

**BY ORDER OF THE COMMANDER
JOINT BASE ELMENDORF-
RICHARDSON (PACAF)**

**JOINT BASE ELMENDORF-
RICHARDSON INSTRUCTION 10-409**

14 JANUARY 2020



Operations

INSTALLATION PLANS PROGRAM

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

ACCESSIBILITY: Publications and forms are available on the e-Publishing website at www.e-Publishing.af.mil for downloading and ordering

RELEASABILITY: There are no release restrictions on this publication

OPR: 673 ABW/XP

Certified by: 673 ABW/DS
(Mr. Donald Weckhorst)

Supersedes: JBELMENDORF-RICHARDSONI
10-409, 23 February 2017

Pages: 26

This instruction implements AFPD 10-4, *Operations Planning: Air & Space Expeditionary Force (AEF)*, and is used in conjunction with planning guidance from other major command (MAJCOM), Air Force, or Department of Defense (DoD) directives. The purpose of this publication is to provide guidance for wing and unit plan office of primary responsibility (OPR) and plans representatives to manage and operate their unit-written plans. It outlines plan requirements, formatting and the local JBER development and review process. It applies to all 673d Air Base Wing (673 ABW) and 3d Wing (3 WG) units developing or maintaining planning guidance that impacts Joint Base Elmendorf-Richardson (JBER) organizations. This publication applies to the Air National Guard, Air Force Reserve, and Civil Air Patrol units and members. Compliance with this instruction can only be waived as noted below. The authorities to waive wing/unit level requirements in this publication are identified with a Tier ("T-0, T-1, T-2, T-3). This publication may not be supplemented at any lower level. Refer recommended changes and questions about this publication to the Office of Primary Responsibility (OPR) using the AF Form 847, *Recommendation for Change of Publication*; route AF Forms 847 through the appropriate functional chain of command. Ensure that all records created as a result of processes prescribed in this publication are maintained in accordance with Air Force Manual 33-363, *Management of Records*, and disposed of in accordance with the Air Force Records Information Management System (AFRIMS) Records Disposition Schedule (RDS). See **Attachment 1** for a Glossary of References and Supporting Information.

SUMMARY OF CHANGES

The checklists in **attachment 2** were streamlined, all links to the JBER SharePoint were updated, and minor administrative changes were made to align this instruction with CJCSM 3130.03A, *Planning and Execution Planning Formats and Guidance*, 4 February 2019.

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1. General Plans Program Guidance

1.1. **Program Requirement.** Most units on JBER are routinely involved with planning for contingencies that could impact JBER missions. Many JBER units maintain planning guidance for deploying personnel and equipment to support contingencies away from the installation. Often the unit representatives appointed as OPRs for plans have little to no experience in this additional duty assignment. This instruction was developed to provide units the tools needed to effectively manage and operate plans programs. It includes program resources and provides concise step by step procedures to follow when developing a new plan, reviewing an existing plan, and staffing a plan.

1.2. Operational Context:

1.2.1. Operational Focus. The goal of organizational planning is establishing local procedures and guidelines to optimize mission effectiveness. The Director of JBER Plans and Programs (673 ABW/XP), Wing Plans Officers (673 ABW/XPX), and unit-level plan OPRs will collaborate to draft, coordinate and publish effective local plans to meet the mission requirements of JBER-based units. **NOTE:** Local plans must contain JBER-specific information and procedures, rather than general material copied from HHQ guidance. JBER Plans should answer the question: “how do we do that at JBER?”

1.2.2. Operational Effectiveness. Organizational-level planning requires dedicated individuals who will analyze, prepare, draft, and revise operational procedures into written documents. Plans must be coordinated through subject matter experts (SME) to ensure accuracy, staffed through leadership for approval, and disseminated to all tasked or supported organizations.

1.3. **Security:** Protection of plans, checklists and plans correspondence is vital to the security of operations. All plan OPRs must remain aware at all times of the need to safeguard both classified and critical information.

1.3.1. Operations Security (OPSEC). Plan OPRs must incorporate a strong sense of OPSEC responsibility into all Unclassified plans and checklists and clearly mark plans containing critical information as “UNCLASSIFIED//FOR OFFICIAL USE ONLY”. Unclassified FOUO emails must be encrypted.

1.3.2. Classified Plans. Plan OPRs for classified local plans must ensure that they are clearly labeled and marked IAW DoD 5200.01, Volume 2. Unclassified SSSs, and administrative tasking/tracking emails for classified plans can be maintained on and sent via NIPR, but all content-based coordination must be accomplished via SIPR for CONFIDENTIAL or SECRET plans.

1.4. Roles and Responsibilities:

1.4.1. The 673 ABW Commander will:

1.4.1.1. Ensure a viable plans program is established through the JBER Director of Plans and Programs, 673 ABW/XP, to support all JBER organizations and missions.

1.4.1.2. Establish command relationship and coordination protocols across multiple wing and/or equivalent-level commands.

- 1.4.1.3. Ensure plans assessments are conducted annually, and as needed, to ensure compliance with higher headquarters (HHQ) guidance and this instruction.
- 1.4.2. Unit Commanders and Wing Staff Agency Chiefs will:
 - 1.4.2.1. Establish unit-level procedures for the review, continuous improvement and approval of all local plans. This will require plans reviewers who are both thoroughly familiar with the unit's operations, and how their unit supports and is supported by other JBER units. While this does not require a formal unit plans representative program, should a unit commander decide to appoint a unit plans representative, 673 ABW/XP is prepared to train unit plans representatives at the request of unit commanders.
 - 1.4.2.2. Appoint OPRs for all plans written by their organization.
 - 1.4.2.3. Ensure unit plan OPRs fully incorporate their plan into all functional areas.
 - 1.4.2.4. Ensure Unit-owned plans are reviewed at least annually to ensure compliance with HHQ guidance and this instruction.
- 1.4.3. The Director of JBER Plans and Programs (673 ABW/XP) will:
 - 1.4.3.1. Manage JBER plans through Wing Plans Officers (673 ABW/XPX).
 - 1.4.3.2. Advise and represent the commander on all plans-related matters, to include developing and recommending plans policy and guidance.
 - 1.4.3.3. Maintain this instruction to provide JBER-based units with the specific plans protocols essential for effective updating and publication of JBER plans.
 - 1.4.3.4. Develop and maintain classified and unclassified JBER Plans E-Libraries on the JBER SIPR and NIPR SharePoints. **NOTE:** 673 ABW/XP will also privately maintain Word versions of all approved plans for use by plan OPRs in the annual review process. Plan OPR's must use these copies rather than any personal copies they have retained, for plan review and updating.
 - 1.4.3.5. Upon unit commander request, train any unit-level plans representatives on duties and responsibilities listed in this instruction.
 - 1.4.3.6. Review plans periodically for currency and update (as necessary) to remain in compliance with current directives.
 - 1.4.3.7. Review and approve all base/wing-level operations/contingency/associate plans before final publication and distribution.
 - 1.4.3.8. Ensure proper notification of all appropriate functional areas when plans are modified or rescinded.
 - 1.4.3.9. Ensure all plans are tracked and suspense are being met. Notify all plan OPRs of any delays in meeting suspense.
 - 1.4.3.10. Establish an effective wing plans annual review program in accordance with **Paragraph 5**, this instruction. Brief the review schedule quarterly at the JBER Commander's staff meeting.

