

VPFSC BN1

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From: Doug Mercer, Vice President Field Services

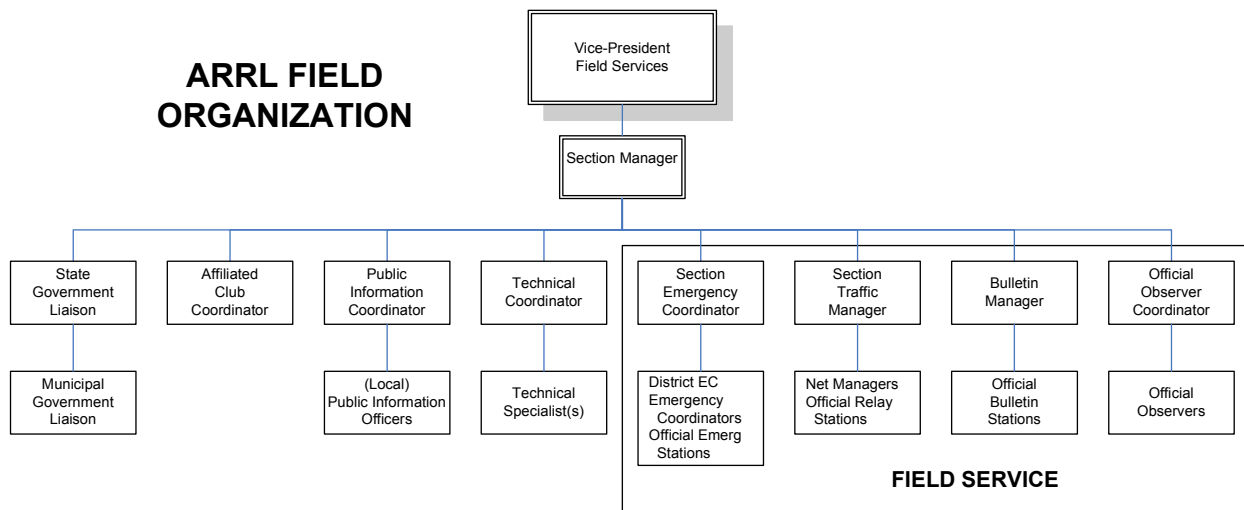
To: Section Managers

Information: President, RAC

**BRIEFING NOTE 1 –  
DEVELOPMENT OF A RAC FIELD ORGANIZATION  
WITH A MODERNIZED FIELD SERVICE**

BACKGROUND

One of the decisions flowing from the RAC vision process was the need for a Field Organization (FO) in order to create a functional, operational level, administrative system to better connect the national headquarters functions with the Amateur community in general. It was also recognized that a functional FO was essential to successful operation of an effective Field Service (FS). The two go hand-in-hand and are integrated in the ARRL model (Figure 1). It is not intended that the model simply be adopted, but that it be used at the start point for a review to identify a structure applicable to the Canadian environment. The RAC vision process also recognized that a comprehensive review of the FS was needed in order to properly fulfil our public service function and to be interoperable with the Incident Command System (ICS) / Incident Management System (IMS) now being implemented by governments throughout North America.<sup>1</sup>



**Figure 1** ARRL Field Organization

PURPOSE

The purpose of this Briefing Note is to provide initial guidance to SMs on their role within the renewal process.

<sup>1</sup> The two terms are virtually interchangeable, ICS frequently used by the first response communities and IMS at policy-level in some government organizations. The underlying theory (doctrine) is the same.

## DISCUSSION

### Change Management Process

The task is multi-faceted and will undoubtedly involve policy recommendations upward to the RAC Board of Directors in addition to developing the new FO structures and modernizing the FS. This requires a fresh look at management practices. Equally important is leadership development and succession planning so that the result is self-sustaining. Finally, this must be done in an open and transparent manner so that it is accepted and supported by the Amateur community as a whole.

A successful change management process requires the participation of as many knowledgeable people and subject matter experts (SME) as practical, and include the already serving volunteers. But the process also needs to be guided so that the output of working groups and SMEs, and inputs from the field, are brought together as a rational end-product. If the end-state is a functioning FO obviously it is the elected Section Managers who, collectively, should be the primary group to oversee the developmental process. To that end I seek your support in the form of a "Field Organization Council" composed of yourselves. In the short term the Council will serve as the review's "steering group" resetting priorities, appointing working groups, approving the results, and if necessary formulating recommendations for an RAC policy change.

