

2008 CIVIL AIR PATROL PUBLIC AFFAIRS OFFICER ACADEMY



The PA Planning Process

Part I: I Barely Have Time to React, Let Alone Plan Ahead —
But Should I?

"Good fortune is what happens when opportunity meets with planning."

- Thomas Edison

This packet has information on how you as a Civil Air Patrol (CAP) Public Affairs Officer (PAO) can use planning to help you succeed as a PAO and have the solid foundation for an effective Public Affairs Program at the Squadron, Group, Wing or Region level.

Here is what's in the packet:

- Why you need a good PA Plan
- The 4 Step Planning Process
- Getting buy-in from your leadership
- Resources
- Moving Forward after you have a plan

Our goal for this session is to prepare you with good planning (and the tools to do good planning) to meet Public Affairs opportunities head on and, in the process, effectively brand CAP at all levels of the organization.

Major Al Pabon's Story

Well, let's start with a short story.

"I firmly believe that Public Affairs is about telling our story and we have many great stories to tell.



In 2001 when I first became the Minnesota Wing PAO I had nothing. No files, records, work papers, nothing but some old newsletters on a zip disk. But I had a direction from my commander.

And an upcoming Wing Compliance Inspection!

After 40 days of scrambling I was able to score a "Satisfactory" for that compliance inspection. It was painful because I had no one to work with and I felt that I was inventing a program from scratch. I was grateful for the help of the former National PA Director, Mary Nell Crowe and my good friend Jim Tynan.

They really helped me thru the situation."

PAO Goals

- The Wing Newsletter
- The Wing Website
- PAO Training – For myself and my squadrons
- Activity Coverage and Support

“After the inspection I looked at my notes and the old 190-1 and realized that I needed to organize myself and set some priorities.

These commander priorities were:

- The Wing Newsletter
- The Wing Website
- PAO Training – For myself and my squadrons.
- Activity Coverage and Support”

Over the next few years

- Planning evolved
- Had some success
- Became a process

“Over the next few years I started to make informal plans and goals and those evolved into a planning document that would help guide my work.

Over my term as the Minnesota Wing PAO I was able to learn and grow as a PAO. I was able to garner some success because I planned for it.

My planning process was initially haphazard but ultimately actually became a process.”

The Bottom Line

Now many of you are thinking that “I don’t need to plan”, “I just need to follow the regulations”, “I have never written a plan” or the ever popular “I don’t want to write a plan.”

If you want to succeed at anything you must have a plan. That’s the bottom line.

This is true in business, in your life and in our work as CAP Volunteers.

Julie Debardeleben has been working with the Region Directors to get working PA and Crisis Communications Plans up and running for each of the regions and their wings.

This is important because how can we ask you as wing and unit PAO’s to do this unless we have done it as well.

**To Succeed you must
have a good plan**

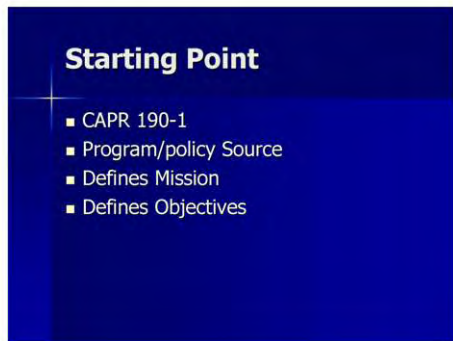
Well, that’s enough of story time. Let’s look at the planning model.

The Public Affairs Planning Model – An Overview

We will review a simple 4-step planning process that can be applied to all echelons from squadron to region. Working together with your commander, unit leadership and higher-echelon PAO's, you will be able to craft a realistic and measurable plan that is in compliance with the requirements of CAPR 190-1.

More importantly you will be prepared with good planning to meet PA opportunities head on and, in the process, effectively brand CAP at the local level.

Let's look at the 4 step planning process.



Starting Point

- CAPR 190-1
- Program/policy Source
- Defines Mission
- Defines Objectives

Let's start by looking at CAP Regulation 190-1.