1.4.3.11. Have access to the Secret Internet Protocol Router Network (SIPRNET), Non-Classified Internet Protocol Router Network (NIPRNET), and organizational e-mail accounts.

1.4.4. Wing Plans Officers (673 ABW/XPX) will:

1.4.4.1. Serve as the primary POC for all unit-level plan OPRs for the drafting, review, updating, coordination and approval of JBER plans. **NOTE:** Wing Plans Officers will initiate the annual review process by notifying unit-level plan OPRs 30 days prior to the one year anniversary of plan approval, and provide unit-level plan OPRs with clean Word format copies of the plans to be reviewed.

1.4.4.2. Serve as the plan OPRs for the following JBER Plans:

1.4.4.2.1. JBER Chemical Weapons Convention (CWC) Plan.

1.4.4.2.2. JBER Giant Net Support Plan.

1.4.4.2.3. JBER Installation Control Center (ICC) Plan.

1.4.4.2.4. JBER Open Skies Treaty Support Plan.

1.4.4.2.5. JBER Recovered Chemical Weapons (RCW) Plan.

1.4.4.2.6. JBER Render Safe Support Plan (S).

1.4.4.3. Maintain and provide to the 673 ABW/XP records custodian (RC) for filing, the following documents for all approved plans for which they are OPRs, or primary POCs:

1.4.4.3.1. Clean, final versions of all plans in both Word and PDF formats.

1.4.4.3.2. Consolidated Comment Review Matrices (CRMs).

1.4.4.3.3. All signed JBER plan coordination SSSs.

1.4.4.4. Maintain, and update as required, on the 673 ABW/XP NIPR and SIPR SharePoint for unit plan OPRs:

1.4.4.4.1. A set of Word format plan, and required plan memoranda, templates.

1.4.4.4.2. Current USAF/DoD-approved plan writing guidance.

1.4.4.5. Serve as primary JBER SMEs on matters relating to the execution of HHQ OPLANS and CONPLANS during wartime, emergencies or actual deployments.

1.4.5. Unit-Level Plan OPRs:

1.4.5.1. Manage unit-level plans.

1.4.5.2. Provide unit-level assistance and guidance on plans matters.

1.4.5.3. Review plans periodically (at least annually) for currency and update (as necessary) to remain in compliance with current directives. **NOTE:** For all unit-level plan OPR-initiated (out of cycle) plans reviews, request a clean Word format copy of the plan to be reviewed from the appropriate Wing Plans Officer.

1.4.5.3.1. Notify 673 ABW/XPX of the intent to produce, change or rescind a local plan. Provide any known requirement (HHQ directive, AFI change, etc.) to do so.

1.4.5.3.2. Accomplish all plan preparation, review, revision, Comment Review Matrix (CRM). Adjudication with other agencies in accordance with this instruction.

1.4.5.4. Comply with the security procedures in **Paragraph 1.3**, this instruction, when creating or updating classified plans, checklists, or other plans material.

1.4.5.5. Ensure all assigned plans are tracked and suspense are being met. Notify 673 ABW/XPX of any delays in meeting any suspense.

1.4.5.6. Have access to SIPRNET, NIPRNET and organizational e-mail accounts.

1.4.6. Unit Plans Representative (Optional). Commanders of units may designate a plans representative to coordinate multiple unit-level plans, advise and represent the commander on plans related matters, coordinate with 673 ABW/XP on matters pertaining to HHQ and/or JBER plans tasking or supporting their unit, and other duties as directed. 673 ABW/XP is prepared to train unit plans representatives at the request of unit commanders.

2. Plan Process. Follow the guidance in this section, and throughout the instruction, to ensure a smooth transition from plan development or review through plan completion. All plan OPRs will consult the assigned Wing Plans Officer, AF and HHQ directives and/or guidance before drafting, revising or rescinding a plan to ensure compliance.

2.1. Plan OPR Determination. The OPR is determined by the source document requiring the plan or as directed by the JBER unit with the responsibility for the plan. The OPR will be responsible for overseeing development and coordinating with the assigned Wing Plans Officer for proper staffing.

2.2. Plan Review. OPRs will annually review their plan(s) and plans that impact their plan(s), to ensure they are in compliance with current directives, regulations and/or guidance set by the wing and/or HHQ. Local plans are written to provide JBER-specific information and procedures, rather than general material copied from HHQ guidance. JBER Plans should answer the question: “how do we do that at JBER?”

2.3. Plan Development and Revision. Plan OPRs are responsible for developing formatting and updating the plan(s) for which they are the designated OPR (see **Paragraphs 3, 4 and 5**, this instruction).

2.4. Plan Coordination Package. (See **Paragraph 6** this instruction.) The plan OPR will prepare and forward the draft plan to 673 ABW/XPX. XPX will prepare coordination packages (bottom-line and top-line coordination) that include:

2.4.1. Staff Summary Sheets (SSS).

- 2.4.1.1. For bottom-line coordination, 673 ABW/XP will generally prepare three eSSSs, one for 673 ABW and 3 WG groups, one for 673 ABW and 3 WG WSAs, and one for affected USAF and USAF total force JBER tenants. These will be posted on the JBER SharePoint. If non-USAF supported or Tenant unit coordination is required a fourth eSSS will be written and sent to the appropriate POC(s) via email, or transferred via the AMRDEC SAFE webpage (<https://safe.amrdec.army.mil/safe/>).
- 2.4.1.2. For top-line coordination 673 ABW/XP will prepare SSSs for both active-duty USAF wings, and the coordination will be routed “in-turn” from the supporting wing to the supported wing. **NOTE:** SSSs for the 3 WG will be electronic and sent via email. SSSs for the 673 ABW will be hard copy, and hand-carried in a folder.
- 2.4.2. DRAFT plan.
- 2.4.2.1. For bottom-line coordination 673 ABW/XP will post a PDF copy of the Draft Plan on the JBER SharePoint. If non-USAF supported or Tenant unit coordination is required a PDF copy will be sent to the appropriate POC(s) via email, or transferred via the AMRDEC SAFE webpage (<https://safe.amrdec.army.mil/safe/>).
- 2.4.2.2. For 3 WG top-line coordination 673 ABW/XP will email a PDF draft with the eSSS.
- 2.4.2.3. For 673 ABW top-line coordination the PDF Draft will be cut to a disk to accompany the hard copy SSS, and hand-carried in a folder.
- 2.4.3. All previously signed SSSs (Only for Top-line coordination). **NOTE:** Signed SSSs will be consolidated as a single PDF file. For the 3 WG this consolidated file will be sent via email; for the 673 ABW it will be cut to a disk to accompany the hard copy SSS, and hand-carried in a folder.
- 2.4.4. Comment Review Matrix (CRM).
- 2.4.4.1. For bottom-line coordination 673 ABW/XP will send a blank CRM with the email tasking the review.
- 2.4.4.2. For top-line coordination 673 ABW/XP will provide a Consolidated CRM including comments and adjudication of all previous inputs either via email (3 WG) or disk (673 ABW). **NOTE:** All additional top-line comments will be added to this CRM by the wing executive officers.
- 2.5. Coordination **Timeline:** The Wing Plans Officer will confer with the OPR on establishing a suspense for their plan, but in general the suspense in the matrix below will be used.
- 2.5.1. Use the plans timeline matrix in **Table 1**, this instruction, to set a reasonable timeline for development, revision, coordination to final signature. Reasonable target times are listed. Plan OPRs may request longer or shorter times as appropriate.

