CAP Pamphlet 40-4

CIVIL AIR PATROL

Transition Guide:

A Workbook

for Incoming Wing Commanders

October 2020

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Introduction

Serving as a wing commander is one of the most rewarding positions in Civil Air Patrol. It is also one of the most important. The success of Civil Air Patrol's three missions (aerospace education, cadet programs, and emergency services) is based on the experiences that occur across the nation in the wings and units for thousands of volunteers who serve. There is much for new wing commanders to learn and do. While the Region and Wing Commanders College provides the foundational knowledge you need to be a successful commander, some commanders are unable to attend before taking command. This guide is intended as "just in time" training to focus your efforts on what needs to be done to take   command of a wing. If you read the material and complete the exercises in this guide before taking command, it will help you be compliant and meet expectations. This guide is not designed to replace the Region and Wing Commanders College. It is only a tool to help you step up to the challenge of taking command. You will want to attend   the Region and Wing Commanders College as soon as you can to access more information that you will need for long term success.

This workbook contains the following topics and worksheets:

- Where do I go for help?
- My Staff
- Operations and Emergency Services
- Aerospace Education
- Cadet Programs
- Finance
- Budgets
- Compliance
- Logistics and Supply
- Goal Setting
- Planning
- eServices
- Planning the Change of Command/Taking Command

Each topic has been carefully selected and crafted to help you through your first 2-3 months of command until you are scheduled to take the full Region and Wing Commanders College. This brings up an important reminder: the JIT workbook is not a substitute for completing the entire Region and Wing Commanders College. It's designed to be just what it says, "just in time."

Where Do I Go for Help?

The job of the wing commander can be daunting and intimidating. Your first task on this journey is to realize that you are not alone. You have help. If you are taking command of a wing, the wing staff should be able to assist you. Ask them about the strengths, weaknesses, character, and history of the wing. They have a wealth of information to share. Ask them now. Don't wait.

Several members in the region have been in your situation before and figured out how to be successful. Who are they? How do you find them? Does the wing have continuity binders that might help you? If not, start building them in critical areas as you learn so you can assist your replacement. One of the duties of commanders is to ensure there is a bench of leaders ready to take key positions in the organization. Developing your members is one of your most important jobs. Mentors are essential for your members also. If you don't have someone who can help you within the wing, your next step is to contact the next higher echelon for support. Your region commander needs to be your first contact. The entire purpose of the national and region staff is to support the wings so they can accomplish the mission. Use these resources wisely!

The list of contacts below will help you build a support network. Fill in the entire list with the names, phone numbers, and email addresses of knowledgeable personnel. If possible, don't leave any line blank. Most importantly, contact each of the members for advice and guidance. When a problem or challenge arises, you will be armed with a list of experts to help you succeed. You can also begin to network with other wing commanders. The other wing commanders in your region will have a wealth of knowledge and many experiences to share with you.

As you find mentors who can help you as a commander, understand that it can take a few tries before you find the perfect mentor. We can learn from anyone, but a special relationship develops between a well-paired mentor/mentee. In addition to finding a good fit for your personality type, mentors need to be experts in the areas in which you need help and open to helping others. An unmotivated mentor is not a good mentor. You need an active support network!

My Contacts

My Region Commander:

      Name:_____Phone:_____

      Email: _____

CAP Chief Operating Officer

      Name:_____Phone:_____

      Email: _____

CAP-USAF Liaison Region Commander

      Name:_____Phone:_____

      Email: _____

Wing Financial Analyst for my Wing

      Name:_____Phone:_____

      Email: _____

My Mentor:

      Name:_____Phone:_____

      Email: _____

My Wing Administrator

      Name:_____Phone:_____

      Email: _____

My Wing Command NCO

      Name:_____Phone:_____

      Email: _____

My Wing Inspector General

      Name:_____Phone:_____

      Email: _____

My Wing Legal Officer

      Name:_____Phone:_____

      Email: _____

My Wing Director of Finance

      Name:_____Phone:_____

      Email: _____

Director of Logistics:

      Name:_____Phone:_____

      Email: _____

Transportation Officer (ground vehicles) :

      Name:_____Phone:_____

      Email: _____

Director of Cadet Programs:
　　　Name:_____Phone:_____
　　　Email:　_____

Wing Chaplain:
　　　Name:_____Phone:_____
　　　Email:　_____

Emergency Services Officer:
　　　Name:_____Phone:_____
　　　Email:　_____

Director of Aerospace Education:
　　　Name:_____Phone:_____
　　　Email:　_____

Director of Operations:
　　　Name:_____Phone:_____
　　　Email:　_____

Director of Communications:
　　　Name:_____Phone:_____
　　　Email:　_____

Director of Education and Training:
　　　Name:_____Phone:_____
　　　Email:　_____

Public Affairs Officer:
　　　Name:_____Phone:_____
　　　Email:　_____

Director of Personnel:
　　　Name:_____Phone:_____
　　　Email:　_____

Administrative Officer:
　　　Name:_____Phone:_____
　　　Email:　_____

Checklist for new wing commanders:

☐ Obtain an **out brief** from your predecessor if possible. Topics should include:
    a. Areas of concern (units, members, finances, equipment, facilities, contracts, CI, unattained goals)
    b. Up and coming command and staff officers and NCOs
    c. Current projects (missions, conferences, activities, schools, training)
    d. Location and date of change of command ceremony
    e. Commanders who are nearing the end of their term

☐ Appoint or reappoint **wing testing officer** and alternate in eServices Personnel Duty Assignment per CAPR 40-2.

☐ Use CAPF 173 to **audit wing headquarters funds** per CAPR 173-1.
    a. Appoint Finance Committee members in eServices (within first 30 days of command)
    b. Sign new bank signature card authorizations.

☐ Perform **inventory audit** using eServices ORMS per CAPR 174-1, paragraph 2-17.

☐ Obtain and **review all current wing directives** per CAPR 1-2. Review, edit, reauthorize IAW CAPR 1-2 as necessary.

☐ Review **Duty Assignment Report and Committee Report** in eServices Member Reports.
    a. Interview current staff and retain or dismiss. Recruit new staff from the members of the wing by advertising the current vacancies and interviewing prospective candidates.
    b. Appoint new staff in eServices Duty Assignment.
    c. Review or assign appropriate specialty track for each new staff person.

☐ Revise the **wing headquarters organizational chart** as needed.

☐ Review the last **Compliance Inspection report** for your wing.

☐ Review wing **education and training program** and adjust as needed.

☐ Review **wing safety processes** and adjust as needed per CAPR 160-1, paragraphs 2.4.2 et al.

☐ Review **public affairs program** per CAPR 190-1, paragraph 7, et al. If no wing public affairs officer is assigned, you must assume that role until it has been filled.

☐ Review the **wing calendar** on the wing website and update it as needed.

☐ Review the **National Strategic Plan** on NHQs website. Reassess any current **wing goals** or create new ones that align with the National Strategic Plan.

☐ Review **alert roster** in WMIRS and eServices. Adjust as needed.

☐ Review all **your new eServices permissions** and coordinate with staff on who will approve what.

☐ Review all **regulations, pamphlets, and forms** in eServices that you are not familiar with.

☐ Review the **program pages** (AE, CP, ES) on the gocivilairpatrol.com website.

☐ Review the **position description for wing commander** in CAPR 30-1 (I) again.

☐ You are now the leader for your wing, and you or your vice will need to make appearances at appropriate events around the wing. **Organize your calendar** and **determine if you need a vehicle and a budget** to make these appearances. They are essential to your members and your stakeholders.

☐ Read the rest of this **transition guide** for other thoughts on your new role.

☐ Plan on attending **region and national conferences** and events. Learn what is on national and region calendars too.

☐ Take your **wing NCO and/or NCO Advisor** with you on any appearances or events.

☐ Consider making **office call appointments with key state and military officials** with whom the wing has or wants a relationship.

☐ Plan to **continue your personal CAP education and training**, with emphasis on completing RWCC and completing Level V (if not previously completed).

My Staff

An excellent staff is vital if a wing is to succeed. To obtain good staff, advertise current vacancies and interview prospective candidates. Have at least two other trusted persons with you on the interview board. Only seniors may serve in the positions on these charts. The goal is   that a unique individual fills every area, but some of the time, this is not possible.   Some positions combine   naturally, and others do not. For example, one member may be able to serve in administration and personnel.