This is the regulation that established the mission and objectives of our public affairs program.

This version of CAPR 190-1 was developed by a committee of senior PAO's and National Staff over the course of 2 years.

It was approved by the National Commander in June 2007

So what does that mean?

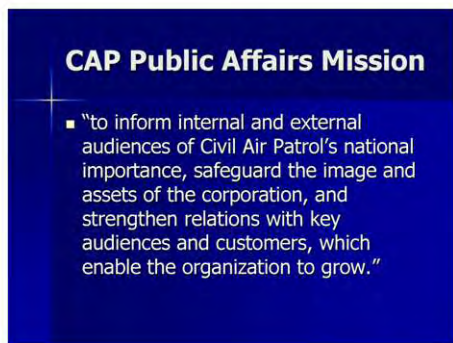
Basically it means that we tell our stories:

- What we do
- Why we do it
- Why what we do is important

We protect the organization with the facts and our stories.

We build relationships (by telling our stories) with

- Key audiences/customers (ask who those are)
- The Air Force
- Friends and supporters
- Our own members



CAP Public Affairs Mission

- "to inform internal and external audiences of Civil Air Patrol's national importance, safeguard the image and assets of the corporation, and strengthen relations with key audiences and customers, which enable the organization to grow."

PA Program Objectives

- Increase public awareness of CAP, its local, state, and national missions and its contributions to the nation.
- Develop and conduct a comprehensive internal and external public relations plan.
- Promote cooperation between CAP and other aviation organizations, the military, business, industry, and civic groups.

Once a mission statement was firmed up three objectives were developed:

Each of these objectives supports the mission statement. This will be a recurring theme.

In planning the objectives always support the mission statement.

Objectives

- Support the Mission Statement
- Plans support objectives at all levels

In planning the objectives always support the mission statement.

In a hierarchical organization like ours the PA Plan of each echelon should support the plan of their higher headquarters and so on and so on.

Make CAPR 190-1 your friend

Make sure that you are familiar with the rest of the regulation. It's a very short and concise read. And it's in your packet. 😊

Let's look at the steps involved in the planning process.

STEP 1 - Determine PA Needs and Opportunities (Situation Analysis)

This step provides the basic (Background) information about your organization. The PAO should work with organizational leaders (deputy/vice commander, chief of staff, program managers) to get this data together.

Step 1 – Situational Analysis

- How many squadrons and units are in the wing?
- How many cadet and senior members are in your unit/group/wing?

Step 1 – Situational Analysis

- List the special events conducted each year
- Identify the unit's strengths
- Identify areas targeted for improvement
- List the PA initiatives currently being conducted and/or planned for the near future

A. How many squadrons and units are in the wing?

B. How many cadet and senior members are in your unit/group/wing?

How many of these are active members? This is important because the number of active members is a very key indicator of unit stability, effectiveness and potential for growth in the unit.

C. List the special events conducted each year such as

- SAREXs, Tabletop Exercises, Actual Missions
- Wing/Region Conferences
- Cadet Orientation Flights
- Change of command ceremonies
- Encampments
- Air Shows, Open Houses
- Training. (ES and Cadet)

D. Identify the Unit's (or group or wing as appropriate) strengths, such as number of missions and saves, total flight hours, and number of members involved in major awards received etc...

The key question is "What does your unit really do well and what are you known for in and out of CAP?"

E. Identify areas targeted for improvement, such as CI/SUI findings, Evaluated SAR Write-ups, the need for increased external funding, a permanent facility, etc...

F. in consideration of this snapshot of your wing/unit, list the PA initiatives currently being conducted and/or planned for the near future.

These should gain public awareness and support for the wing through promotion and communication of significant missions, member accomplishments, special events, and other ways in which the wing, squadron, or unit stand out above the rest.

Here is where you list all of the things you are already doing to

address these public awareness needs and opportunities, as well any plans you may have for the future.

G. Can PA help address areas needing improvement, such as recruitment?

(Please note that good Public Relations (Affairs) is always helpful to an organization.)