Table 1. Timeline Matrix.

Phase	Action	Target Time
Drafting a Plan	Research, Draft plan and Review	8 weeks (or as coordinated by plan OPR)
Bottom-line Coordination	Review and Adjudication (through all appropriate organization and/or units). Final review/signature by group commanders, WSA chiefs, and tenant unit commanders	4 weeks
Top-line Coordination		
	Review and Adjudication by supporting wing command staff and supporting wing commander's signature (SSS)	2 weeks
	Review and Adjudication by supported wing command staff and supported wing commander's signature (SSS and base plan)	2 weeks
Target Time		4 months

2.5.2. Once set, reviewers must request extensions if they are unable to meet their suspense. Extension requests must include justification and new proposed date. They should be made no later than ten duty days prior to the original suspense. Plan OPRs in conjunction with Wing Plans Officers will grant or turn down these requests. **NOTE:** Extensions will be granted to the requesting units only. All non-requesting units must make the original suspense. **NOTE:** In the unlikely event that a plan spends an entire year in coordination, the unit-level plan OPR will accomplish a review of the draft to determine if it is still in compliance with current directives, regulations and/or guidance set by the wing and/or HHQ, and essentially correct and useable as written. If so, it will continue the coordination process through signature, if not it will be withdrawn from coordination for update, and once updated, go back to bottom-level coordination.

2.6. Plan Distribution:

2.6.1. Once a plan has been approved and signed by the applicable commander(s), 673 ABW/XP will post the plan to the appropriate JBER plans e-library in PDF format. **NOTE:** 673 ABW/XP will also privately maintain Word versions of all approved plans for use by plan OPRs in the annual review process. Plan OPR's must use these copies rather than any personal copies they have retained, for plan review and updating.

2.6.2. The 673 ABW/XP will inform the plan OPR via e-mail of the new plan posting.

2.6.3. Functional areas will access the appropriate master plans e-library to view or obtain a copy of the plan for use.

2.6.4. Any unit unable to view or obtain a copy of a plan via e-library may request a copy through 673 ABW/XP.

2.6.5. Reproduction. Generally, the plan will be made available to all units via the appropriate e-library, however if a unit requires a hard copy the plan may be printed. **NOTE:** It is recommended that all JBER functions maintain a hard copy, or a copy on disk, of any plans listed as “vital records” in their file plans. Ensure plans are stored appropriately based on their classification in accordance with DoD 5200.01, Volume 3, Enclosure 3, DoD Information Security Program, and AFI 16-1404, Air Force Information Security Program.

3. Formatting JBER Plans.

3.1. **Purpose.** Uniform formatting ensures all locally-written plans are immediately usable by a wide variety of JBER personnel.

3.2. General Formatting Guidance.

3.2.1. AFMAN 10-409-O directs the use of the administrative instructions and format contained in CJCSM 3130.03A for supporting plans. Except as noted below, 673 ABW/XP will use and enforce the formatting in CJCSM 3130.03A, the most current version of which is posted on the 673 ABW/XP SharePoint here: JBER Plan Guidance. This guidance is reflected in the plans templates at the same link.

3.2.2. To avoid undue delays in getting the latest local guidance to plan users, 673 ABW/XP is willing to help the plan OPR correct or update formatting, and/or take an incremental (multi-year) approach to bringing large local plans into compliance with CJCSM 3130.03A. Unit-level plan OPRs should use the templates available on the 673 ABW/XP SharePoint as a starting place. First copy the templates to your hard drive though to avoid inadvertent changes to the templates. **NOTE:** This document is formatted as an “instruction” and should not be used as a model or example for drafting or formatting JBER “plans”.

3.2.3. If JBER Plans are required by AFI or other HHQ guidance to deviate from the formatting in this instruction, Plan OPRs should use the memo template here: Request for Format Waiver, to request a deviation from JBERI 10-409.

3.3. Marking.

3.3.1. Unclassified.

3.3.1.1. Unclassified plans containing critical information are considered For Official Use Only (FOUO) and need to be marked accordingly. Mark plans containing FOUO information “UNCLASSIFIED//FOR OFFICIAL USE ONLY” at the top and bottom of the front/back covers and on all pages (excluding blank pages) of the plan. Use 12 pt. Times New Roman font and center the text as the top line of the header, or bottom line of the footer.

3.3.1.2. Unclassified plans not containing any critical information need not be marked at all, unless stored with classified material.

3.3.2. Classified. See AFI 16-1404 for marking classified plans. Use 12 pt. Times New Roman font and center the classification as the top line of the header, or bottom line of the footer.

3.3.3. Covers will have “(INTENTIONALLY BLANK)” printed on the reverse side.

3.3.4. Headers and Footers. Use 0.3” as the spacing from top/bottom, and 12 pt. Times New Roman font for headers and footers.

3.3.4.1. Headers. Headers before the security instructions page will consist of either just a clearance line or a clearance line over standard 673 ABW letterhead in the case of the Memorandum of Transmittal. Starting with the security instruction page, the header (below any classification line) will be right justified and consist of the following four lines:

3.3.4.1.1. Abbreviation for the appropriate wing (“673 ABW”, or “3 WG”)

3.3.4.1.2. JBER, AK 99506

3.3.4.1.3. The plan date IAW **Paragraph 3.10** below.

3.3.4.1.4. One blank 12-pt line

3.3.4.2. Footers. Starting with the Memorandum of Transmittal page, the footer (above any classification line) will be a centered page number IAW **Paragraph 3.4** below.

3.4. Page and Paragraph Numbering.

3.4.1. Page Numbering. Pages are numbered at the bottom center to indicate the page order in each element of the plan. The main body of the plan will follow the standard i, ii, 1, 2 numbering system below.

3.4.1.1. Pages Prior to the Base Plan. Lower case Roman numerals (the “i” page numbering system) will be used for numbering the Letter of Transmittal page through the Table of Contents.

3.4.1.2. Base Plan. The base plan uses standard numbering format beginning with number 1.

3.4.1.3. Attachment Numbering. Annex, appendix, tab, and exhibit pages use the following format: C-1-A-2-3 (denotes page 3 of Exhibit 2 to Tab A to Appendix 1 to Annex C).

3.4.1.4. Current practice is for plans to be maintained digitally, however if a hard copy of the plan is anticipated then each new section (memorandum of transmittal, plan summary, base plan, annex, appendix, and so forth) must start on an odd page. Pages marked “(INTENTIONALLY BLANK)” may be inserted as required to ensure this happens.