Sometimes commanders must recruit members to fill critical positions. If you advertise the vacancy to the members of your wing, you may be surprised at the quality of members who apply. Position descriptions are found in CAPR 20-1, *Organization of Civil Air Patrol*. Ensure all staff and committee assignments are appointed in eServices and ensure that those assigned to positions are enrolled in the corresponding specialty track (a Compliance Inspection item). Complete the organizational chart for your wing from the diagrams on the next several pages and discard the diagrams you do not need. Pencil in the names of possible staff on the organizational chart. Note the following:

- While members must complete Level 1 before being assigned to a staff position, successful wing level leaders generally have extensive experience at the squadron.
- The NCO Advisor must be an NCO and cannot serve as commander at the squadron level or above.
- Chaplains have specific professional requirements and cannot serve as commanders.
- The director of finance cannot be the commander and cannot be related to the commander or from the same household of the commander.
- Legal officers have specific professional requirements and cannot serve as the commander and legal officer in the same unit.
- The wing commander cannot also serve as the director of safety.
- If no public affairs officer has been assigned, then the commander must fill this position. After six months, the commander must begin to advance in the specialty track.
- Medical (health service) officers have specific professional requirements.
- The commander cannot serve as the testing officer or assistant.

Boards and committees help commanders manage vital processes in units. Four key committees' commanders should appoint are the Awards Board, the Promotion Board, the Finance Committee, and the Unit Membership Board, using for reviewing transfers into the headquarters squadron. The Finance Committee will be covered in a later section of this guide.

The **Awards Board** must consist of three members and often includes the Director of Personnel. For more information, see the CAPR 39-3, *Award of CAP Ribbons, Medals, and Certificates*.
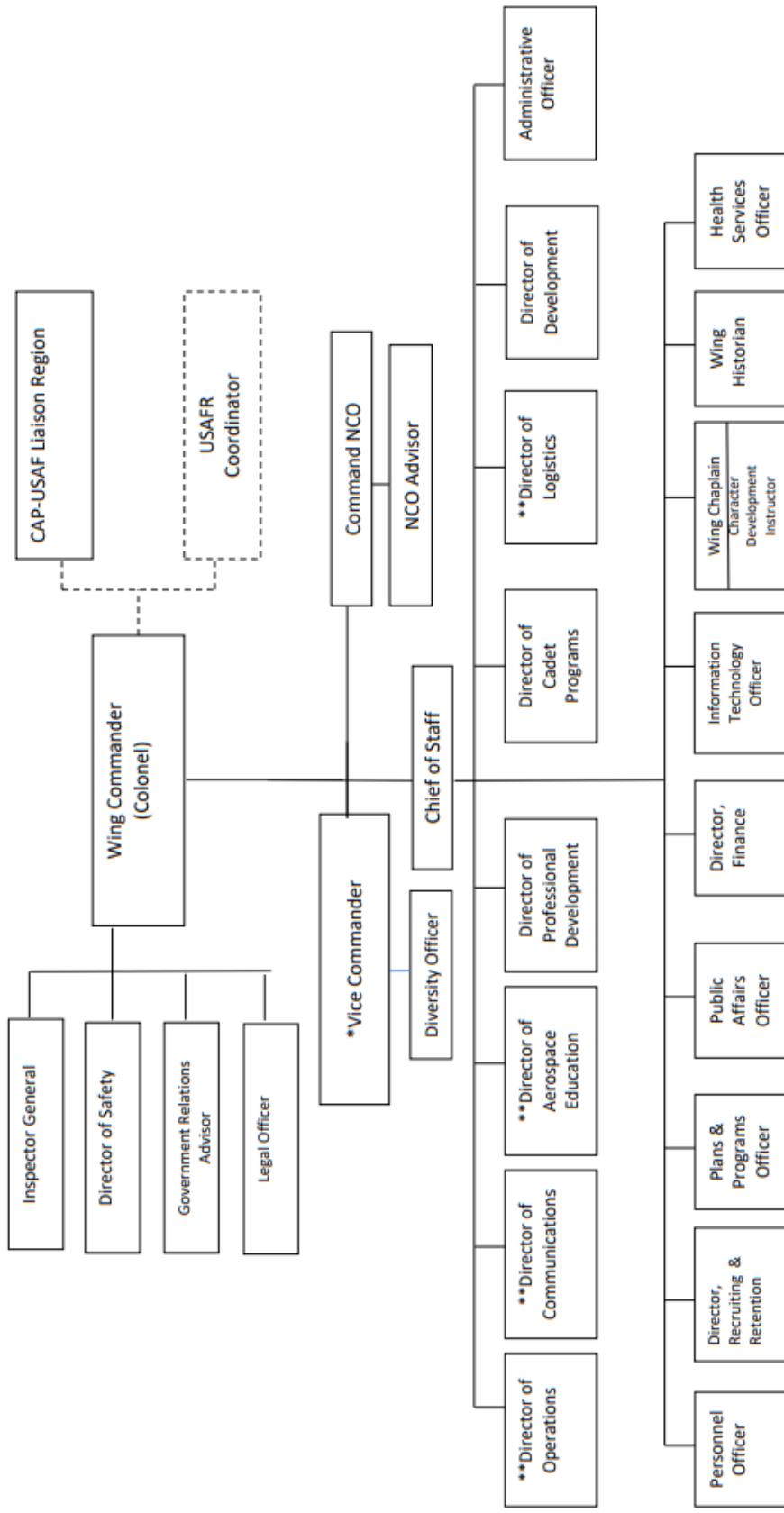
1. _____, Director of Personnel

2. _____

3. _____

The **Unit Membership Board** consists of 1-3 members. For more information, see CAPR 39-2 *Civil Air Patrol Membership.*

1. _____

2. _____

3. _____
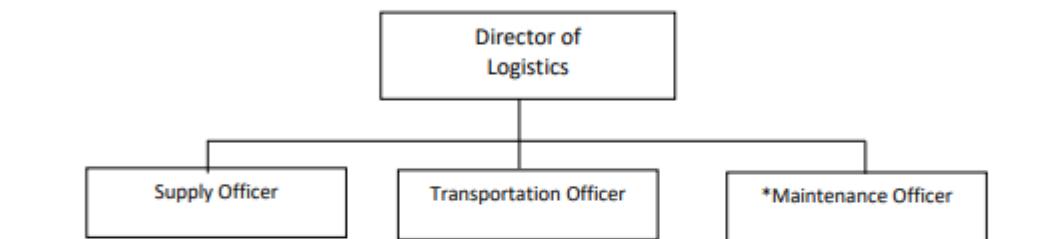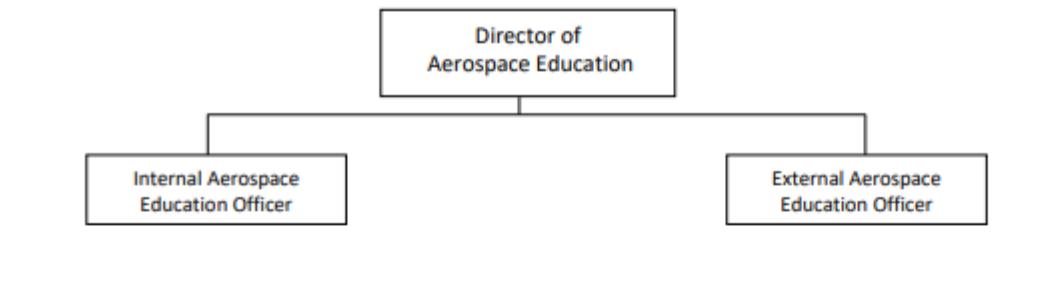
The **Promotion Board** consists of at least three members. The chair should be of a higher grade than those the board considers for promotion. When promoting an NCO, an NCO should serve on the board. Wing commanders are the approval for promotions in their wings for majors (and captains in wings without groups), all professional appointments and senior NCOs. For more information, see CAPR 35-5, *CAP Officer and Noncommissioned Officer Appointments and Promotions.*