If so, cite the initiatives PA implements and/or plans to implement in the future.

H. What can be done in the coming year to improve your PA program?

Think about items such as

- creating closer partnerships with emergency service providers and the Air Force to enhance local visibility
- holding an annual PA summit consisting of key stakeholders to ensure all PA needs and opportunities are being met
- Studying the National Public Awareness Plan to uncover viable goals and objectives that will complement the wing/squadron's PA plan. Don't forget about other organizations planning.

Finally, for this planning process to succeed you must involve and get support from the leadership of your unit or wing.

Meet with the Commander early on. Remember you report to him/her. We made it clear in the 190-1 that PA is a "Commander's Program."

You work for the Commander, not the Deputy/Vice Commander or Chief of Staff. But you must involve these senior leaders and others like the "Mission Folks". The Deputy Commander for Cadets, the Aerospace Education Officer and The Emergency Services Officer.

Don't forget about the Recruiting Officer. He will come to depend on you and your work and you will really need him/her as well.

These members will help you get solid answers to your questions as well as provide a "operational perspective."

And you have to sell them on the process and the anticipated results.

Getting the unit/wing leadership involved early in the process is a formula for success.

Step 1 – Situational Analysis

- Can PA help address areas needing improvement, such as recruitment?
- If so, cite the initiatives PA implements and/or plans to implement in the future.
- What can be done in the coming year to improve your PA program?

You will need to

- Work with the Commander
- Work with his/her key staff
- Sell them on process and results
- Engage leadership early



Step 2 - Establish Objectives for Your Plan

In this step you will take your situation analysis and from that create objectives for your unit/wing.

Step 2 – Set Objectives

- These objectives should be "Big Picture" items that have an impact on the whole organization.
- Limit them to not more than 5 objectives.
- The details behind these objectives are the goals that you and your commander will set for your organization.

These objectives should be "Big Picture" items that have an impact on the whole organization. Don't think about specific projects but the big things that will improve the unit and spread the word about it.

Try to limit them to not more than 5 objectives.

The details behind these objectives are the goals that you and your commander will set for your organization.

Step 2 – Suggested Objectives

- List the objectives identified in the situation analysis
- Encourage members to tell their friends about CAP and the opportunities available to members for service and personal growth

Suggested Objectives can include:

A. The objectives identified in the situation analysis provided above. These can be referred to as the "Big and Obvious" objectives.

B. Encourage members to tell their friends about CAP and the opportunities available to members for service and personal growth (recruitment initiatives) The focus should be on "Pride of Membership"

C. Increase public awareness of CAP, its local, state, and national missions, and its contributions to the nation; and

D. promote cooperation between CAP and other aviation organizations, the military, business, industry and civic groups.

Note that objectives C and D are pulled from CAPR 190-1 and may be used as the objectives for the unit/wing's plan! We encourage it!!

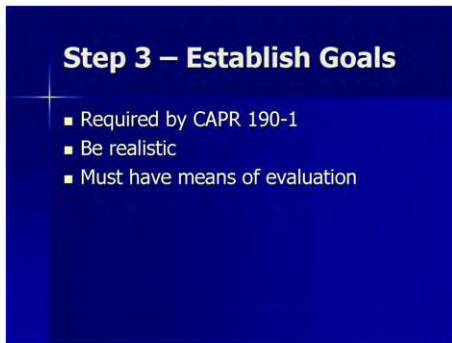
Step 3 - Establish goals for each objective

CAPR 190-1 requires implementation of goals that target public awareness and networking.

Feel free to use the goals listed here or create your own. Ideas for implementing each goal are also provided.

Suggested ways to evaluate the success of each goal are cited as well. These suggestions are provided to help you get started and or not intended to represent an exhaustive list of the innumerable combination of goals and implementation strategies you may already be using.

You may, of course, use any or all of them that apply to you, but each wing/squadron should also list their own initiatives here.