3.4.2. Paragraph Numbering. Designations for subdividing, numbering, and lettering paragraphs are “1.”, “a.”, “(1)”, “(a)”, “1.”, “a.”, [1] and [a] respectively. Indent each progressive subdivision 2/8s of an inch. When a paragraph or section is subdivided, it must have at least two subdivisions. Remember, you cannot have an “a.” without at least a “b.” or a (1) without a (2), etc. Though not standard, some HHQ planning instructions may require the numbering format to be like this instruction, that is, “1.”, “1.1.”, “1.1.1.”, and “1.1.1.1.”. Do not indent if you are using this numbering scheme. **NOTE:** Numbering paragraphs “1.”, “1.1.”, “1.1.1.” ... still requires a 673 ABW/XP approved waiver IAW **Paragraph 3.2.3** above.

3.5. Rules for Capitalizing and Underlining.

3.5.1. References to specific annexes and other attachments within the text are in this format: “Annex G”. All caps formatting for parts of a plan (e.g. “ANNEX G”) are only used in heading lines, and in the Table of Contents in the case of annexes (though not appendices or tabs).

3.5.2. Major numbered paragraph titles are capitalized, underlined, and followed by a period, e.g.: “1. Purpose.”

3.5.3. Subparagraph titles are capitalized, underlined, and followed by a period, e.g.: “a. Assumptions.”

3.5.4. Sub-subparagraph titles and below are capitalized, and followed by a period, but not underlined, e.g.: “(1) Designations.”

3.6. **Font Style and Text Spacing.** Use 12 pt. Times New Roman font. Single space text with a blank 12-pt line between each paragraph. Use two spaces after every period or colon, and one after a closed paren.

3.7. **Automatic Formatting.** With the exception of page numbering, plans drafts with any automatic formatting will not be accepted by 673 ABW/XPX for coordination.

3.8. **Notes.** Any “notes” included in the text will be formatted as follows:

3.8.1. The word “note” will start a new line, be bold, all capitals and followed with a colon (“**NOTE:**”)

3.8.2. The contents of the note will be in normal sentence case, and not bolded.

3.8.3. The note section will be offset 0.2” left, and 6 pts below the previous line, and separated by a normal 12 pt. empty line from the next paragraph.

3.9. **Checklists.** Whenever possible, checklists will be presented on an AF Form 2519, and grouped in Annex X. See 673 ABW/XP SharePoint for template: AF Form 2519 Checklist.

3.10. **Dates.** Each separate section of a plan must bear the date of issue or revision. Until a plan is revised, all sections should bear the same date of issue. The format will be a one or two digit day, the month spelled out without abbreviation and a four digit year. If used in a checklist (AF Form 2519) the month will be abbreviated to three letters, and the year will be abbreviated to two digits.

3.11. **Abbreviations.** The first time a title or designation is used it must be spelled out and immediately followed by the approved abbreviation, (e.g. “Joint Base Elmendorf-Richardson (JBER)”). After the initial spell-out and abbreviation, the abbreviation can be used thereafter. If a plan OPR believes an abbreviation is not well known or widely used, they may spell it out followed by the approved abbreviation on the first use per section, but this is not required.

3.12. **Identifying Plans.**

3.12.1. Titles. All JBER plans are assigned a title describing their purpose. If a short title or abbreviation is given, it must be unique, and if it is not inherently unique, the OPR's unit will be added. A good example of an ambiguous short title is "JBER IDP", which could mean either "Installation Deployment Plan" or "Integrated Defense Plan". To avoid ambiguity, the short titles assigned to these plans are "JBER LRG IDP", and "JBER SFS IDP" respectively.

3.12.2. Plan Identifying Numbers. A number will be added if a JBER Plan supports a numbered USAF or HHQ plan, or if a number is specified by HHQ directives. Additionally, local plans that have historically been numbered may retain those numbers at the OPR's discretion, especially when the plan is generally referred to by number locally.

3.13. Plan Organization. Write JBER plans in the format described in this instruction including the following elements in the order listed unless otherwise prescribed by HHQ. Sample plan formats and administrative details are provided at: JBER Plan Guidance. Deviations should be kept to a minimum to maintain standardization. Even in the case of a HHQ or AFI required deviation to the format given in this instruction, the plan OPR must request a formatting waiver from the Director of JBER Plans and Programs as per **Paragraph 3.2.3**, above.

3.13.1. Plan Cover. The front cover must show the plan date, issuing headquarters, long title, and plan number if applicable. The front and back covers of the plan will be properly marked in accordance with **Paragraph 3.3**, this instruction. See the Title Page JBER Plan, Title Page 3 WG Plan, or Title Page Unit-Level Plan for the appropriate plan cover template.

3.13.2. Memorandum of Transmittal. The memorandum of transmittal should identify the reason for preparing the plan, and list any plans or versions of the plan superseded by the new plan. The OPR for the plan must be identified by office symbol. The memorandum of transmittal is numbered as Roman numeral 1 ("i"), prepared on JBER letterhead, and has the signature block of the Director of JBER Plans and Programs. See the Memorandum of Transmittal template.

3.13.3. Security Instructions and Record of Changes. The security instructions must include the long and short titles of the plan, plan classification, any reproduction limitations and/or disposition requirements. Identify the classification in **Paragraph 2** (if applicable). See the Security Instructions-Record of Changes template.

3.13.4. Plan Summary. Plan Summaries will have ten major numbered paragraphs for: purpose, conditions for implementation, operations to be conducted, key assumptions, limitations, operations security, command relationships, logistics appraisal, personnel appraisal and shortfalls and limiting factors. See the Plan Summary template.

3.13.4.1. All major numbered paragraphs identified in this format must be included in the plan summary. Sub-paragraphs can be omitted, changed or added as required to cover the material.

3.13.4.2. All JBER plans will include the following statements on the Plan Summary page under Command Relationship edited as necessary to cover the plan content:

3.13.4.2.1. “Due to the complex command structure on JBER, it is conceivable that units assigned here may be reporting to several HHQs at the operational-level. The intent of this plan is to cover tactical, base-level [fill in type of operation] in a way that would apply universally regardless of which HHQ(s) are being supported by JBER-assigned organizations.”

3.13.4.2.2. “For execution of (plan short title), (office symbol of supported commander) will be the supported commander. Regardless of supported and supporting roles, (office symbol of supported commander) requires a high degree of inter-wing coordination from units and personnel not under his or her direct operational, tactical or administrative control in order to achieve unity of effort across JBER”

3.13.4.2.3. “All tasked JBER Commanders approve the usage of this plan by concurring/signing the Staff Summary Sheet. Only JBER Commanders with the potential to fill the supported commander role under this plan approve it for implementation by signing the base plan.”

3.13.5. Table of Contents (TOC). See the TOC template.

3.13.5.1. The formatting of the TOC is complex, so we suggest you copy the format and paste in your data rather than trying to reformat your TOC as it exists. The TOC should list the annexes, appendices, tabs and exhibits (with titles) and corresponding page number for your plan.

3.13.5.2. When any annex designator (A thru Z) is not used, enter “Not Used” in the “PAGE” column. If numerous sequential Annexes are not used, they can be grouped on one line (e.g. “ANNEXES D-H” “Not Used”).

