

## Welcome to Module 3: Deployment Planning

Welcome to Module 3 of Field Operations Management. This module will focus on Deployment Planning for field missions. There are 6 key components of deployment planning which will be covered below. These include:

1 - Team Preparedness .....	pp. 1 - 4
2 - Personal Preparedness.....	pp. 5 - 9
3 - Communications.....	p. 10-11
4 - Health and Welfare.....	p. 12
5 - Human Resources, Finance, and Administration.....	pp. 13 - 14
6 - Logistics .....	p. 15
7 - Recap .....	p. 16

### Part 1 – Team Preparedness

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Team preparedness is an essential part of deployment planning. It refers to measures taken to ready the team for the mission ahead. Team preparedness can also provide a platform to design effective, realistic and coordinated planning, reduce duplication of efforts, and increase the overall effectiveness of aid response. Simply put, the better prepared a team is for a mission, the more successful it will be.

There are 5 key aspects of team preparedness.

### **1 - Team selection**

When selecting your team, you need to think about what skills are going to be required for the particular field mission and who would be the most appropriate choice. You should also consider a gendered approach depending upon your beneficiary focus as well as ethnic, religious, and linguistic diversity. Ask yourself this: how might your team be perceived by authorities and local populations? The more respectful and adaptive you and your team are to your host community, the more likely they are to be hospitable and cooperative.

As part of team selection, you also need to create a contact list. Email addresses, phone numbers, postal addresses, and other contact details (including next of kin) should be compiled and shared so that everybody is clear about who and how they can contact one another. WhatsApp is another common means of contact but remember this requires WiFi connection which is not always available in the field.

Bonding is another important part of team selection. You must consider how you can bring the team together. You will face some difficult situations in the field and so even those less experienced team members need to be able to trust one another and be aware of who to contact in case of emergency. Prior to departure, conduct bonding exercises. These can be either virtual such as on Zoom, WhatsApp, or Skype,

or preferably physical meetings so that the team can connect and get to know one another.

## **2 - Clarity of purpose**

It is very important that team members understand what exactly their roles and responsibilities are to avoid overlap, confusion and miscommunications. You should provide written mission instructions and job descriptions for each team member. Every team member should also understand the length of their engagement on the mission and what would happen if the mission is extended. This is always a possibility as are transferrals to other teams. Being aware of these considerations will help them to plan their personal lives around their engagement with the mission.

It's also necessary that individuals understand their level of authority within the team. This will ensure that they do not overstep boundaries and that there are no security problems upon deployment. Their level of authority should be outlined in their job descriptions as should the chain of command and contact.

## **3 - Security and communications planning**

As highlighted in previous training modules, you need to conduct, share, and discuss a security assessment with your team prior to departing for your mission. You need to be clear about who is ultimately responsible for making decisions on mitigation and cancelling the mission if it is too dangerous. You also need to ensure that every team member has had the appropriate level of security training so they are not shocked or distressed by security incidents that may occur on mission. To aid this effort, check that everyone understands your organization's standard operating procedures, immediate response techniques to security incidents, and communication protocols.

#### 4 - Mission outline

The team should be briefed with a mission outline so that they can have appropriate expectations of what the mission will entail. This should include the dates and times of the mission and key details such as travel and accommodation plans. Create a detailed itinerary of flights and other means of transport, destinations, and timings to make the team feel comfortable and informed. Also make sure to tell team members if the accommodation has running hot water, access to wifi, and other facilities. The more detail you can provide them with, the better prepared your team will be for the mission ahead.

#### 5 - Team equipment

There are several factors which pertain to preparing team equipment. These include:

- *Responsibility* - You must determine who will be responsible for accessing/hiring, managing, and maintaining team equipment.
- *Needs assessment* - Consider who will be using the equipment and what specific requirements they might have.
- *Back-up or secondary equipment* - What equipment might you need in case the original doesn't work? Do you have copies of the originals and are they easily accessible?
- *Equipment marks* - These are always helpful to promote visibility and identification in case of multiple agencies responding to the same emergency or conflict.
- *Protection* - In the event of natural disasters or insecure situations, your equipment may be damaged or looted. Consider what preventative efforts you can implement to stop this from happening.

- *Plan B* - If your equipment fails and the secondary/back-up equipment is damaged too, then you need to be prepared. Consider more portable and perhaps more inexpensive or sturdy alternatives.