1._____

2._____

3._____
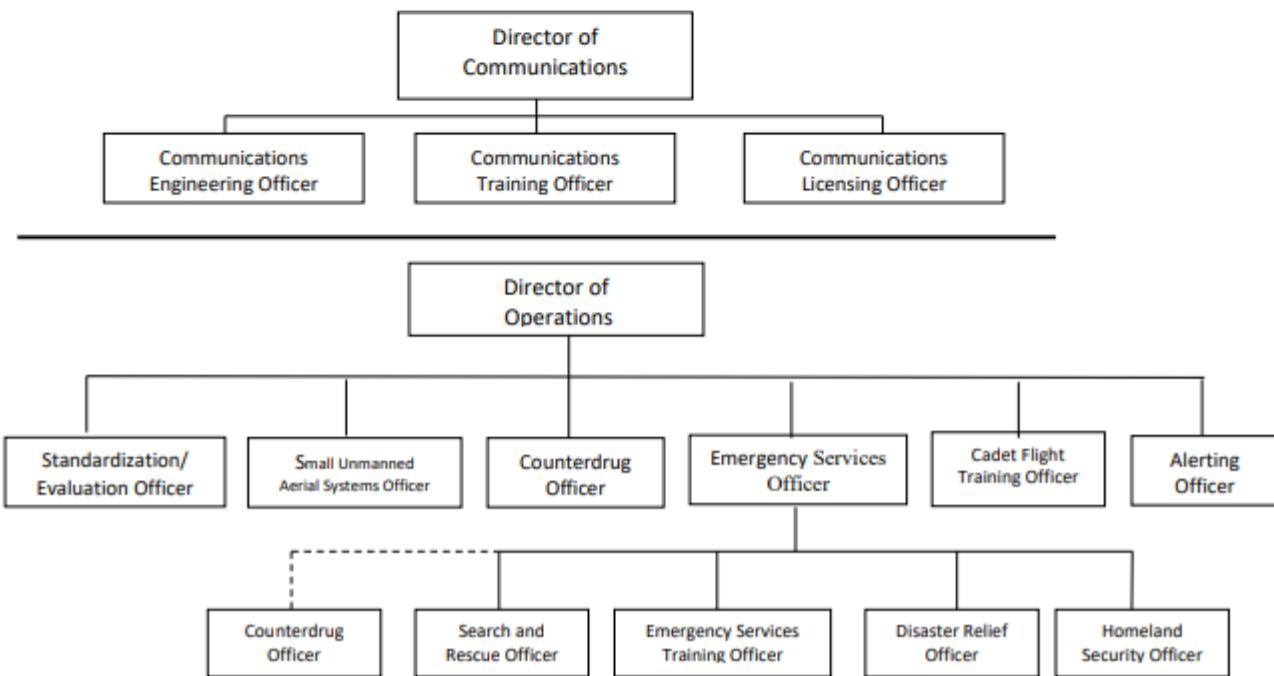
Figure 5—Wing Headquarters Organizational Chart

*Two vice commanders are authorized with the approval of the Region Commander.

**The above staff officers may find it desirable to delegate certain responsibilities to subordinate personnel. If any of these functions are expanded the organizational charts on the following pages are recommended.

Figure 6—Wing Level

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                        ┌─────────────────────┐
                        │     Director of     │
                        │ Aerospace Education │
                        └──────────┬──────────┘
              ┌────────────────────┴────────────────────┐
    ┌──────────────────┐                        ┌──────────────────┐
    │ Internal Aerospace│                       │ External Aerospace│
    │ Education Officer │                       │ Education Officer │
    └──────────────────┘                        └──────────────────┘
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                        ┌─────────────────────┐
                        │     Director of     │
                        │      Logistics      │
                        └──────────┬──────────┘
          ┌────────────────────────┼────────────────────────┐
  ┌──────────────┐        ┌──────────────────────┐  ┌──────────────────────┐
  │ Supply Officer│       │ Transportation Officer│  │ *Maintenance Officer │
  └──────────────┘        └──────────────────────┘  └──────────────────────┘
```

*May be placed under the Director of Operations at the option of the Wing Commander.

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                        ┌─────────────────────┐
                        │     Director of     │
                        │   Communications    │
                        └──────────┬──────────┘
          ┌────────────────────────┼────────────────────────┐
  ┌──────────────┐        ┌──────────────────┐      ┌──────────────────┐
  │ Communications│       │  Communications  │      │  Communications  │
  │Engineering Officer│   │ Training Officer │      │ Licensing Officer│
  └──────────────┘        └──────────────────┘      └──────────────────┘
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                        ┌─────────────────────┐
                        │     Director of     │
                        │     Operations      │
                        └──────────┬──────────┘
```

| Standardization/ Evaluation Officer | Small Unmanned Aerial Systems Officer | Counterdrug Officer | Emergency Services Officer | Cadet Flight Training Officer | Alerting Officer |

| Counterdrug Officer | Search and Rescue Officer | Emergency Services Training Officer | Disaster Relief Officer | Homeland Security Officer |

Operations and Emergency Services

Emergency services is one of CAP's three missions. Wing commanders rely on their director of operations (DO) to help them in this mission area.

In today's Civil Air Patrol, the DO is a manager of staff, a coordinator of programs, liaison with other staff agencies or interested agencies and CAP-USAF counterparts, developer of policies and procedures necessary to ensure mission safety and accomplishment, and the developer and implementer of operations plans, programs, and directives.

The director of operations must be able to develop standard operating procedures for the control and operation of CAP aircraft. He or she does not have to be a certified flight instructor or a maintenance officer, even though it would be an advantage to have this experience.

The DO does not have to be a pilot, but in many cases, they will be. DOs who are pilots do not need a current medical. The wing commander may designate any person with an aviation background as the director of operations if they feel that a person can perform these duties.

The DO must have a basic knowledge of CAP aircraft, along with the ability to use computers, navigate eServices, Operations Qualifications, Web Mission Information Reporting System (WMIRS), and interpret data from these systems.

The emergency services officer coordinates ES activities with other staff officers and develops working relationships with state agencies responsible for search and rescue, disaster relief, and other emergencies. The emergency services officer develops and maintains an adequate emergency services force, coordinates with other unit staff officers to determine the status of resources (personnel, vehicles, aircraft, radios, etc.) available for ES missions.

The emergency services officer will also develop training programs to ensure that highly qualified ES personnel are available for SAR/DR missions to support local, wing, and region ES programs.

OPERATIONS WORKSHEET

1. How is the wing active in emergency services?

2. Do you have a director of operations? What are his or her qualifications?

3. Does the wing consistently offer emergency services and communications training?

4. What kinds of emergency services missions are typical in your wing and region?

5. Does the wing have a current alert roster posted in WMIRS? How often is it updated?

6. In what ES specialty qualifications does your wing have mission qualified personnel? In what qualifications does the wing need to increase their capabilities?

Aerospace Education

Aerospace education (AE) is a CAP mission. CAP is responsible for educating its members (internal AE) and the public (external AE). Wing commanders should be aware of the required reports and paperwork for AE. These items appear on Compliance Inspections. When you log into eServices under Aerospace Education, you will find the AE Wing Plan of Action (an annual requirement) link. When you click that link, you will be able to fill out the required forms online. You need to report activities for   the past year, and you need to write a plan of action for the next year.

One program your wing headquarters can enroll in is Aerospace Education Excellence (AEX). This program requires the wing staff to complete a series of AE activities to earn an award. AEX is a tremendous internal aerospace program. To enroll, click the AEX link in the Aerospace Education section on eServices. After you complete the requirements, the wing can request the certificate. For squadrons with cadets, AEX is one of the criteria that can help your units earn the quality cadet unit award (QCUA).

Cadets also have model rocketry as an achievement they can complete. Guides are available to administer this three-stage program. Cadets who complete the program earn a badge. Your wing can host this as a separate activity.

Senior members can earn the Yeager Award by studying aerospace and taking an open or closed book test on its content. Senior members who complete the Yeager Award earn a ribbon to wear on their uniforms and a certificate. The Yeager Award is a requirement for successful completion of Level II in the senior member education and training program.

For some of the larger and/or more established wings, you will have a lot of AE expertise, and many people lined up to help with AE. This is an ideal situation. For smaller wings, your resources may be limited. The main requirement to be a good direction of aerospace education is to be willing to do some work and have fun while doing it.

There are many AE resources available to the wing that are low cost or free. There may be grants you can apply for from the wing or other entities. The Air Force Association offers some $250 grants each year to CAP educators. Local support may also be available from hobby shops or other aviation organizations. Grants may give you money to build your hovercraft, purchase rocketry supplies, build a wind tunnel, etc.

National Headquarters provides wings with 15 different STEM kits, which are hands-on and engaging. The wing or a unit requests a STEM kit through the Aerospace Education section on eServices. Click the CAP STEM Kit link and fill in the required boxes. To be eligible for another STEM kit, the unit must send a report back detailing how the prior kit was used. When the wing uses the STEM kit, the members benefit (internal AE requirement is met), but

the kits are   small enough and portable enough that you can use them for your external requirement by merely sharing that experience with a school or organization. Sharing the kit is external AE and can be reported on your CI. Finally, if one clicks the AE Downloads and Resources link in the Aerospace Education section on eServices, there are books full of information and projects for all ages.

The Aerospace Connections in Education (ACE) program is another way to engage the public. Teachers can enroll in this program and receive lesson plans and materials to teach AE. This program supports grades K-6. Teachers must be senior members in CAP or aerospace education members to receive the materials.