3.13.6. Base Plan. Following a list of references, the base plan will have five major numbered paragraphs for: situation, mission, execution, administration and logistics, and command and control. The base plan will be signed by the supported wing commander(s) or designated representative(s). See the Base Plan template.

3.13.6.1. The five major paragraphs must be listed in each base plan even if they are not applicable. If they do not apply, "Not Used" should be inserted after the paragraph title (that is, "4. Administration and Logistics. Not Used."). This method permits standardization and enables planners to refer immediately to a standard paragraph when seeking specific information.

3.13.6.2. Although the example includes an outline for subparagraphs, if a sub paragraph is not needed it should be deleted, rather than inserting “filler”, or marking multiple subparagraphs “Not Used”. Sub-paragraphs can be omitted, changed or added as required to cover the material. Normal sequential numbering and lettering should be used for the sub-paragraphs used.

3.13.6.3. Mission statements must be succinct, and must answer the “five W’s” (who, what, where, when and why).

- 3.13.6.4. Detailed unit tasking and/or information is not normally included in the base plan. Detailed tasks are addressed in the appropriate functional annexes, appendices, and so forth. **NOTE:** Only basic tasks are stated here. However, each tasked organization should be briefly addressed in the base plan.
- 3.13.6.5. List all annexes actually used in the plan following the wing commander signature block.
- 3.13.7. Attachments. Attachments to the base plan listed in order of increasing detail are annexes, appendices, tabs and exhibits. Prepare attachments in a form that best portrays the information: for example, text, a matrix, an overlay, a map, graph, or table. The base plan should refer to each annex that has been prepared. However, information provided in the base plan is not normally repeated in the attachments. As annexes used for the plan are listed on the final page of the base plan, subordinate attachments to annexes (in the order of appendices, tabs, exhibits or maps) are listed on the final page of the parent attachment (in the order noted), i.e., tabs listed on last page of appendices and exhibits listed on last page of tabs.
- 3.13.7.1. Annexes. An annex is produced by a functional area (operations, logistics, and so forth) and describes the support the functional area will provide or require. It contains detailed information for a specific organization or subject. Use the Generic 5-Paragraph Annex template for any annexes requiring the five paragraphs included in the Base Plan. Generic 4-Paragraph Annex provides a simpler template (general, assumptions, responsibilities, and limiting factors) for annexes that do not require all five paragraphs. One of these two templates should be used for all annexes.
- 3.13.7.1.1. All JBER plans will contain, as a minimum, an Annex A (Task Organization) and Annex Z (Distribution), unless specified otherwise in a higher headquarters directive. It would be unusual for a plan not to have an Annex C, Operations. Refer to the TOC template for standard titles of remaining annexes and follow to the greatest extent possible.
- 3.13.7.1.2. If an Annex is absolutely required that is not on the standard list, use Annex M first. If additional non-standard Annexes are absolutely required Annexes N-P, R-T, and V can be renamed as required.
- 3.13.7.1.3. Most annexes will include the signature block of the responsible functional area commander or wing staff director. They will be approved by the functional area commander or wing staff director by signing the appropriate SSS (Or in the case of Annex Z, the Memorandum of Transmittal).
- 3.13.7.1.4. Limit content of annexes to essential local JBER information not covered in other publications. This does not preclude referencing those publications as appropriate. If there is no specific material for a numbered major paragraph, mark it "Not Used" or "See Base Plan" as applicable, but do not delete any major paragraphs from the standard four or five paragraph templates.
- 3.13.7.1.5. There are standard forms or templates for the following annexes:

3.13.7.1.5.1. Annex A, Task Organization. Start with the Annex A-Task Organization template and delete the organizations not tasked or supported by your plan. If 673 ABW is not the supported wing, or if there are multiple supported wings move the sections to reflect the plan task organization. Renumber the final product as required.

3.13.7.1.5.2. Annex U, Operations Security (OPSEC). Start with the Annex U-OPSEC template and customize the content for your plan.

3.13.7.1.5.3. Annex X, Execution Checklist(s). Start with the Annex X-Execution Checklist template.

3.13.7.1.5.4. Annex Z, Distribution. Use Annex Z-Distribution.

3.13.7.1.6. List all appendices (if any) addressed in the annex on the last page of the annex.

3.13.7.2. Appendix. An appendix is a subordinate addition to an annex. It includes information too lengthy or detailed for the annex. Normally, each appendix is devoted to a major category of information. For example, if a plan requires more than one response option, a separate appendix could be used to address each option.

3.13.7.2.1. List any applicable references specific to material covered in the appendix.

3.13.7.2.2. Assign appendix paragraph titles as required to meet the needs of the appendix. Appendices may use the Generic 5-Paragraph Appendix template, but it is not generally required. If it fits the content better, OPRs may use or modify the Generic 4-Paragraph Appendix template (general, assumptions, responsibilities and limiting factors). For appendices use any organizational outline that meets the need of the plan. Standardize when possible, but use a system that makes sense.

3.13.7.2.3. Signature elements are generally not used for appendices.

3.13.7.2.4. List all tabs (if any) addressed in the appendix on last page.

3.13.7.2.5. There are standard forms or templates for the following appendixes:

3.13.7.2.5.1. Appendix "X" to Annex C (COOP). IAW 673 ABW/CC Continuity of Operations Planning Guidance Memo dated 12 November 2018, as a minimum the following plans will include a COOP appendix: 673 CEG BCE-CRP, 673 MDG MCRP, JBER ICC Plan, JBER LRG IDP, JBER IEMP, JBER SFS IDP and the JBER NEO Plan. Start with the Appendix "X" to Annex C (COOP) template and customize the content for your plan. **NOTE:** The letter "X" is a placeholder, this appendix will be the final numbered appendix to Annex C.

3.13.7.2.5.2. Appendixes to Annex X. Use the AF Form 2519 Checklist template for all checklists in Annex X.

3.13.7.3. Tab. A tab is a further subdivision of an appendix used to organize and clarify the presentation of detailed data. Use or modify the Generic 4-Paragraph Tab template. Assign tab paragraph titles as required to meet the needs of the tab. Tabs may use the alternate four paragraph format, but they are free to use any organizational outline that meets the need of the plan. Standardize when possible, but use a system that makes sense.

3.13.7.3.1. Signature elements are not used for tabs.

3.13.7.3.2. List all exhibits (if any) addressed in the appendix on last page.

3.13.7.4. Exhibit. An exhibit is a further subdivision of a tab to enable the planner to organize the portrayal of greater levels of detail. Use or modify the Generic 4-Paragraph Exhibit template. Assign exhibit paragraph titles as required to meet the needs of the exhibit. Exhibits may use the alternate four paragraph format, but they are free to use any organizational outline that meets the need of the plan. Standardize when possible, but use a system that makes sense.

4. Plan Development. When a new plan is required, the unit-level plan OPR will contact 673 ABW/XPX. The JBER plans POC will assist the new plan OPR throughout the drafting process, but in general the steps to draft a new JBER plan are the same as those to review and update an existing plan given in **Paragraph 5** below. **Paragraph 3**, the templates on the 673 ABW/XP SharePoint, and the Plan Preparation and Revision Checklist, **Table A2.1** should be carefully used in the drafting process. New JBER plans are coordinated and approved IAW **Paragraph 6** exactly like existing plans.