**To recap, there are 5 key aspects of team preparedness:**

- 1 - **Team Selection** - this involves identifying team members, creating contact lists, and team bonding.
- 2 - **Clarity of Purpose** - in terms of mission instructions/job descriptions, length of engagement and levels of authority.
- 3 - **Security and Communications** - meaning security assessments, responsibilities and leadership, training, standard operating procedures, and communication protocols.
- 4 - **Mission Outline** - regarding dates and times, travel and accommodation plans.
- 5 - **Team Equipment** - including responsibility, needs assessment, back-up, markings, protection and plan B.

## Part 2 – Personal Preparedness

When people leave their home for a long period of time for a field operation, they need to understand both the emotional, physical and mental demands that they

may be confronted with; they need to feel personally prepared.

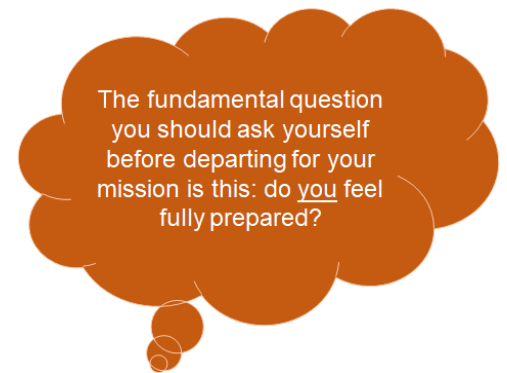
There are 7 components of personal preparedness that we are going to cover. These include: mental and physical health, equipment basics and recommendations, cash and identity considerations, family and house coordination, advice in the event of worst case scenarios, secondary readings, and contracts, permits and authorizations.

## 1 - **Mental and physical health**

If you have any reservations, problems at home, or other commitments that might distract you when on mission then you should raise them with your organization.

Furthermore, if you've just come back from another mission and you're physically tired and/or mentally drained, consider if it is appropriate that you immediately proceed onto the next mission. Perhaps it would be better to rest and recuperate first.

In terms of physical health, make sure that you have your prescription medications prepared as these may not be accessible in the field. You also might need a doctor's certificate to certify you are fit to work and to travel and don't forget to make sure you have the appropriate health insurance for wherever you will be travelling to.



## Documentation

- Passport
- National identity card
- Driving license
- A copy of your contract (explaining what you're going to be doing)
- Authorizations (take a copy for the public authorities)
- Contact list of colleagues in the field and at home
- Maps of the area
- Accommodation details

### 2 - Documentation and Equipment

Here is a recommended checklist of all of the documentation you will need on every mission. Documentation is very important. We recommend you have photocopies of all of the following in case of loss or confiscation.

Here is a recommended checklist of all of the equipment you will need on every mission. Equipment is very important. We recommend you organise your equipment weeks in advance before departing for the mission. Also consider back-ups in case of loss or confiscation.

## Equipment

- First aid kit
- PPE (such as hand sanitizer)
- Tent (if you're not in formal accommodation)
- Mosquito net (if you're not in formal accommodation)
- Cooking equipment (if you're not in formal accommodation)
- Food and drink (if you're not in formal accommodation)
- Appropriate clothing
- Phone charger
- A phone
- A computer/laptop
- Adapters
- A torch
- Spare batteries (useful in the event of a natural disaster)

### 3 - **Cash and identity**

You will need both the currency most used in the country of your mission as well as local currency if it is available. Don't take large sums of money and avoid carrying change/coins if you can. If cash notes are unavoidable then check if there will be ATM access and whether you can use credit or debit cards. Also make sure you have your ID and spare photographs to hand as these are useful if you are required to access certain areas or obtain additional travel permits .

### 4 - **Family and house planning**

It can be difficult to leave your family behind at home when you depart for longer missions. Nevertheless, here are some steps you can take to ease the departure process.

- Give your family and close friends your contact details and those of your



organization and field office. You might not always have telephone access or WiFi connection so also make sure that they are aware of your travel itinerary regarding departure and return.

- If you have young children in school, make sure the school also has your emergency contact details.
- Consider the changing regulations for COVID-19 and if you need to quarantine when you return. This needs to be communicated with whoever you live with.
- If you're living at home alone, make sure your next of kin has your contact details and if you live with pets then don't forget to make arrangements for someone to take care of them in your absence.
- Think about what you're going to do with regard to your water, electricity, and security arrangements for your house while you are away.
- Create an automatic response on your email and phone recorder to notify people of your absence if they try to contact you. Make sure that the automatic reply includes your details in case of emergencies.

## 5 - **Prepare for worst case scenarios**

Unfortunately, field missions can be highly dangerous and injuries, deaths and kidnappings can occur. It is therefore important that your emergency contacts are shared with your organization so that they can let them know of your predicament.