Outside of the free resources above, inexpensive ways to build on the scientific knowledge that is also fun involve balsa wood airplanes. When you set up the room correctly, your AE officer can teach about weight and balance, take-off distance and landing rolls, speed (measuring time and distance) with a simple balsa wood airplane, some fishing line, a central pivot point, and a stopwatch/timer. There are enough activities with a balsa wood airplane that a unit can do an entire year's worth of AE activities using one balsa plane! Go to https://modelaircraft.org/SHOPAMA to purchase a low-cost DVD for the balsa plane education. This DVD has simple instructions explains the science so even a novice instructor can teach AE using it.

There are also aerospace education awards. This is a great tool to help you promote your wing and reward hardworking members. Cadets, seniors, and outside entities may be nominated for the Frank Brewer Award. Teachers who support AE are also eligible for an award. More information can be found at
https://www.gocivilairpatrol.com/programs/aerospace-education/programs/awards

AEROSPACE EDUCATION
WORKSHEET

1. Does the wing have a director of aerospace education assigned? More than one? How long have they been in the program? Any specialty track ratings in AE?

2. What is your wing doing for internal AE? Does the wing headquarters participate in AEX? Has it earned the AEX Award? How well are your units participating?

3. What is your wing doing for external AE?

4. Did the wing submit the most recent AE activity report on time? What did the report suggest about the quality of the wing's AE program?

5. Did the wing complete the AE Plan of Action? Have all the units completed the POA? Have they submitted their completion report?

6. What percentage of the wing staff have earned the Yeager Award?

7. Has the wing applied for any grants?

8. Has the wing ordered a STEM kit? Was the report completed?

9. How many of your units submit award nominations to the wing?"

Cadet Programs

The Cadet Program is one of the three mission areas and has an entire culture of education, training, compliance, and activities that are best handled by a director of cadet programs with a sufficiently resourced staff. However, the commander plays a crucial role in their ability to manage and direct the cadet program.

You will need to complete the Advanced Cadet Protection Policy Course before taking command. Members complete Basic Cadet Protection Policy training in Level 1. CAPR 60-2, *Cadet Protection Program,* explains CAP's zero-tolerance policy against sexual and physical abuse. CAP does not allow hazing because hazing is a form of physical abuse. Cadets must complete Cadet Protection Policy training within six months after their 18th birthday. Finally, commanders must ensure that at least two approved senior members are at all cadet overnight activities.

Cadets participate in leadership, aerospace education, fitness, and character aspects of the cadet program. Sample schedules in CAPR 60-1 will help you understand how units can make a monthly plan to address all the activities cadets need. Cadets sometimes participate in high adventure activities such as rappelling, marksmanship, or cold weather camping. High adventure activities require your approval and risk management. You can learn more in CAPR 60-1, *Cadet Program Management*. And remember, all units must have a web-based calendar of events.

Several activities require commander input and approval, which are critical to the cadet program. Cadets who attend an encampment in the first year are more likely to stay members of CAP. Encampments are a large-scale wing activity that requires up to a year of advanced planning. You can learn more about encampment in Chapter 9 of CAPR 60-1. Encampments immerse cadets into all aspects of cadet life. Cadets who face economic challenges can apply for a Cadet Encampment Assistance Program (CEAP) scholarship through eServices to help with the cost of encampment or uniforms to attend encampment. This scholarship is handled through the wing finance system so wing finance committees should be aware of the program. Wing commanders must assign cadets to the Cadet Advisory Council no later than 1 September each year. CAC meets at the wing, region, and national levels. Cadets who actively participate can earn a ribbon. You can learn more about CAC in CAPR 60-1, Chapter 7, or at
https://www.gocivilairpatrol.com/programs/cadets/activities/cac

Cadets may wish to participate in Cadet Competition. The events vary but include things like public speaking, obstacle courses, fitness circuits, and color guard functions. You can learn more about cadet competition in CAPP 52-4 and at
https://www.gocivilairpatrol.com/programs/cadets/activities/national-cadet-competition/ .

Two cadet teams who compete and win at the wing level and can compete at the region and national level and earn a ribbon for participation in this program. Wings should plan to give cadet teams time to practice and be competitive for all competition levels.

CAP cadets can apply for scholarships and national cadet special activities (NCSA). Cadets must complete an encampment to be eligible to attend an NCSA. Academic scholarships are announced each year and awarded to deserving cadets. Wings approve cadets who apply; larger wings may have review boards to determine which cadets will be selected as green-light applicants for NCSAs. Visit https://www.gocivilairpatrol.com/programs/cadets/cadetinvest/ to learn more. NCSAs are fantastic opportunities for cadets. These include leadership, aerospace, and emergency services as well as career exploration events. Flight academies and the International Air Cadet Exchange are also possibilities. These are   experiences cadets will never forget! You can learn more about them at
https://www.gocivilairpatrol.com/programs/cadets/activities/national-cadet-special-activities/.

Cadets receive a $100 voucher upon earning the Curry Achievement to help them purchase a blues uniform from Vanguard. Wing commanders or their designee should monitor this program through the Cadet Promotions—Reports section of eServices. Vouchers expire in 45 days.   To learn more, click

Commanders also ensure that the wing headquarters and each unit below has at least two members who have completed Training Leaders of Cadets and that Required Staff Training is conducted (as needed for overnight activities).

Commanders are also responsible for the retention and directing that someone contacts first-year cadets who have not attended for 30 days. Unit commanders approve all cadet promotions and awards. Unit commanders also approve accommodations for cadets with special needs.

CADET PROGRAMS WORKSHEET

1. Do units in your wing meet the requirements in CAPR 60-1?

2. How many members of the wing staff have completed Training Leaders of Cadets? How often does the wing host a TLC-Basic or TLC-Intermediate course?

3. Have all members completed the required Cadet Protection Policy training? Have you completed the Advanced Course?

4. How does the wing ensure that any activities requiring RST hold the training? Has the wing conducted any high adventure activities? What process and paperwork were completed for approval?

5. Do the squadrons offer Saturday activities once a month? Does the wing offer a variety of Saturday activities that cadets can participate in (ES, CP, or AE)?

6. How many cadets participated in encampment last year? Did any get CEAP support?

7. What percentage of the cadets have had an orientation flight in the last year? Does the wing host cadet orientation flight days?

8. Did any cadets attend NCSAs or apply for scholarships? Does the wing hold review boards to determine approvals and green-light cadets? Are seniors encouraged to apply as NCSA staff?

9. How many units in the wing earned the Quality Cadet Unit Award last year? Why or why not? How can the wing help this number increase?

10. Who calls cadets in their first year who stop participating? How does the wing support the unit recruiting and retention officer in making improvements to increase retention?

Finance

Very few things can get you in a lot of trouble in CAP, but how money is handled is at the top of the list. It is not difficult to manage funds well with the procedures CAP has in place. These procedures are in place to help you and CAP be a good steward of resources and funds. Learn the procedures and follow the rules explicitly. The 173-series of CAP Regulations explain the policies/procedures, and your wing director of finance and wing administrator are available to assist you in following the rules. Read the finance regulations carefully!

The number one thing you must remember when working with finances is that all funds that come into CAP are CAP funds. The money donated to your wing is for your wing's use. Donations that come with written instructions (restricted donations) must be used for the specific purpose indicated by the donor. However, funds must be handled per CAP rules because finance issues reflect poorly on the organization at all levels. We need to be good stewards of the resources we have.   CAP gets funds from several sources including dues, donations, state funds, and appropriated funds. These sources provide us with the funds we need to complete our missions, and the sources expect us to spend the money they give us in a responsible and accountable manner. CAP developed a program called Wing Banker to manage finances efficiently and effectively at all levels of CAP.

The Wing Banker program is designed so that there is one bank account for all funds within each wing, including each subordinate unit. Local units do not have their own bank accounts, but unit funds are managed by the wing in the Wing Banker account, which is a separate account from the wing's general checking account. The wing sets up sub-accounts in Wing Banker for each unit and monitors each unit's part of the consolidated account.   This removes the accountability requirement for each unit to report its financial status to higher headquarters because they already have the most information. Units may deposit income locally into the Wing Banker account and notify the wing finance officer and/or wing administrator when deposits are made. This allows the wing to credit the unit with the funds appropriately. If the unit needs funds, it lets the wing know what is needed and why. The wing then sends the funds to the unit. This process creates a system of checks and balances so no member can misappropriate CAP funds, and we can prove our good stewardship.

The wing's part of the checks and balances procedure is in double-checking deposits and check requests to ensure funds are properly approved by the unit. Should a unit request more than $500, the unit finance committee must approve the request and submit finance committee meeting minutes along with the request. The wing finance committee will review requests greater than $1500. The wing administrative is responsible for the day-to-day accounting of both the wing checking account and the Wing Banker Account. Working together with the wing's director of finance and the NHQ wing financial analysis, accounts are managed, reconciled, and reviewed in a timely manner. Unit commanders and finance officers are sent regular Wing Banker statements by the wing.

