



The Operational Plan

A unique tool for moving from a field intention to a secure operation

The Operational Plan is the central tool that makes it possible to prepare, coordinate, secure and steer a field operation. It brings together in a single document all the elements needed for a mission to succeed.

Objectives & Participants

Scientific, educational, logistical — supervisors and responsibilities clearly defined.

Planning & Itinerary

Backward planning, locations, transport, accommodation and detailed schedules.

Resources & Communication

Food, equipment and means of communication available.

Safety & Emergencies

Risk management, emergency plan and accident procedures built in.

i Its purpose: to enable a team to know **who does what, where, when, with what means**, according to which procedures, and with which safety criteria.

What is the Operation Plan for?

Turning a complex activity into a controlled operation

A field operation is always multi-dimensional: it involves people, locations, travel, equipment, meals, unforeseen issues, responsibilities and objectives to achieve.

→ **Make the operation readable**

For the whole team, from the very first glance at the document.

→ **Anticipate needs**

Identify and prepare the resources required before departure.

→ **Allocate responsibilities**

Each member knows exactly what they are responsible for.

→ **Secure decisions**

Avoid critical oversights and make validation by management easier.

→ **Emergency reference document**

Ensure reliable handover between people in all circumstances.

It is not just an administrative file. It is an **operational management tool**.



A central sheet to frame the operation

The heart of the system: the Operation Sheet

The Operation Sheet summarises the structural information. It acts as a **general dashboard**: within a few minutes, someone outside the team can understand the operation, its level of complexity, and its critical points.

Operation identification

- Operation name
- Relevant programme
- Start and end dates
- Departure and return locations
- Total duration
- Type of activity
- Level of difficulty

Management & Resources

- General and specific objectives
- Responsible people
- Participant and supervisor headcounts
- Communication methods
- External resource or "guardian angel"

- ✓ This sheet enables anyone outside the team to understand the operation in just a few minutes.

A coordination tool before, during and after

The Operation Plan organises the preparation timeline

The tool incorporates retrospectives for the key dimensions of the operation. Each line can specify the progress status, due date, urgency level, alerts and comments.



What is visible in the retroplanning

- What is ready
- What remains to be done
- What is delayed
- What needs to be decided

☐ The Operation Plan thus becomes a **collective management tool**: it makes the true state of preparation visible to the whole team.

An operation translated into concrete organisation

From the field, schedules, resources and responsibilities

The Operation Plan goes down to the practical level needed for execution. The goal is simple: so the team does not depend on oral memory or scattered messages.



Participants & Contacts

List of participants, supervisors and emergency contacts clearly documented.



Detailed Schedules

Day-by-day programme with the precise timings of each activity.



Locations & Itineraries

Maps, GPS coordinates, study areas and documented routes.



Transport & Accommodation

Vehicles, bookings, fuel and overnight stays planned.



Equipment & Catering

Inventory of group equipment, menus, meals and dietary requirements.



Communications

Internal and external contacts, communication means available in the field.

Everything critical to the operation must be **written, verifiable and shareable**.

A safety and risk management tool

Anticipate incidents before they happen

The Operation Plan includes a section dedicated to risk management. For each identified risk, the tool allows you to specify the level of severity, preventive measures, procedures to follow, responsible people, and emergency contacts.

Types of risks identified

Environmental & Weather-related

Physical & Health-related

Human & Material

Cancellation & Evacuation Criteria

Emergency Plan — Action logic

01

Stay calm

02

Stabilise the situation

03


Communicate with the external point of contact

04

Mobilise external help if necessary

05

Document the incident

 Safety is not dealt with afterwards. It is **built into the operation from the outset**.