Many organizations will organize security questions and answers with you in case of kidnap events. These are standard questions and answers where upon hearing the message, the listener is aware that you're in a difficult situation. In the event of a fatality, make sure that you have prepared a will and consider life, health, injury, and medevac insurance.

You should also organise your financial arrangements before you leave for your mission. For example, you could elect an executor for your estate should things go wrong.

## 6 - **Secondary readings**

It's always useful to do some secondary or contextual reading before you deploy on a mission. If you're going to another country, read up on the national profile and socio-economic background. Explore what restrictions there are, the health and security conditions, what vaccinations you need to have before you leave.

Alternatively, if you're deploying nationally it's useful to keep up to date with the current news via the local media. Research who the government advisories are at this point in time and what stance they take on certain issues pertaining to your mission. You should also know what the COVID-19 regulations are as well as how to adapt to local weather conditions, climate, and landscape.

## 7 - **Contracts, permits and authorizations**

Individually you should have an employment contract but you may also have one as a team tailored to your upcoming mission. All of the following questions are important factors that you should consider when negotiating and signing said contracts:

- Is the contract clear about your responsibilities and length of employment?
- Are the financial procedures comprehensible with regards to mission expenses?
- Are the appropriate international and national travel permits provided by the agency deploying you?

- Does the agency or organization you work for hold the necessary authorizations for your field mission?

**To recap, there are 7 key aspects of personal preparedness:**

- 1 - Mental and physical health
- 2 - Equipment
- 3 - Cash and identity
- 4 - Family and house coordination
- 5 - Considerations in the event of worst case scenarios
- 6 - Secondary readings
- 7 - Contracts, permits and authorizations

## Part 3 – Communications

A critical part of field mission planning is the communications strategy. This includes communications with the field office, the home office of the organization, local and district authorities, the communities you are supporting, and your emergency contacts. There are many communications options and means to choose from including mobile phones, high frequency (HF) and very high frequency (VHF) radios, email, Zoom, Skype, Teams, WhatsApp, and of course face-to-face contact.

As part of your assessment for the mission, you need to map out what's going to be the most useful communication tool. If you're in convoy when travelling, you need to look at vehicle to vehicle channels and protocols. For example, if you're using HF or VHF radio then make sure staff are trained on how to use this equipment, especially if the convoy is diverted or broken up. Alternatively, if you're using mobile phones to

stay in contact then you need to know if there will be mobile network coverage, and if WiFi is available at your accommodation.

It is very important to create and take with you a contact list so you can reach your team members and emergency contacts at all times. The contact list should contain the details of your team (especially if the team is going to split up during the mission), emergency contacts, your field office, the local and district authorities, and the communities you're going to be entering and interacting with.

You also need to check if there is a 24/7 support line for your team. This should be provided by your field office in case of emergencies, unexpected difficulties on the mission, or problems at home. Home to field and field to home communications are significant and should not be forgotten. You should make sure that there's an automatic reply for those trying to contact you when you are out of office in the field. This reply should be in the forms of an automatic email response or a telephone message as previously mentioned above.

Finally, make sure that you have batteries, chargers, and a backup power supply for whichever communication tool you plan on using. These can be key to survival in emergency situations.

## Part 4 – Health and Welfare

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There are several dimensions to health and welfare that have been covered in separate parts of previous modules. Here these shall be brought together in one space for ease of access and recall.

As previously mentioned, it's important that your team members are mentally and physically healthy so that they can feel ready for the field mission ahead.

You also need to ensure that everyone possesses the appropriate medical insurance and that medical evacuation arrangements/strategies are in place in case of emergency or unforeseen dangers.

Prepare health documents (such as health certificates, proof of vaccinations, and health insurance policies) for authorization and identification, as well as a contact list. This should contain the details of team members, local and district authorities, and emergency contacts and should be used if a team member is injured or unwell

in the field.

Do not forget to bring a first aid kit and other necessary equipment with you on your mission. Additionally, take prescribed medications just in case they aren't freely accessible in the area that you're traveling to.

These acts of prevention and preparedness for health and welfare risks during your field mission are essential. They will help to ensure your own and others' wellbeing.

## Part 5 – Human Resources, Finance, and Administration

Field missions require support from human resources, finance, and administration.

**Human resources or HR** are responsible for contracting both yourself and your team. They're often also responsible for training to make sure that you have the necessary skills required to conduct your mission. HR should be available to support you 24/7 in case any issues occur within your team during the mission or in the event of emergencies. Furthermore, HR are responsible for making sure that things are coordinated properly and as planned. For example, they ensure that paperwork such as the code of conduct is signed by all team members.