The unit's part of the checks and balances procedure is in double-checking their Wing Banker statement to ensure the unit sub-account is credited with   all deposits and that all expenses are appropriately recorded at the wing. Every unit assigns a Finance Committee to review the   unit's sub-account for any possible errors at least quarterly. The wing and units must have a Finance Committee appointed in writing within 30 days of a change of command. This is also done in eServices using the Committee Assignment module of the Duty Assignment module. The Finance Committee must be composed of at least three active senior members. Five or more   members should be assigned so that a quorum is more likely when absences occur. Wing commanders may not appoint immediate family or household members to the committee. Cadets are not allowed to serve on the Finance Committee. The commander serves as the chair of the committee.

Annually, CAP's funds are audited by an outside financial firm so we can prove to our constituents that we are good stewards of their funds. This audit requires us to provide several additional items beyond bank account records. The wing's accounts will be audited annually by the wing financial analyst with a report to the wing commander describing any discrepancies along with ways to strengthen procedures. Any findings in the audit will require the wing commander to respond with corrections. All unit commanders are required to report that all their funds are in the Wing Banker

program and that the unit is following all of CAP's financial regulations. This is done in the eServices Finance module using the Unit Commander's Declaration of Funds. It must be completed by 1 January of each year.

Civil Air Patrol has great resources for fundraising and development. Review these resources at https://www.gocivilairpatrol.com/fieldfr/devteam.

Key Publications:
CAPR 173-1 *Financial Procedures and Accounting*
CAPR 173-3 *Payment for Mission Support*
CAPR 173-4 *Fund Raising/Donations*

FINANCE WORKSHEET

1. Are all subordinate unit funds in the Wing Banker program?

2. Who are the members of the wing's Finance Committee? Did you assign them on the proper signature forms? Are they assigned in eServices?

   _____, Wing Commander, Chair
   _____, Wing Director of Finance
   _____
   _____
   _____

3. When was the last Finance Committee meeting? Ask to see Finance Committee minutes for the past 2 years.

4. When is the next Finance Committee meeting scheduled?

5. How much money does the wing current have in its accounts? Are there sufficient funds to cover an emergency (facility repairs at wing headquarters, etc.)? What restricted accounts does the wing maintain (scholarships, restricted donations)?

6. Are wing members spending money out of their own pockets for wing expenses? If so, why?

7. Where does our wing get the money it spends? What does our wing do for fundraising? What types of fundraising might you like to implement? Note: the wing commander must approve all fundraising in the wing. Consider seeking assistance from the NHQ development team.

8. Does the wing issue credit cards? Is there a written directive for their use? Review the wing's CAPF 172 to see who has credit cards and their limitations. Speak with your wing administrator or director of finance to learn if receipts are turned in on a timely basis.

9. What is your wing budget? How well is the wing adhering to its spending plan? Do you foresee any large expenditures in the next year or two? How will you pay for these expenses?

Budgets

The previous section mentioned budgets. What is the budget? Most people think of spending limits or other limitations when they think of a budget.   A household budget allows for only so much spending on food, travel, entertainment, bills, etc., and you are expected to stay within those limits. This helps an individual avoid spending more money than he or she has available. At the unit level,   CAP budgets are like personal budgets in some ways; but at the wing level budgets should be and are necessarily more complicated.

Look at your wing budget as a plan for how the wing will spend money and where the money will come from. Wings must have budgets. Large ticket items include wing conferences, encampments, orientation flights, SAREX and evaluations, travel, utilities, etc.   Many members complain about the expenses related to CAP membership. In some instances, these members are trying to pay the bills from their pockets. While there are some personal expenses involved, most of the costs of the wing   should be paid by the wing if the wing has the income to do so. Many situations can be solved by creating and working with a budget.

Creating a budget for CAP is not difficult. Work with your wing director of finance or your region DCS for finance. These resources can provide a sample budget you can use to build the wing budget; if not, check with your wing's financial analyst. First, ask yourself what does the wing want to do this year and what will it cost? Accurate cost estimates are helpful; however, you can still make a budget with the information you have. As planning for each activity progresses, update the budget. Over time, the numbers will become more accurate. Budgets are adjusted as needed. They are not static.

Once you create a list of the items and events, you need money to support and, depending on how much money is required, the next step is to plan for raising funds. How can the wing generate the necessary funds? If you plan suitable fundraising activities, the wing can raise the money. If not, the Finance Committee will need to take a good look at the budget and decide what the wing cannot afford. Finance committees conduct quarterly budget reviews to ensure the wing follows and adjusts its budget.   There is money available, but the wing will have to put forth a bit of energy to find it.

There are myriad different ways to raise money, but the wing must follow CAP regulations when fundraising. First, all units including the wing, must receive approval from the wing commander before committing to any fundraiser. While this may seem silly, the intent is to protect both the unit and CAP during the fundraising project. The wing commander will ask the legal   officer to review the plan to ensure that CAP will not end up owing money after the fundraiser. Many unscrupulous companies specialize in helping non-profit organizations raise money. These companies, however, are not "non-profit" themselves. If a commander does not follow CAP's regulations and ends up owing money to a fundraising organization, he or she could be held liable for paying that debt. Even the most straightforward fundraiser may have   some unexpected consequences. CAP provides you with free legal review. Use it!

Consider asking for assistance from NHQ's development office. Numerous resources are now available for finding ways to increase funding opportunities for wings and units.

Review the 173-series of CAP Regulations for more details on CAP finances.

A SIMPLE WING BUDGET

Complete the following budget by filling in the blanks with reasonable ideas and estimates. Answer the questions at the bottom of the page and adjust the budget, as necessary.

ACTIVITY/EXPENSE	ESTIMATED COST
Office Supplies	$100
Wing Conference	$7000
Postage	$50
SAR Training 1st Quarter	$3000
SAR Training 2nd Quarter	$3000
SAR Training 3rd Quarter	$3000
SAR Training 4th Quarter	$3000
Encampment	$15000
Total Expenses	

INCOME/FUNDRAISING/DONATIONS	ESTIMATED INCOME
Start of year funds on deposit in the Bank	$20000
Wreaths Across America	$1500
Donation from _____	_____
Donation from _____	_____
Fundraiser _____	_____
Fundraiser _____	_____
Total Income	

1. Is your expected income enough to pay for all your expenses?

2. Let's assume that your fundraising fell short by $3050. Can you still afford all your projected expenses? If not, what can you do to fix this issue?

Compliance and Culture

Compliance is a substantial responsibility of commanders. CAP commanders at all levels are responsible for ensuring members under their command comply with all publications released under their authority and with all higher headquarters' directive publications. Headquarters do what commanders' value and prioritize. A commander who makes meeting deadlines and expectations a priority, can create a culture of continual compliance. In a culture of continual compliance, members work ahead of deadlines and make meeting expectations a part of their routine. This is more effective than completing items on or near due dates and nagging members.

The culture of a wing impacts the ability of the wing to be successful. Commanders should ensure members are guided by the CAP core values of integrity, volunteer service, excellence, and respect. The core values are an ethical foundation.   In addition to this foundation, the commander is the example members of the unit follow. Lead by example. Show the   members of the wing what you value and expect in your bearing, how you wear the uniform, and how you treat others.   CAP's ethics policy, which is found in CAPR 1-1, *Ethics Policy*, will also guide your efforts. Welcome members for what   they contribute and value them. Do not discriminate and do not choose favorites. The climate you develop in the unit   will impact the growth of the unit. Commanders must ensure CAP's Nondiscrimination Policy is briefed annually to the   members. The CAP Nondiscrimination Policy is found in CAPR 36-1, *Civil Air Patrol Nondiscrimination Program*.

Commanders must develop a culture of risk management. It is impossible to take all the risk out of activities; however, we must ask ourselves two key questions. What can go wrong? How can we prevent it? Practicing risk management helps the wing be successful. The director of safety, as well as all members, help the commander implement risk management. If a mishap occurs, unit commanders ensure that wing reporting procedures are used and   comply with CAPR 62-2, *Mishap Reporting and Investigation*.   Mishaps are entered in eServices and investigated so we can learn from them and track trends we may need to address. The wing may need to issue a supplement with current contact information and reporting procedures.