Step 3 – Establish Goals

- Required by CAPR 190-1
- Be realistic
- Must have means of evaluation

This section requires three things –

- At minimum a public awareness and networking goal
- A list of projects and initiatives designed to achieve these goals
- A statement regarding how you will evaluate each goal's success

On the next few pages are some suggested goals for recruiting, public awareness and networking. Feel free to adapt these for your local situation.

Sample Goals and Measures

For recruitment initiatives your goal(s) may target

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| <p>Sample Goal: Contests/promotions to recruit new members (Sample goal: Host a “bring-a-friend” event that highlights CAP and all the benefits and opportunities for membership)</p> | |
| <p>Way to implement this goal may include:</p> <ul style="list-style-type: none"> • Stage a unit open house • Ensure all participants can readily recite CAP’s mission statement and understand our missions • Prepare information packets for visitors • Publicize the event in the local media • Invite a VIP speaker to attract interest in the event | <p>Ways to measure success may include:</p> <ul style="list-style-type: none"> • Number of new members joining “Fifteen members brought 20 guests and five became members” • Measurable effect of marketing effort: “The event was promoted in the local paper and the VIP guest was interviewed by the local TV station” |

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| <p>Sample Goal: Promote CAP in the local community through wide distribution of the Civil Air Patrol Volunteer Magazine and Unit Newsletter.</p> | |
| <p>Ways to implement this goal may include:</p> <ul style="list-style-type: none"> • Distribute to appropriate target audiences, including members of the military, media, and elected/appointed officials • Distribute the magazine at high traffic areas in the community • Collect magazines from members for recycling in the community | <p>Ways to evaluate success for this goal may include:</p> <ul style="list-style-type: none"> • Wing/squadron recycles 200 copies of each issue • Wing/squadron disseminated the magazine to key constituent audiences in the local community and, as a result, CAP is now more widely understood and appreciated as evidenced by a 5 percent increase in requests for assistance from these organizations. • The local media and editors of military publications contact the wing/squadron PAO for information when an SAR is being conducted or a disaster strikes • The wing/squadron has experienced a 10 percent increase in membership inquiries from the general public |

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| <p>Sample Goal: Participation at air shows and other events (Sample goal: Promote the benefits of CAP membership at events that attract patriotic citizens interested in aerospace)</p> | |
| <p>Ways to implement this goal may include:</p> <ul style="list-style-type: none"> • Set up a booth for dissemination of materials and meet/greet opportunities • Stage a special event, such as posting of colors at organizational meetings or community events • Publicize participation in the local community | <p>Ways to evaluate success may include:</p> <ul style="list-style-type: none"> • More than 20 applications for membership were completed • More than 50 people are interested in finding out more information about CAP (Measured from number of contacts to unit via walk-in, e-mail or web or from NHQ referral) • The events attracted a photo/cutline in the local paper and a 10-second sound bite on the evening news |

For public awareness your goal(s) may target:

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| <p>Sample Goal: Proactive media relations (Sample goal: Attract widespread, ongoing print and broadcast media coverage through proactive media relations tactics)</p> | |
| <p>Ways to implement this goal may include:</p> <ul style="list-style-type: none"> • Establish a relationship with local media on a first name basis • Look for good story ideas and provide them to the media on an ongoing basis • Look for local, regional and national opportunities to offer a reprint of stories associated with your wing or squadron in the Volunteer | <p>Ways to evaluate success may include:</p> <ul style="list-style-type: none"> • As a result of enhanced media relations, the wing/squadron's publicity increased from three to five stories • The wing/squadron pitched story ideas to the media that resulted in coverage of two members' accomplishments and one special event • A feature that appeared in the Volunteer also ran in "Flying" magazine and in the online version of the New York Times. |