5. Plan Review. All plans will be reviewed annually by their OPRs and 673 ABW/XPX. A plan may occasionally require review outside the normal review cycle. When HHQ or USAF directives require revisions or changes more than 3 months from the normal annual review, 673 ABW/XPX will support an out of cycle review. The plan review checklist in **Table 2**, this instruction, will be used for all plan reviews, annual and out-of-cycle.

5.1. Annual (In-Cycle) Review Process.

5.1.1. The plan OPR and OPR-tasked SMEs will identify areas requiring updates, changes, modifications, etc. using the Word version of the last approved version of the plan supplied by 673 ABW/XPX. **NOTE:** Use of a formal CRM to provide inputs/comments to the draft plan is optional during internal plan OPR and SME review, but mandatory for bottom, and top-line coordination.

5.1.2. The plan OPR will prepare a revised draft anytime the plan is inadequate as written, or when required administrative/organizational changes make the plan difficult to use, or make the lines of tasking ambiguous.

5.1.3. Plan OPRs will send completed drafts to 673 ABW/XPX for final formatting.

5.1.4. Once accepted, 673 ABW/XPX will prepare the required SSSs and CRMs and put the draft into bottom-line coordination IAW **Paragraph 6** below.

Table 2. Plan Review Checklist.

PLAN REVIEW CHECKLIST	YES	NO	N/A
1. Use 673 ABW/XPX supplied Word version of the plan for the review			
2. During the review, task all required SMEs to provide inputs			
3. Report the results of the review (plan current, or revision needed) to 673 ABW/XPX			
a. If the plan is current and requires no changes, provide 673 ABW/XPX with a letter authorizing use of the plan for another year (See: Review Memorandum template)			
b. If the plan requires minimal changes and coordination, provide 673 ABW/XPX with a letter listing required changes and authorizing use of the plan as amended for another year (See: Review with Change Memorandum template)			
c. If the plan has been revised, in, or out of cycle, send the new draft plan to the 673 ABW/XPX Plan POC in an email, confirming that all corrections have been made as prescribed, all applicable checklists have been completed and the plan is formatted IAW the JBER Plans Program Instruction, or other HHQ guidance			

5.2. Out of Cycle Review Process. Generally an out-of-cycle review begins with a change to HHQ guidance making the current JBER Plan inadequate as written. The changes required should be limited to meeting the new HHQ guidance and preventing mission-failure until the next annual review.

5.2.1. The plan OPR and any required SMEs will identify sections requiring changes, modifications, etc. using the Word version of the last approved version of the plan supplied by 673 ABW/XPX. **NOTE:** Use of a formal CRM to provide inputs/comments to the draft plan is optional during internal plan OPR and SME review, but mandatory for bottom, and top-line coordination.

5.2.2. Rather than preparing a new draft, the plan OPR will produce a change letter (see template [Attachment 2](#), this instruction) explaining the requirement for an out-of-cycle review, and a list of required changes signed by the Plan OPR's commander (Squadron or Group as appropriate) and the list of units on JBER outside the signing commander's organization, that are affected by the changes.

5.2.3. Once the change letter is approved by 673 ABW/XP, 673 ABW/XPX will prepare any required SSSs and CRMs to put the draft into bottom-line coordination, truncated to affected JBER units outside of the change letter signatory's organization. **NOTE:** Top-line review for out-of-cycle changes will be accomplished at 673 ABW/XP discretion.

5.2.4. Small-scale changes with limited impact outside the plan OPR's unit will be made administratively and a new copy of the plan, including the signed change letter, will be posted as "Change 1" on the appropriate SharePoint Plans Library under the original supported wing commander's signature.

6. Plan Coordination.

6.1. **Process Ownership.** JBER is a complex military installation with many diverse organizations and missions. It is imperative that unit-level Plan OPRs, ABW plans officers, the JBER Director of Plans and Programs and unit plans representatives share ownership in the coordination process. This section establishes staffing protocols between supported, supporting and tenant unit leadership for coordination of all plans affecting JBER. Follow these coordination procedures to ensure proper staffing and leadership approval.

6.2. **Bottom-line Coordination.** Use this coordination process for the initial review by the supported and supporting wings' groups, and wing staff agencies (WSAs) as well as affected tenant units on JBER.

6.2.1. The plan OPR sends the draft plan to 673 ABW/XPX, which will staff the plan to all affected organizations with a blank CRM, and any applicable SSSs.

6.2.2. All organizations will use the CRM in **Figure 1**, this instruction, to provide inputs/comments to the plan. Organizations will send completed CRMs to 673 ABW/XPX; which after cursory review will send them to the OPR/planner for plan update or adjudication. Fill out the CRM as follows:

Figure 1. Comment Review Matrix (CRM).

Comment #	ORG REVIEWER PHONE	Page/ Para/ Line	Comments (Administrative, Substantive, or CRITICAL) Rationale	Adjudication
1	Name Org/Office Symbol Phone Number	Page # Para # Line #	Administrative. Reword to say "..." Rationale: better explains requirements/intent.	
NOTE: Do not change column titles; use the format as shown. If you have general (GEN) comments that apply to the whole document, place the word 'GEN' under the Page/Para/Line column. If there is a figure on a page that you need to address, place the figure number and title of figure under the Page/Para/Line column.				

6.2.2.1. In the "Org., Reviewer, Phone" column, include name, organization and Defense Switched Network (DSN) or commercial phone number of the specific person in the organization that made each comment.

6.2.2.2. In the "Page, Para., Line" column, list the page number as it appears on the page rather than on the running count ("C-4-1", rather than "73 of 158"). Also use the paragraph label as it appears, rather than counting paragraphs from the top of the page ("3.b. (1)", rather than "2nd from top").

6.2.2.3. "Comments (Administrative, **Substantive**, or **CRITICAL**) Rationale" Column.

6.2.2.3.1. Place only one comment per row. Ensure all comments describe an action to be taken, i.e.: Reword, “GP/CC will not...” or: Add, “Have all units...” or: Delete, “XP office”. If you have questions, call or contact the applicable Wing Plans Officer or unit-level plan OPR directly to resolve them prior to making your comment. **NOTE:** Consider the impact of JBER support agreements and memorandums of agreement/understanding (OPR: 673 CPTS/SAO) when revising or changing JBER plans.

6.2.2.3.2. Comments will be identified as Administrative, **Substantive**, or **CRITICAL**.

6.2.2.3.2.1. Administrative comments identify grammar, punctuation, formatting errors, and so forth. Please include correct information or note discrepancy. **NOTE:** The word “Administrative” should be capitalized, but neither bolded nor all in CAPs.

6.2.2.3.2.2. Substantive comments pertain to information factually incorrect, unnecessary, misleading, confusing, or inconsistent. Please include correct information or note discrepancy. **NOTE:** The word “**Substantive**” should be capitalized, and bolded but not all in CAPs.