Compliance is monitored at the unit level through Subordinate Unit Inspections (SUI), while wing compliance is monitored through Compliance Inspections (CI). Both include visits by a team of experts who will help the unit/wing by evaluating it in several key areas: the effectiveness of the unit is rated in a series of subject area tabs such as aerospace education, cadet programs, command, safety, etc. If the team finds discrepancies between unit practices and regulations, the items are noted in a report. Units must address all open discrepancies found in the Discrepancy Tracking System (DTS) in eServices before the due date, or the wing must shut down the unit. Likewise, wings face serious consequences if wing-level discrepancies are not addressed in a timely manner. The Inspection Knowledge Base tells units what must be accomplished to close a discrepancy. Ask the wing's inspector general to explain the SUI/CI process to you. Reviewing the wing's last CI results will tell you about the health of the wing and will help prepare for the next CI. You can learn more about SUI/CI in CAPR 20-1, *Inspector General Program* and CAPR 20-3 *Inspections*.
You can find the Inspection Knowledge Base at https://www.gocivilairpatrol.com/members/cap-national-hq/inspector-general/inspection-knowledge-base/ .

Commanders must ensure members wear uniforms correctly. Uniforms should be neat and clean. A member who does not meet the weight and grooming standards in CAPR 39-1, *CAP Uniform Manual,* must wear a CAP distinctive uniform rather than an Air Force-style uniform.   The director of personnel and the wing NCO can help you monitor uniform wear and ensure everyone   follows the rules. However, one of the best ways to encourage the proper wear of the uniform by your wing's members is to wear it properly yourself. Nothing sets the culture more than the leader modeling the behavior expected.

Reading the regulations carefully is time well spent. You can find our publications at https://www.gocivilairpatrol.com/members/publications. Start by reviewing CAPR 1-2 *Publications Management*. This regulation will help you learn how our other regulations are organized. Additionally, all approved wing or region supplements applicable to your wing are also found at

Duties and deadlines occur in many areas. As you read the regulations, note any tasks you must perform or deadlines you must meet. Failure to comply can bring consequences to the Wing such as Logistics Freeze, loss of vehicles, or to a member who may not get a well-deserved award or opportunity. A partial list of due dates (current as of November 2018) is available at the end of this guide.

COMPLIANCE QUESTIONS

1. When was the last CI for the wing? Obtain a copy of the CI. What were the wing's strengths and weaknesses?

2. Have all open discrepancies been closed in DTS (found in eServices)? If no, when must they be closed?

3. When is the next CI planned for the wing? What preparations have been made?

4. Who do I notify in case of a mishap or safety issue?

5. Are safety reports being closed out on time (60 days or less)?

6. When was the annual Nondiscrimination Policy briefing? Do we have proof that members received the information?

7. Review the most recent entries in the Safety Information and Reporting System (SIRS) system. Does the wing have a lot of mishaps? Are we asking ourselves what can go wrong and trying to prevent it in our activities?

8. Are members wearing uniforms properly and IAW regulations?

Logistics and Supply

CAPR 174-1, *Property Management and Accountability,* is your resource for Logistics questions and guidance. Logistics is another area where compliance and stewardship are crucial. Just like with funds, property issues can lead to trouble for members and commanders.

As a commander, you need to become familiar with ORMS (Operational Resource Management System) found in eServices. In ORMS, you can print reports, conduct and validate inventories, issue equipment, and upload vehicle utilization reports.

As a new commander, you need to accomplish several things:

1) Appoint a director of logistics (LG) on a CAPF 2A and in eServices. This requires the incoming officers to sign and validate that, "all CAP property, assets, and records for this duty assignment, in possession of the wing, are properly accounted for..."

2) Have the LG complete 100% eyes on inventory of wing property and equipment within the first 30 days (recommended) of assuming command.
    -During this 100% inventory, the logistics personnel need to ensure that all non-expendable property is marked with a CAP Property Tag (this is a compliance inspection item).
    - Review the wing headquarters property storage areas to ensure they are safe, secure, and protected from the elements (this is a compliance inspection item).

3) As the commander, ensure that all inventories have been completed in ORMS. Sometimes this is just a validation that the unit does not have any property in a category (aircraft, communications gear, supplies & equipment, real property, vehicle):
    - If you assume command between 1 October and 31 December, this is when units complete annual inventories in ORMS (this is a compliance inspection item).

4) As part of your logistics team, you may want to consider appointing a:
    - Communications officer to train and manage the wing's communications program as well as issue and track communications gear in ORMS.
    - Transportation officer, to ensure timely completion of monthly vehicle usage reports in ORMS, monitor condition and maintenance of the vehicle(s) and ensure that vehicle mishaps are reported following regulations. This person may review and approve driver's license applications.
    - Aircraft maintenance officer to manage your wing's fleet of CAP aircraft.

LOGISTICS AND SUPPLY WORKSHEET

1. Appoint a director of logistics on a CAPF 2A and in eServices.

2. Conduct a 100% eyes-on, hands-on change of command inventory. Note: You can print a report from eServices that will show you what items have been issued to members assigned to Wing Headquarters.

       Date: _____

3. Once you are appointed as commander ensure all inventories are complete:

Items	Complete	Date
Aircraft	Y/N	
Communications Gear	Y/N	
Supplies & Equipment	Y/N	
Real Property	Y/N	
Vehicles	Y/N	

4. Do you have a communications officer, transportation officer, and aircraft maintenance officer? Appoint with a CAPF 2A and in eServices.

Communications officer: Y/N   Appointed: _____
Transportation officer: Y/N   Appointed: _____
Aircraft Maintenance Officer: Y/N   Appointed: _____

Goals and Goal Setting

An organization without goals is like a train without a track. There is lots of effort, and the wheels are spinning, but no real forward motion occurs. A healthy wing has goals that indicate where the unit wants to be in the future. Have you ever seen a group of people without goals? In CAP, a wing without goals leaves subordinate units and individual members without a clue as to what is essential to the wing commander.

Goals can be easy to achieve or may challenge the entire organization. Each wing should have a good combination of easily achievable and challenging goals. The simple goals give the organization a feeling of accomplishment in the short term,   while the challenging goals tend to last longer and motivate members to expand their horizons. Long term goals can   give members a great sense of accomplishment.

There are many ways to develop goals, but everyone in the wing should have some input. Let everyone suggest a few ideas during brainstorming sessions. Take the entire list, review it, and prioritize the items to decide which ones the wing will set as goals. Set a reasonable number of goals. Too many goals can demoralize volunteers and spread efforts too thinly. Too few goals will fail to challenge and engage members.

What makes a good goal? A standard method used to check goals is the SMART test. SMART is an acronym that stands for specific, measurable, achievable, realistic, and timely. Evaluate each goal to ensure it meets these requirements, and the Wing will have a great list of goals.

Specific: Express the goal so that everyone understands it. Do not be vague.

Measurable: How will the wing know if it achieved a goal? Numerical goals are easy to measure, but they are not the only way a goal completion can be measured. Creating a situation can be measurable.

Achievable: Do not set goals that are impossible for the wing to accomplish. Do not plan a wing trip to the moon. That isn't going to happen. Don't sell yourself short, either. Put one or two big goals on the list to allow the wing to challenge itself. Realistic and achievable, go together.

Relevant: The goal the wing chooses needs to be relevant to at least one of CAP's missions, and it should be relevant to the members. Reasonable, relevant goals are something members want to do. Commanders can help motivate members to achieve goals.

Timely: Set goals that the wing has time to complete and that will still be applicable when the wing achieves them. If the wing sets a goal to raise funds to pay for cadets to attend an activity, it is important to set the deadline early enough to receive the funds in time to pay the activity fees.

MY WING'S GOALS

Develop five short-term, easy goals for your wing. For instance, "Each unit will recruit one new cadet and one new senior member within the next month." Read the National Strategic Plan and incorporate it into your goals also. Use the SMART test to evaluate the goals you set.

1. _____

_____

2. _____

_____

3. _____

_____

4. _____

_____

5. _____

_____

Develop one long term or significant goal that you would like to see the wing accomplish. For instance, "Take a wing trip to the USAF Museum next summer." Use the SMART test to evaluate the goal. Remember, engaged members return to CAP each week!

_____

_____

What are at least 2 of the goals that the next higher echelon commander expects the wing to accomplish? Use the SMART test to evaluate the goals. Modify the goals, if needed.

_____

_____

_____

_____

Planning

Now that the wing has goals, we need to figure out how we are going to accomplish the goals. Planning helps the wing go from goals to accomplishments. Taking the time to plan will make things run smoothly and give Wing activities a professional appearance. Subordinate commanders, members, and prospective members can see the difference between carefully planned meetings/events and improperly planned meetings/activities. Members stop attending when planning is ignored.