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| <p>Sample Goal: Develop and implement local media strategies designed to garner maximum publicity for the unit and its members.</p> | |
| <p>Ways to implement this goal may include:</p> <ul style="list-style-type: none"> • For emergency and disaster relief missions, include FEMA, Red Cross and other emergency service providers in news release dissemination; don't forget online news sources • For member and wing/squadron accomplishments, in addition to news release dissemination to the media, add posting of this information on the wing/squadron Web site, running it in the wing/squadron newsletter, sending it to CAP News Online and/or the Volunteer and identifying publications that target audiences pertaining to the topic at hand (such as aerospace education, airplanes or veterans) • For special events, publicize the information in local calendars, on marquees, on radio and TV talk shows, in military communications venues and the Volunteer, as appropriate | <p>Ways to evaluate success may include:</p> <ul style="list-style-type: none"> • Citing the increased publicity resulting from enhanced media and promotions strategies |

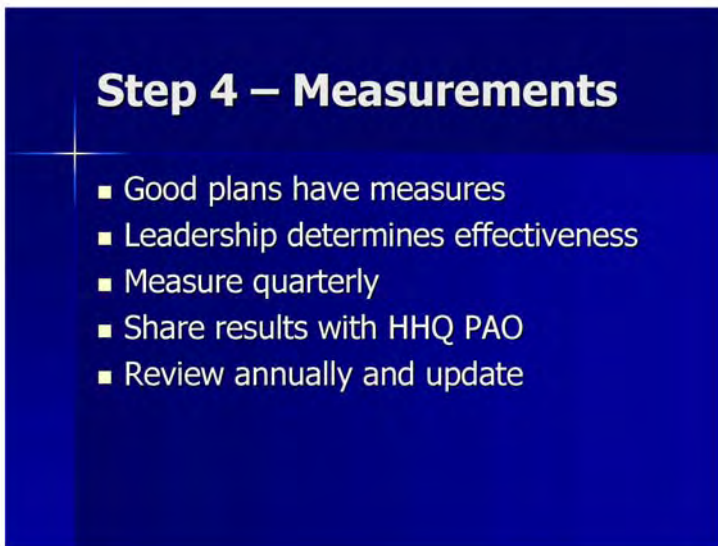
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| <p>Sample Goal: Establish a communications program that embraces the latest trends and technology.</p> | |
| <p>Ways to implement this goal may include use of the following tools:</p> <ul style="list-style-type: none"> • Unit/Wing Web site • Listservs • Unit/Wing newsletter • Multimedia materials • Social media | <p>Ways to evaluate success may include:</p> <ul style="list-style-type: none"> • Citing the number of hits on the Web site • visitors to the listserv • response to the newsletter as evidenced in a reader survey or # of downloads • multimedia and social media feedback |

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| Sample Goal: Use the compelling message on all news releases and internal correspondence | |
| Ways to implement this goal may include: <ul style="list-style-type: none"> • Use the message on all communications vehicles such as newsletters, brochures, flyers, posters, websites, as well as banners, ads, etc. | Ways to evaluate success may include: <ul style="list-style-type: none"> • Enhanced understanding and appreciation of CAP's brand as evidenced by audience response to promotional and communications pieces |

For Networking Initiatives:

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| Your goal(s) may target civic and community groups, the military, and schools (Sample goals: Partner with local Volunteer and Information Center to do community service projects OR have a representative of the wing or squadron speak at least three times annually at school or civil events) | |
| Ways to implement this goal may include: <ul style="list-style-type: none"> • Establish a Speaker's Bureau • Establish a Wing Legislative Squadron • Coordinate participation in three civic or community projects each fiscal year | Ways to evaluate success may include: <ul style="list-style-type: none"> • Citing the number of civic and community service projects and the results of each project • Number of Engagement your Speaker's Bureau participated in • Number of members that join the Legislative Squadron |

Step 4 - Determine the effectiveness of your planning



Step 4 – Measurements

- Good plans have measures
- Leadership determines effectiveness
- Measure quarterly
- Share results with HHQ PAO
- Review annually and update

The toughest part of planning is objectively measuring the results of your work.

A good plan has very specific measures that your leadership uses to evaluate the effectiveness of the plan in achieving unit goals. Note that the leadership evaluates the effectiveness of the plan. You will have most of the input but the leadership or specifically your commander makes the call on mission accomplishment or success.