6.2.2.3.2.3. **CRITICAL** comments pertain to major deficiencies that will cause plan or mission failure due to conflicts with current directives, procedures, or common practices. For this reason, A **CRITICAL** comment means the reviewer “non-concurs” with the plan as written, and reviewing units with **CRITICAL** comments should not sign the SSS until these comments are resolved. Please include the information required to clear the **CRITICAL** comment. **NOTE:** The word “**CRITICAL**” should be bolded and all in CAPs.

6.2.2.3.3. Include any rationale to clarify or justify comments or inputs made. Include any applicable directives and/or guidance.

6.2.2.3.4. Any classified comments must be submitted via SIPR. In the case of classified plans the Wing Plans Officer will provide a CRM via SIPR.

6.2.2.4. The “Adjudication” Column is for plan OPR and Wing Plans Officer use only, and reviewers will leave it blank.

6.2.2.5. Reviewers will send the CRM to their group executive officer, unit commander or staff agency director, who will compile all inputs/comments. Once approved by the individual tasked to sign the SSS, forward them to the 673 ABW/XPX POC. XPX will review and forward the Consolidated CRM to the plan OPR for adjudication/plan update. **NOTE:** Organizations with unit plans officers may use them in addition to, or in lieu of executive officers for input/ comment compilation and approval.

6.2.3. Adjudication. The plan OPR will determine if the inputs/comments can and should be incorporated into the plan. This will be annotated in the adjudication column in one of three ways:

6.2.3.1. “Concur” means the input/comment will be incorporated into the plan as submitted.

6.2.3.2. “Partially Concur” means that the section requires a change, but that the input/comment will not be incorporated into the plan exactly as submitted. For “Partially Concur” responses the plan OPR will include the new wording of the section in the adjudication column. A “Partially Concur” answer to a **CRITICAL** comment requires the plan OPR to contact the reviewer and make sure that the change made will resolve the major deficiency that drove the comment.

6.2.3.3. “Non-Concur” means that the input/comment will not be incorporated into the plan. For “Non-Concur” responses the plan OPR will include the reason for rejecting the comment in the adjudication column. A “Non-Concur” answer to a **CRITICAL** comment requires the plan OPR to contact the reviewer and attempt to resolve the major deficiency in another way.

6.2.4. After any required adjudication and plan updates are completed, the OPR/planner forwards the revised draft to 673 ABW/XPX with the fully adjudicated CRM. The XPX POC has the option to resend the plan package to any tasked organizations whose actions or procedures have been substantially modified by changes made by other units. If no further comments or inputs are identified, the plan is ready for top-line coordination.

6.2.5. Commanders or Directors will generally sign the appropriate SSS, using the most current instruction sheet provided by 673 ABW/XP once any **CRITICAL** comments have been adjudicated. If commanders want updates on the adjudication of any Administrative or **Substantive** comments prior to the plan entering top-line coordination, they can request them from the applicable Wing Plans Officer via email (no memo required).

6.2.6. Once all required changes have been incorporated into the new draft, 673 ABW/XPX will create the Top-line coordination package that contains a top-line SSS, signed bottom-line SSS, the consolidated and adjudicated bottom-line CRM, and the most current draft plan. Top-line coordination generally occurs in two phases: supporting wing top-line coordination and supported wing top-line coordination.

6.3. **Top-line Coordination.** Use the top-line coordination process for final plan review and approval. **NOTE:** Supported and supporting wing commanders specify the members of their staff included on top-line coordination SSSs. **NOTE:** Prior to top line coordination, all tasked units in the draft plan, through group level and tenant organizations on JBER will have been given the opportunity to review and provide comments to the plan. Any adjudication required during bottom line review will either be complete prior to top-line coordination, or, if the group positions are irreconcilable those issues will be specifically noted in the top-line SSS as open **CRITICAL** comments.

6.3.1. Supporting Wing Commander Review. 673 ABW/XPX will send the plan package that includes the consolidated and adjudicated bottom-line CRM, SSS, and most current copy of the draft plan to the supporting wing commander through their executive officer. **NOTE:** Bottom-line SSSs for the 3 WG will be electronic and sent via email. Bottom-line SSSs for the 673 ABW will be cut to a disk to accompany the hard copy SSS, and hand-carried in a folder.

6.3.1.1. If there are no additional comments, the commanders will sign the SSS concurring with the plan as written and forward through their executive officers to 673 ABW/XPX.

6.3.1.2. If the supporting wing commander has any inputs/comments to the plan:

6.3.1.2.1. The supporting commander's executive officer will forward them on the CRM provided to 673 ABW/XPX. **NOTE:** If either wing commander provides comments directly on the draft plan, or in a format other than the CRM, the wing executive officers will add these top-line comments to the consolidated and adjudicated bottom-line CRM using the instructions in [paragraph 6.2.2](#) above.

6.3.1.2.2. 673 ABW/XPX will send the consolidated CRM to the OPR/planner for plan update and advise the OPR/planner as to what level of review and/or adjudication is required.

6.3.1.2.3. The plan OPR will forward the revised draft to 673 ABW/XPX for final concurrence by the supporting wing or equivalent level commander. Once this final check is complete, the supporting wing commander will forward their SSS to 673 ABW/XPX indicating concurrence of the plan as written.

6.3.2. Supported Wing Commander Review. The 673 ABW/XPX will forward the plan package including all signed SSSs, latest draft plan, and the consolidated and adjudicated CRM to the supported wing for signature. If no further comments or inputs are required for the plan, the supported wing commander will sign the SSS and the plan for implementation. **NOTE:** If additional commander's inputs/comments are noted, supported wing top-line coordination update/adjudication process is the same as the supporting wing top-line coordination update/adjudication process in [paragraph 6.3.1.2](#) above.

6.3.3. The final plan package is then sent to 673 ABW/XPX for publication. The Director of JBER Plans and Programs will notify organizations of the new plan posting to the JBER plans e-libraries.

PATRICIA A. CSÀNK, Colonel, USAF
Commander

Attachment 1**GLOSSARY OF REFERENCES AND SUPPORTING INFORMATION*****References***

CJCSM 3130.03A, *Adaptive Planning and Execution (APEX) Planning Formats and Guidance*, 4 February 2019.

AFI 16-1404, *Air Force Information Security Program*, 29 May 2015.

AFMAN 10-409-O, *Support to Adaptive Planning*, 19 April 2016.

AFMAN 33-363, *Management of Records*, 1 March 2008.

Prescribed Form

No forms were prescribed by this publication.

Adopted Form

AF Form 2519, *All Purpose Checklist*.

Abbreviations and Acronyms

ABW—Air Base Wing

AEF—Air & Space Expeditionary Force

AFRIMS—Air Force Records Information Management System

CPTS—Comptroller Squadron

CRM—Comment Review Matrix

CSS—Commander Senior Staff

DoD—Department of Defense

DSN—Defense Switched Network

FOUO—For Official Use Only

HHQ—Higher Headquarters.