How do we plan? We need to know where we are, where we are going, and what it takes to get from point A to point B. Many people start with the goal first and plan backward. This process is called *backward planning* and involves determining what needs to be done before the goal is accomplished. There may be diversions and obstacles that will appear while you are completing this process. You will need to determine a way to minimize the effect the obstacles have on accomplishing the goal. Once you have worked your way through the process, you can create a schedule from the present.

Tasks do not always need to be accomplished in sequential order. Often, several different tasks can be completed at the same time.   If we are planning a cookout this weekend, some duties we need to accomplish include buying the food, preparing the grill, cooking the food, chilling the drinks, and serving the food. While we cannot cook the food until we have bought it and prepared the grill, we can chill the drinks at the same time as we prepare the grill and cook the food. Parallel processing is beneficial in reducing the time required to reach a goal but may need additional human resources to complete multiple tasks at the same time.

Scheduling is the process of assigning dates and times to events. Events can be a full activity or a planning milestone. Milestones are points in time when smaller parts of a project are completed, and they assist people with determining progress toward completion of a goal. Events need to be scheduled to avoid conflicts. Many people think that scheduling is planning. Scheduling, however, is only one essential part of planning. Once you have determined dates that your goal should be completed, get it on the schedule as soon as you can so other events may be deconflicted early. Everyone will need time to adjust their schedules, tasks, etc. Remember that cadet activities must be scheduled and posted to wing/unit web-based calendars at least two weeks prior to the event.

Putting an event on the calendar is only part of planning. What else is there? Resources such as facilities, financing, staffing, food, water, and lodging need to be procured. These things are all part of planning. What needs to be done before the event occurs? Is it an overnight event? If so, where is everyone going to sleep? How much is this going to cost and where is the funding coming from? Who is doing what and when during preparation, execution, and demobilization? Will you need CAP vehicles or aircraft? Are there contracts to be signed? Allow time for NHQ to sign all contracts (remember that no member, including a wing commander, can sign contracts or obligate the corporation). The more detailed the plan, the better the event will go.

As has been paraphrased from the poet Robert Burns "The best-laid plans of mice and men often go awry."   No plan is going to be perfect. Design your project in such a way that you have backups for essential tasks, and so the plan can be adjusted during execution. This allows the people executing the plan to avoid obstacles by making small changes to the plan. This will give the event the best chance to succeed.

After Action Report: Be sure to add one final step to your planning process. After the event, be sure evaluate your activity, the planning, the results. Essentially, consider what went right and what went wrong, what could be improved? Write these lessons learned down and file for the next event.

What kinds of plans should you be formulating in your wing?

As you look at your wing goals and activities, the larger events will be clear such as the annual cadet encampment or annual wing conference. Assigning project officers and teams to work these events is vital – you cannot do this by yourself as wing commander. Each event should develop their plans based on the wing commander's vision. It is up to you to share your vision with the team.

Some planning is required by wings:

ES Training Plan: this annual plan established how the wing will conduct ES training events for the upcoming fiscal year, helping NHQ allocate funds for the wing plan. The plan is recorded in eServices and approved by region and NHQ.

AE Plan of Action: Units and wings are required to develop an AE Plan of Action for the upcoming fiscal year. This is recorded and approved in the AE section of eServices.

Public Affairs Plan: Units and wings are required to develop a plan for public affairs activities on a calendar year basis. These plans are due by the end of March and are uploaded to eServices and evaluated by NHQ. This is a CI evaluated item.

PA Crisis Communications Plan: Similar to the PA Plan, the Crisis Communications Plan is required annually. This plan explains how the wing will respond to a non-ES crisis where the media may be involved and could result in negative publicity for CAP (such as death of a member, sexual abuse, etc.). These plans are due by the end of March and are uploaded to eServices and evaluated by NHQ. This is a CI evaluated item.

A final word about planning: The members of your wing and your wing staff are incredible volunteers who give much to the organization. But they also have non-CAP lives that include jobs, family, hobbies, and other responsibilities. As you plan your wing events, be sure to consider allowing down-time or specific weekends that are off-limits to CAP events (such as Mother's Day weekend or other holidays). We need to avoid member burnout and not put our members in a place of conflict when deciding to participate in CAP or family.

PLANNING EXERCISE

Complete the following annual planning calendar by filling in events that the wing will participate in that are not already planned by other units, including region. For this exercise, you need to find time for wing-wide orientation flight days, ES training, and a wing conference.

(Sample) Annual Planning Calendar

	Region	**Wing**	**Group/Other**
January			
February	Cadet Competition		Winter Bivouac
March		SAREX	
April	Region Conference		AE Weekend
May			
June			
July		Encampment	
August			Summer Bivouac
September		SAREX	
October			Model Rocketry
November			
December			

1. What do you need to consider to ensure the wing conference is a success?

2. What is your projected timeline for encampment planning? What milestones will you set to assist in determining if everything is on track?

3. What other events do you need to consider when planning your wing calendar? Holidays? Major local events? CAP national conference and Command Council activities?

4. Now that you have worked a sample plan, look at your wing's calendar and develop a year-long plan based on your wing's events. Who on your staff do you need to coordinate these events with before finalizing?

5. What is your personal plan for you   and your vice commander to attend wing-level activities?   Be sure to consider that you will be asked to attend squadron and group events (award presentations, dining-outs) as well as conferences hosted by other wings and regions?

eServices

eServices is CAP's resources database and it is used to process most of the personnel actions for members. Promotions, awards, training, training records, duty and committee assignments, transfers, and more are managed in eServices. eServices also contains the logistics part of the database, ORMS, where all accountable resources are tracked, assigned, and inventoried. The IG tracking system, called the Discrepancy Tracking System or DTS, is also located in eServices.

There are several tools to help you get a picture of the health of your units such as the Commander's Dashboard and Member Reports. Good leaders made decisions based on data. The data commanders need comes from eServices.

You should look at the **Commander's Dashboard** on the first of each month. Track key information that pertains to the expectations of your region commander and your goals on a spreadsheet. Update the data monthly. Begin to identify trends in your data and use it to improve your unit, plan needed activities, plan training, etc.

As a commander, you need to be able to operate in eServices to get almost anything done. Like all new systems, eServices may seem daunting at first. The more you use the system, the more you will see how easy tasks are to accomplish in eServices. Most of the approvals needed by your members will come through eServices. You may or may not receive an automated email informing you of the pending approval. In recognition of the value placed on your members, wing commanders should get in the habit of checking eServices on a regular basis (daily for the larger wings with more actions) to keep these actions from building up and to provide fast customer service to members. This keeps motivation high and encourages retention as members feel valued.

As you review the dashboard for your wing, fill in the following chart: Strengths and weaknesses are internal. Opportunities and threats are external. Make this chart and evaluation a regular part of your ongoing review and continuous compliance procedures.

Strengths	Weaknesses
Opportunities	Threats

The following guide will help you with a few of the most common eServices tasks used by commanders. Some are used weekly and others yearly. This guide should help you begin to find your way around the system. If you are unable to find what you are looking for, don't let it frustrate you. Call your mentor or another wing commander for assistance.

HOW DO I . . . IN eSERVICES?

Task	Location in eServices
Sign up for AEX (wing headquarters)	Aerospace Education, AEX, Apply for AEX
Recommend a member for an award	Personnel, Award Recommendation, Enter Member Information
Print a Certificate of Appreciation	Administration, CAP Certificates, Print Certificates, Cert of Appreciation
Complete the Cadet Protection Training	Online Learning, Learning Management System, Courses, Filter by Functional Area, Cadet Programs, Choose Course
Apply for a STEM kit	Aerospace Education, CAP STEM Kit, Application
Input a cadet's CPFT information	Cadet Programs, Cadet Promotions, Data Entry, Scroll Down to Physical Fitness Test, enter information, Submit
Promote an Active Senior Member	Personnel, Membership System, Promotion, Enter ID #, Select Grade, Review Criteria, Enter Justification, Submit
Evaluate my unit's membership stats	Log in to eServices, click the button in the top right of the Statistics box, Enter the Time Period, review membership trends
Assign a member to a duty position	Personnel, Duty Assignment, Assign Senior Duties, Choose Member, Choose Functional Area, Choose Duty Position, Enter Date, Choose Assignment Type, Submit
View wing's open items in DTS	Inspector General, Inspector General, Scroll Down and choose unit
Print a membership roster	Reports, Member Reports, Membership, Choose Unit, Choose Member Type, Choose file type, View Report, Print
View a member's personnel record	Administration, Member Search, Enter ID #, Member Search Report
Issue equipment to a member	Logistics, ORMS, Expendable Property, Enter ID #, Enter Information
View a member's ES training records	Operations, Operations Qualifications, 101 Card, Enter ID #
View a member's phone number	Administration, Member Search, Enter Last Name, Click Magnifying Glass, Choose name, Click Contacts
Approve a member's ID photo	Administration, Photo Admin, Validate CAP Photo