**Finance** is a multifaceted topic. For field missions, you should think about the following financial considerations:

- Project cash – This comes from your organization and can be designated to

specific areas or activities within the project.

- Personal cash - This comes from your own funds and is for you to spend at your own discretion.
- Emergency cash - Quite often teams will take emergency cash (in addition to project and personal cash) in case you run into unforeseen problems.
- Invoicing and payments - These forms need to be copied and stored for recordkeeping and verification.
- Realist project expenditure - It's important to be clear about what is classified as eligible project expenditure so you do not go hugely over or under budget.
- Realistic personal expenditure - You should consider your own finances, budgeting, spending and how to keep track of them.

**Administration** is necessary so that the team understands agency/organizational procedures and expectations over the course of all stages of the mission. Some organizations deal with administration on an individual personnel basis whereas others have an administration department that they outsource work to. In either case, those involved should be able to answer the following questions:

- What are the rules and procedures for working in the field for your particular agency?
- Does the organization you work for have forms and templates specifically tailored to your project and activities e.g. assessment reports or monitoring and evaluation templates?
- Do you have copies of these forms and templates on your laptop and are they easily accessible?
- What are your agency's emergency procedures in the event of disasters, conflicts, or other unprecedented events and how are these recorded?

- Are there specific rules and regulations already in place that you must comply with when managing an emergency situation?
  - What forms do you have to fill in?
  - Who do you have to advise and how do you advise them?
- What record keeping do you need to do during the course of your mission, e.g. daily time sheets, incident reports, etcetera?

## Part 6 – Logistics

The final part of field mission deployment is logistics assessment and planning.

Every team leader should have a plan detailing the coordination and implementation of the upcoming complex operation. Most teams will also have a logistician, depending upon the size and complexity of the operation.

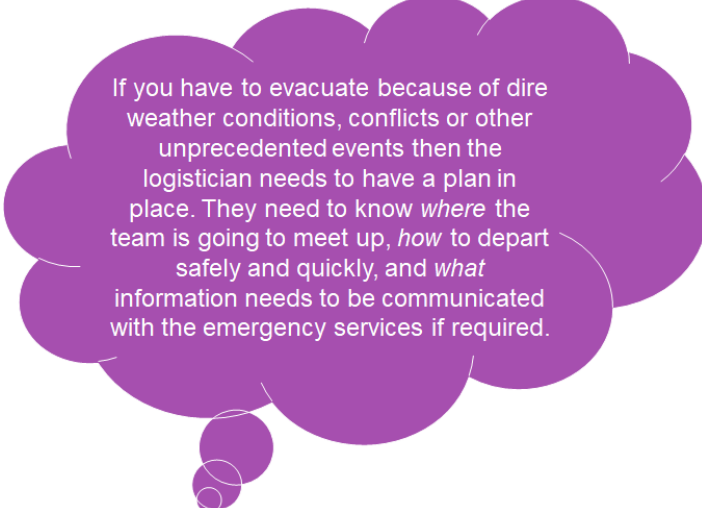
The logistician is responsible for the following:

- Team transport and meetup locations
- Vehicle checks before departing on a mission
- Making sure the vehicle has fuel, working seatbelts, a spare tire and a car jack
- Ensuring team and individual supplies are present and accounted for



- Power provision if missions take place in remote rural locations off the grid
- Evacuation planning and preparedness.

These logistics factors are all part of a proper support services plan and assessments conducted prior to your field mission.



If you have to evacuate because of dire weather conditions, conflicts or other unprecedented events then the logistician needs to have a plan in place. They need to know *where* the team is going to meet up, *how* to depart safely and quickly, and *what* information needs to be communicated with the emergency services if required.

**To recap, there are 6 key aspects of deployment planning:**

**1 - Team Preparedness** – team selection, clarity of purpose, security and communications planning, mission outline, team equipment

**2 - Personal Preparedness** – mental and physical health, equipment and documentation, cash and ID, family and house planning, prepare for worst case scenarios, secondary readings, and contracts, permits and authorizations

**3 – Communications** – field office, local and district authorities, emergency contacts, communities, means of communication, contact list

**4 - Health and Welfare** – medical insurance, health documents, first aid kit, vaccinations

**5 - Human Resources, Finance, and Administration** – contracting, support, code of conduct; project, personal and emergency cash, invoicing and payments, realistic project and personal expenditure; organizational procedures and expectations

**6 - Logistics** – transport and meetups, vehicle checks, fuel and supplies, power provision, evacuation planning and preparedness