JBER—Joint Base Elmendorf-Richardson

MAJCOM—Major Command

NIPRNET—Non-Classified Internet Protocol Router Network

OPR—Office of Primary Responsibility

OPSEC—Operations Security

PDF—Portable Document Format

POC—Point of Contact

RDS—Records Disposition Schedule

SIPRNET—Secret Internet Protocol Router Network

SME—Subject Matter Expert

SSS—Staff Summary Sheet

TOC—Table of Contents

Terms

Adjudication—For the purpose of this instruction, adjudication refers to the final judgment of acceptance of change in the review process of a plan that will determine the course of action taken in reference to the issue presented.

Annex—Portion of the plan that breaks down requirements to the functional level (operations, logistics, etc.), describes the concept of mission support by the functional area, and provides detailed information for a specific organization or subject.

Appendix—Subordinate addition to an annex. Includes information too lengthy or detailed for the annex and usually contains a major category of information.

Base Plan—The portion of the plan that provides overarching information on the purpose, implementation, operations, administration, logistics, and command relationship procedures throughout the document.

Commander's Senior Staff—Supporting, tenant and subordinate commanders and civilian leaders that support the supported wing commander in the Installation Command Center during times of crisis.

E-libraries—JBER Plans and Programs libraries of local plans and 673 ABW/XP-written instructions.

Exhibit—Subdivision of a tab to further organize detailed information.

Plan Development Process—Process, as determined by XP, to develop, revise, or change a local plan. That process is included in this instruction.

Plan OPRs—Unit personnel primarily responsible for the content, currency, distribution, and use of a local plan.

Program Review—Periodic review of a local plan by the OPR to determine if the plan is still relevant and current

Tab—Subdivision of the appendix used to organize and clarify detailed information.

Tasked Units—Those units tasked with supporting specific actions identified in a local plan.

Unit Plans Representative—Group, squadron, flight, staff agency, or associate unit representative who coordinates multiple unit-level plans, advises and represents their commander on plans related matters, coordinates with 673 ABW/XP on matters pertaining to HHQ and/or JBER plans tasking or supporting their unit, and other duties as directed. **NOTE:** This is an optional position on JBER.

Attachment 2

PLAN FORMATTING CHECKLIST

Table A2.1. Plan Preparation and Revision Checklist.

PLAN PREPARATION AND REVISION CHECKLIST			
This checklist is designed to help with the preparation of new plans or revision of existing plans. For plan revisions, run this checklist after the plan review process is complete by comparing formatting and elements used with the current linked templates.			
A. REQUIRED PLAN ELEMENTS	YES	NO	N/A
1. Front cover. Use/refer to one of the following templates:			
a. Title Page JBER Plan			
b. Title Page 3 WG Plan			
c. Title Page Unit-Level Plan			
2. Memorandum of transmittal. Use/refer to: Memorandum of Transmittal template			
3. Security instructions and record of changes. Use/refer to: Security Instructions-Record of Changes template			
4. Plan summary. Use/refer to: Plan Summary template			
5. Table of Contents. Use/refer to: TOC template			
a. Titles of contents match heading titles used in the body of the plan			
b. All annexes accounted for (including those not used/noted as such)			
6. Base plan. Use/refer to: Base Plan template			
7. Appropriate annexes. Use/refer to one of the following templates:			
a. Generic 5-Paragraph Annex			
b. Generic 4-Paragraph Annex			
c. Annex title match with title used in the Table of Contents and attachment list at the end of the Base Plan (all instances of the annex title must be identical).			
8. Annex A--Task Organization. Use/refer to: Annex A-Task Organization template			
9. Appropriate appendices. Use/refer to one of the following templates:			
a. Generic 5 Paragraph Appendix			
b. Generic 4-Paragraph Appendix (Modify as required.)			
c. Appendix title match with title used in the Table of Contents and attachment list at the end of the applicable annex (all instances of the appendix title must be identical).			
10. Appropriate tabs.			
a. Use/refer to: Generic 4-Paragraph Tab template. (Modify as required.)			
b. Tab title match with title used in the Table of Contents and attachment list at the end of the applicable appendix (all instances of the tab title must be identical)			

A. REQUIRED PLAN ELEMENTS (cont.)	YES	NO	N/A
11. Appropriate exhibits.			
a. Use/refer to: Generic 4-Paragraph Exhibit template. (Modify as required.)			
b. Exhibit title match with title used in Table of Contents and attachment list at end of applicable tab (all instances of exhibit title must be identical).			
12. Annex U--OPSEC. Use/refer to: Annex U-OPSEC template. (Modify as required.)			
13. Annex X--Execution Checklist (when appropriate and useful).			
a. Use/refer to: Annex X--Execution Checklists template.			
b. For actual checklists, use/refer to: Appendix to Annex X template			
14. Annex Z--Distribution. Use/refer to: Annex Z-Distribution template			
15. Back Cover Top and bottom marked "UNCLASSIFIED//FOR OFFICIAL USE ONLY" if required			
B. FORMATTING (Read Chap 3 above)	YES	NO	N/A
1. All instances of plan header match in wing and date			
2. All section headings (plan summary, basic plan, annex, appendix, etc.) titles match table of contents and applicable section lists.			
3. All paragraphs aligned evenly			
4. No automatic formatting (automatically bulleted lists, continuous page breaks etc.)			
5. Paragraphs numbered according to the following numbering scheme: 1. a., (1), (a), <u>1</u> , and <u>a</u> or with 673 ABW/XP format waiver , 1, 1.1, 1.1.1, and 1.1.1.1?			
6. All subdivided paragraphs have at least two subdivisions (i.e., cannot have an "a" without at least a "b" or a (1) without a (2), etc.)			
7. Paragraph numbers/letters in consecutive order (ensure none have been inadvertently skipped)			
C. GRAMMAR	YES	NO	N/A
1. Future tense (i.e., tasks will be done)			
2. Active voice			
3. Not verbose			
4. Language simple, clear, and to the point			
5. Spelling checked			
D. CONSISTENCY (ESTABLISH "RULE" AND STICK WITH IT)	YES	NO	N/A
1. Abbreviations (spelled out once the first time used, then abbreviation thereafter)			
2. Nomenclature (i.e., # WG/CC or wing commander)			
3. Capitalization			
4. Bottom line--does whole plan look and sound like it was written by one person			

E. CONTENTS	YES	NO	N/A
1. The plan must answer the question: “how do we do that on JBER?” rather than compile HHQ guidance. (“AFI copy-paste” sections are not needed or permitted in local JBER plans.)			
2. Logical and complete tasks			
3. Each task clearly levied against a specific commander			
4. The plan flows logically			
5. Tasked commanders listed in Annex A and briefly addressed in the base plan			
6. Tasks are reasonable given resources and constraints			
F. COORDINATION	YES	NO	N/A
1. All tasked agencies given the opportunity to review/coordinate on the draft plan			
2. 673 ABW/XP given the opportunity to review/coordinate on the draft plan (even if not tasked)			
G. SECOND (AND SUBSEQUENT) DRAFT(S)	YES	NO	N/A
1. Use previous coordination copy to ensure all changes made			
2. Discuss concerns with OPR (remind OPR to prepare staff package for final coordination)			
3. Recheck briefly for format, content, and consistency			
4. Read a second time to catch mistakes missed before			