Report a member injury	Safety, SIRS, File New Mishap

Enroll/Update a member in a Specialty Track	Professional Development, Specialty Track, Specialty Track, Choose Member, Select Track, Choose Rating, Enter Date, Submit
Enter vehicle usage data	Logistics, ORMS, Vehicle Usage Entry, Enter Data, Upload F73, Submit
Transfer a member into your wing/unit	Personnel, Membership System, Transfer, Enter ID #, Choose Transfer To, Enter Transfer Date, Submit & Approve Transfer
Read a regulation	Administration; Forms, Publications, and Regulations
Review Unit Health/Metrics	Command, Commander's Dashboard
Submit a legacy program PD Award	Personnel, Membership System, PD Award Entry, Enter the ID # or name to search If the member comes up, they are grandfathered and you can enter info/request an award.
Submit an ET Award for the new program	Professional Development, Professional Levels, Professional Levels. Search for the name or ID #. If a member has a level ready to be submitted, a blue bar will appear with a submit button.
Approve an ET Award in the new program	Professional Development, Professional Levels. Look for a blue box above the Accomplishments module for awards or tasks pending approval.
Request an online cohort for online ET classes	Professional Development, Professional Levels, Cohort Request. If you have already requested a cohort or are in a cohort, it will not appear on your list.
Enter a task for a member in the new ET program.	Professional Development, Professional Levels, Professional Levels, Enter the ID # or name to search for the member. Choose the level. Scroll to a task marked by a yellow circle with an exclamation point, enter the information/upload a file, if needed. Submit at the bottom.
Review membership trend data.	Log in to eServices. Click the stylized X in the top right corner of the Statistics box.

Change of Command Ceremony

You might think that you do not need a ceremony to take charge of the wing. You might be right. The wing, however, does need a ceremony. The change of command ceremony exists to establish a smooth transition from one commander to the next. It is a time to celebrate the outgoing commander and thank them for the time and effort spent leading the wing. It is also a time to set the tone and provide the first impression of what you will be like as a commander. In all, it is a significant time for the wing. Remember, the change of command is not about you. It is for the members, and they deserve it.
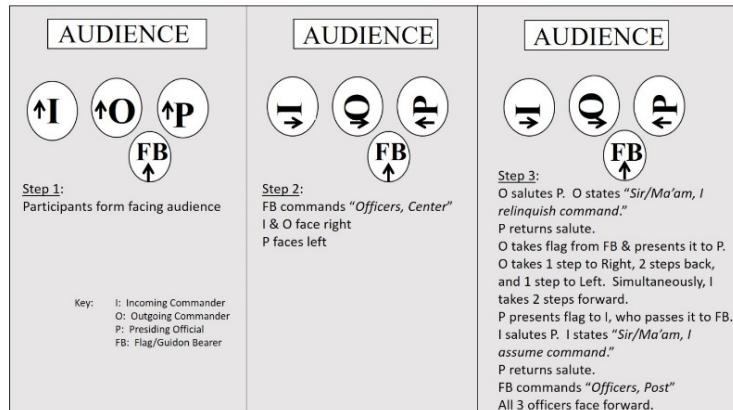
There are several methods outlined for a change of command ceremony within CAP publications. CAPP 3, *Guide to CAP Protocol*, Appendix 4A and 4B, list two sample agendas and descriptions of the change of command ceremony. The cadet drill test for *Learn to Lead*, Chapter 7, problem #2, also explains a change of command variation. The drill test is not a controlled item, so it may be referenced for that version of the ceremony.

Planning is required for the change of command ceremony to be executed with the level of professionalism that it deserves. Again, CAPP 3 should be used as the basis for planning. Ensure you have a good time and a place where everyone can attend. The next higher echelon commander should conduct the ceremony. The region commander should conduct the wing change of command ceremony; therefore he/she must be involved in the planning process. Make sure the time and place fit into his or her schedule. Send invitations to local dignitaries such as politicians, military leaders, the owners/managers of the meeting facility, etc. Consider inviting former wing commanders. Make the invitations formal to emphasize the importance of the event for your intended guests. Do not send the initial invite by email. You may follow-up on an invitation using email or a phone call, but the actual invitation should be sent by card or personal letter.

Often, a reception occurs after the ceremony. The incoming commander usually plans this as an opportunity for the members to talk with the new commander in a relatively informal environment. It may also be a celebration of thanks to the outgoing commander. In CAP, it is often both.

CAP changes of command are different from regular military changes of leadership. Usually, an ordinary military incoming commander is new to the unit and knows few, if any, of the unit members. The outgoing commander is usually being transferred to a new duty assignment, often at another installation. The change of command may be the last time the members of a military unit will see the outgoing commander and they may want to say their good-byes. In CAP, though, incoming commanders typically come from within the wing. Outgoing commanders either remain in the unit or move to a higher headquarters. Often the outgoing

commander will stay in the area and will still be seen by the members in the future or on a regular basis. This does not lessen the need for a change of command ceremony. The ceremony still clearly delineates who is in charge and when the change occurs. The graphic below shows a sample change of command. You can learn more in CAPP 3 *Guide to CAP Protocol* and CAPP 60-20 *Drill and Ceremonies*.

TAKING COMMAND/ THE CHANGE OF COMMAND QUESTIONS

1. When and where will the wing change of command ceremony be?

2. Who should be there? How will they be invited?

3. Who will be the event coordinator/project officer? (Note: as a new wing commander, you will be too busy to plan this event by yourself)

4. What will the uniform of the day be for participants? For members and guests?

5. Will I have a reception afterward? Who is planning that for me? Will we have refreshments? Who will pay for this expense?

6. Who will be participating in the actual ceremony? Who will handle the colors? Who will serve as flag bearer?

7. Will there be a promotion involved for either my predecessor or me? Do we have the promotion oath ready? Do we have the new grade insignia ready?

8. Which ceremony are we using? When will we get together to practice it?

9. Do we have all the required resources (flags, flag stands, etc.) for the ceremony?

10. What members of the press will you invite? Will the PAO take care of that?

11. Is a photographer available to document the event? Will the PAO take care of that?

12. What remarks will you make at the change of command? This is an opportunity to motivate your new command, thank them, and share your vision.

13. Will any awards be needed? Who will bring them?

14. Commanders cannot be appointed in eServices. Ask your director of personnel if the CAPF 27 has been completed and submitted to Region/NHQ.

Partial List of Due Dates/Suspenses

(Current as of August 2020)

Annually:
- Brief the Nondiscrimination Policy

Quarterly
- Review budget and note it in Finance Committee meeting minutes
- Finance Committee meeting
- Review all Wing Banker reconciliations using CAPF 173, upload into SmartVault NLT 45 days from close of quarter

Monthly
- Safety education
- Vehicle usage reports due in ORMS (by the 10th)
- Aircraft use reports due (by the 10th)
- Reconcile Wing Banker account
- Ensure members are current with their Cadet Protection Policy Training - Basic and/or Advanced certification (4-year refresh cycle began in 2019) (New senior members receive Cadet Protection Policy Training - Basic as part of their Level I Orientation)

1 January	New calendar year files start
10 January	Chaplain Corps Statistical Report due
15 January	AFA Outstanding CAP Cadet, AFSA NCO of the Year, of the year nominations due to wing
31 January	Annual Safety Surveys due
15 February	NCSA applications must be approved by the unit
15 February	Annual of the year award nominations due to region
15 March	Squadron of Merit Award selection
31 March	Public Affairs annual PA Plan and Crisis Communications Plan due via eServices PA app
31 March	Annual Safety Day must be completed
15 April	VFW Cadet NCO/Cadet Officer awards due
15 May	Balsem Award nominations due via eServices PA application
30 June	Annual wing history due to National Historian
10 July	Chaplain Corps Statistical report due
15 September	CAC representatives assigned in eServices
30 September	Review/approval of domain names
1 October	New fiscal year files begin, annual budgets must be uploaded into SmartVault
	Updated CAPF 172, *Consolidated Finance Authorizations*, signed/uploaded to SmartVault
15 October	AE Plan of Action and AE Activity Report due to wing,
	Winter NCSA applications due via eServices Cadet Programs app
1 November	Execute CAPF 171
15 November	AFA AE Cadet of the Year nomination due
31 December	Annual inventory due, CAP Scholarship applications due

CIVIL AIR PATROL
TRANSITION GUIDE:
A WORKBOOK FOR NEW WING COMMANDERS

Version Dated: 15 October 2020

To maintain academic integrity, CAP protects this material.

No portion of this guide may be used for any purpose other than for preparing for wing command.