A good plan is reviewed and updated on a regular basis. To really gage effectiveness of the plan it should be looked at quarterly. This allows you and

your commander to note what is working well and what you can do better in the immediate future.

This can be done in an informal meeting with the commander. It does not need to be a formal production.

You should share the results of this review with your Higher HQ PAO and keep a copy of the review in your files for the inspector. Your Higher HQ PAO will also be interested in what's happening and may be of help to you and your unit.

Finally set some time each year to review the plan with the leadership to see how you have been successful, determine areas that need work and set/update your goals and objectives for the next year.

Next Steps

So now we have talked about the plan and it is a great plan that meets your goals. There is one other item for your attention.

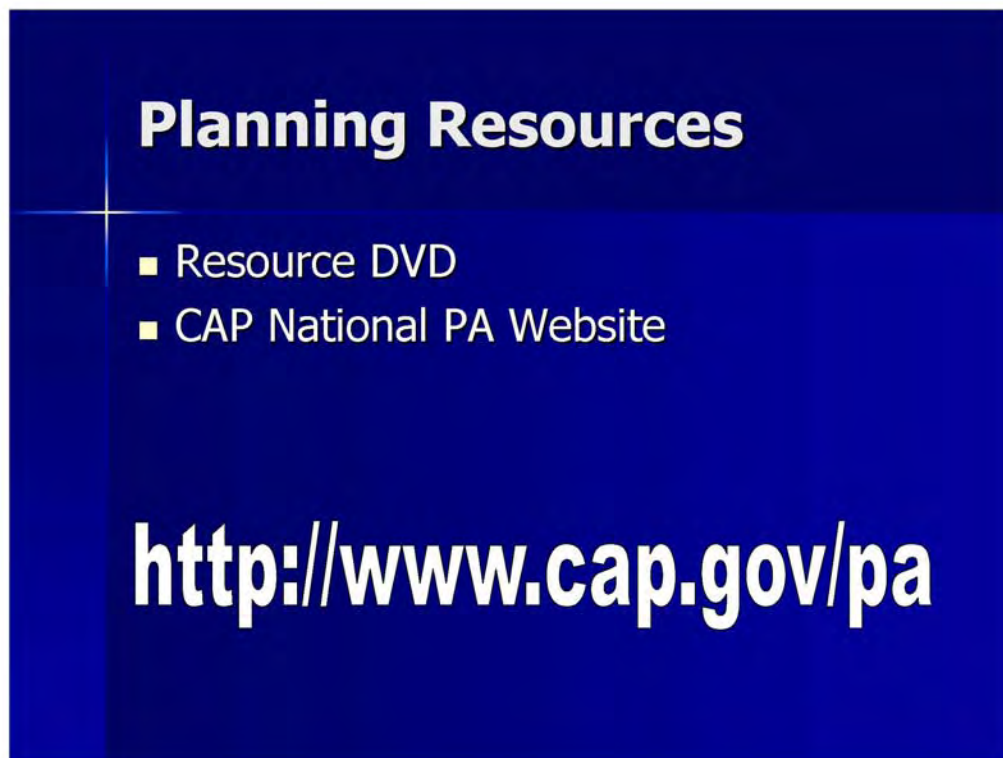
There is no requirement for you to have your PA plan approved by higher HQ, unless your wing or region requires this approval. Check with your Wing or Region PAO or local supplements to CAPR 190-1.

However it is suggested that you send your plan to your next level PAO and ask for his/her input or comments.

Once it is approved by your commander, send it up the chain so your Higher HQ PAO's are informed of your plans and they can see how you are doing in accomplishing your goals and be of help if needed.

Finally send a copy of your plan to national HQ so it can be posted to the National PA Website so others can see it and perhaps use some of your work.

Please look to your Resource Disk for additional resources on planning and samples of approved plans.



Planning Resources

- Resource DVD
- CAP National PA Website

<http://www.cap.gov/pa>