The national-level field services advisors are available to the Council and working groups for advice. These advisors are:

Ken Oelke, VE6AOF	National Emergency Coordinator
Hew Lines, VA7HU	National Traffic System Coordinator
Dave Drinnan, VE9FK	National Training Coordinator
Merv Halvorsen, VO1TSA	Manager, National Amateur Radio Emergency Database
Ian Snow, VA3QT	Special Advisor

### Priorities

I will leave it to the Council to formally establish priorities, the work plan, and the appointment of working groups. The advisors have suggested that the work can be divided into two major divisions, the development of the remaining four "components" of the FS as one and renewal of the FS as the other. Within the FS, prior discussion with the advisors suggests that renewal of the ARES is the first step. We are fortunate in that ARES Ontario has already begun its own review and this could potentially serve as the core of a national review.

Hew and Ian have strongly advocated that the key to the FS renewal process is defining the "to do what". This step leads to the next topic.

### Management of Training

We are fortunate in that Ian has experience as a training manager in the Canadian Forces and its "Individual Training and Education System" management model. A form of this model was adopted by Human Resources Development Canada and is utilized by community colleges, industry and labour organizations in their Sector Group and ISO 9000 standardization processes. When properly exploited the model makes the distinction between training practical skills and their associated knowledge elements, and education which has a strong correlation with leadership and management abilities, and therefore impacts on succession planning. There are four "steps" in the development/documentation process:

- The Specification. This document lays out in major groupings the tasks, skills, and knowledge required in each of the "developmental periods" associated with progression and appointments. Each task, skill and knowledge requirement has a unique code so that it can be linked to specific reference material identifying the scope of the teaching point and tracked to the specific training

event where it is delivered. This foundation document drives the continuous improvement process which in turn is the engine that keeps the training manuals current, and lectures focused on the specific target audience. This step is normally performed by experienced practitioners.

- Training Standard. This document both breaks out the specification into Performance and Educational Objectives and selects the specific reference document that identifies the scope and depth of the training requirement for a given developmental period (sometimes down to the paragraph). This is a natural extension of developing the specification and should be done by the same working group to retain continuity.
- Training Plan. This document further refines the POs and EOs into teaching blocks. It also identifies the training methodology to be followed (e.g. self study, on-line courses, classroom training, practical exercises, etc.) and the training resources required. This step is normally conducted by experienced instructors.
- Lesson Plans and facilitator guidance. This is the actual training/education delivery content and is prepared by specialized instructors or SMEs.

All four steps are interactive to some degree; however, the function of each step and the roles of the practitioners, SMEs and trainers must be respected or “training creep” comes into play when the instructor begins to teach what s/he knows after years of experience rather than what the student needs to know to be successful performing their function within an operating team. The same can apply on the educational front where forcing advanced knowledge before the student has the practical experience to put it in context can lead to student frustration and wasted resources.

#### Personal Preparation

The advisors will provide selected reference materials to support your deliberations. We are now in the process of obtaining the relevant ARRL documentation to better understand how its Divisional and Field Organizations function. In the meantime, I highly recommend that you review the RAC Constitution, Administration Manual and Manual for Directors for an appreciation of the strategic role performed by the Directors, and the operational role played by the Executive. Part of our mission is determining where the boundary lies between the strategic and headquarters administrative functions and the FO delivery of services to RAC members, Amateurs, and the public.

I also urge you to familiarize yourself with the ICS/IMS philosophy and recommend to your reading the *Incident Management System (IMS) for Ontario* available at <http://www.emergencymanagementontario.ca/english/professionals/IMS/ims.html>. The Province of Ontario has also agreed to certify Amateur Radio operators who complete the IMS-100 *Introduction To IMS in Ontario* on-line course package (same website) when the Amateur’s home province does not offer one.

#### Draft Specification

Enclosed at Annex A is a draft specification that Ian has prepared for the ARES Ontario review.<sup>2</sup> At this point it lacks the detail communications operator tasks, skills and knowledge elements that ARES operators need nor does it address appointments above Emergency Coordinator, but it will serve for Council discussion purposes with respect to topics such as leadership, management, and interpersonal communication skills.

#### Council Secretariat

One of the key requirements for a successful continuous improvement process, effective training development, and keeping training materials current is an administrative support organization charged

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<sup>2</sup> Secretarial Note: Annex A is now part of Briefing Note 2

with managing the review process and maintaining critical documentation and reference resources. It would also keep the proceedings of this Council. If you know of a volunteer with the appropriate administrative skill sets please recommend that person(s) to me for consideration and appointment.

### CONCLUSION

As part of the first truly national body representing Canadian Amateur Radio operators both nationally and internationally, we have been presented with a unique opportunity to apply the lessons learned over the past decade and to create a Field Organization that reaches out and is inclusive of the clubs and individual Amateur Radio Operators. We also have the opportunity to modernize the Field Service and align the ARES with ICS/IMS management model now utilized by most of its client base. I look forward to your active participation in this process.

73,

Doug Mercer, VO1DTM  
Vice-President Field Services