coordination is key to ensuring soundness of planning.

9. Coordination takes time, and Regimental planners should err on the side of early rather than later planning starts. The past has shown that important decisions that commit the Regiment need time to be developed through the Regiment's committee system. Almost every important decision has an element of controversy in it, and the building of consensus about the right course of action also takes time in a diverse family. Early identification of projects, policy issues and initiatives is important to the proper functioning of planning within the Regiment.

10. The serving component and the Association are full partners in achieving the mission and objectives of the Regiment. They must also be full partners in planning for that achievement.

STRATEGIC PLANNING

11. For major events that are likely to involve all three entities of the Regiment, the Regimental Steering Committee (RSC) will convene to coordinate activities. Once the division of responsibilities has been decided upon, the RSC will hand over to the Guard. The Guard, with its integrated serving/retired representation and with the involvement of the Colonel of the Regiment and through that person, the Colonel-in-Chief, will detail the policy, long-range planning and coordination required to execute the project. RHQ will provide staff support, while the Regimental Association Council and a tasked sub-committee of the PPCLI Foundation will assist in the planning. The Vice-President Strategy (VP Strat) will be responsible for maintaining the Regimental Strategy, which will be reviewed annually by the Regimental Guard and as required by the Regimental Steering Committee.

12. The Guard ties its planning into the major celebrations that occur within the life of the Regiment, and in the routine changes of appointments and command that mark the pulse of change. Additionally, the Guard integrates the Regiment's interests with the broad changes that occur in the Army and the CAF, and plans accordingly to ensure the continuity and relevance of the Regiment. It coordinates Regimental activities with other national bodies, government departments and regiments as needed, and identifies coordination responsibilities to RHQ.

13. Most importantly, the Guard confirms the Regimental Vision, Mission and Objectives periodically during Strategic Planning Sessions. These elements of the strategic plan, together with the regimental selections for senior command and unit appointments, represent the essence of Regimental strategic planning.

14. The Guard publishes the Regimental Vision, Mission and Objectives in the Regimental Manual and annually in the Regimental Operating Plan. As well, it publishes minutes of the meetings of the Guard, Policy Directives and selected specialized instructions, such as the Regimental Funeral Plan. Publication and file management is executed by RHQ.

OPERATIONAL PLANNING

15. Operational planning is done by the REC and its committees and by the Executive and other committees of the Regimental Association. Operational planning provides sufficient detail and resources for the successful development of tactical plans for execution, within the strategic planning context established or endorsed by the Guard or the Association Council. This level of planning identifies specific responsibilities for execution, assigns Regimental resources and coordinates activities with provincial, municipal and local organizations and supporting bodies. The Foundation will be kept informed of all plans in order to track resource requirements.

16. The REC provides the detail contained in the annual Operating Plan, its detailed sub-objectives under the Regimental Objectives, the financial plan for the Regiment and the planning calendars out to five years. The REC approves the five-year operating plans for the Museum and Archives and the plans for RHQ. The minutes of the REC are a record of its planning as necessary. The representation of the Association and Foundation on all committees of the REC ensures mutually supported and agreed operational level planning.

TACTICAL PLANNING

17. Units, Regional Representatives and Association branches plan at the tactical level, where specific tasks and missions are executed with assigned or available resources. Planning at this level is marked by a strict attention to detail to ensure a militarily proper and fully coordinated effort between serving and Association resources, effective control and excellent results.

18. Tactical plans are usually turned into orders or instructions appropriate for each event. A key component of success at the tactical level is keeping all those involved informed, and this should occur in the planning stages at this level as an important element of preparation for success. This includes establishing close cooperation between the local Association branch(es) or members, and the local serving component.

SUMMARY

19. Planning is an important Regimental activity, and it follows a pattern and a process. The Regiment relies upon thorough planning at all levels to achieve excellence in all its undertakings.