COMPANION GUIDE TO ONLINE TRAINING

Use alongside the online lessons at fortunefavorsthepreprepared.com/ops-01-landing/

OPS-01: Formation & Governance
MAG Planning Series — Foundation Course
STUDENT COMPANION GUIDE

The Founding Governance Package — Reference Tables & Worksheets

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Condensed reference tables and blank worksheets for every OPS-01 lesson.
8 lessons · 7 worksheets · Guide Map · Glossary · Quick Reference Card

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Semper Paratus, Semper Gumby

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OPS-01: Formation & Governance — Student Companion Guide

Companion Guide to Online Training

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Support the development and availability of these courses by subscribing to my Patreon. This guide is not a standalone product. It is built to be used alongside the OPS-01 online lessons at fortunefavorstheprepared.com/ops-01-landing/ — it condenses and organizes what those lessons teach; it does not replace them.

ONLINE TRAINING ACCESS

The 8 OPS-01 lessons, all knowledge checks, and the course certificate are hosted online at fortunefavorstheprepared.com/ops-01-landing/. Progress is tracked per browser/device.

INSTRUCTOR-LED GROUP TRAINING

For a founding group working through OPS-01 together in person, assign one lesson per session, complete the matching worksheet as a group afterward, and bring the completed worksheets forward into the Lesson 08 capstone assembly.

How to Use This Companion Guide

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What This Guide Contains

Part I is a condensed reference table for each of the 8 lessons — key terms, tables, and structures, for quick lookup after you've completed the lesson online. It does not contain the full instructional content, the knowledge-check questions, or their answers.

Part II is a set of blank, fillable worksheets — one per lesson from 02 through 08 — that your founding group fills in as you work through the course, building toward the Lesson 08 capstone.

Part III is an appendix: a glossary, a one-page quick reference card, the doctrinal sources this course draws on, and any open items still unresolved at the time of this edition.

Required workflow — order matters: 1. Complete a lesson online. 2. Pass its knowledge check. 3. Use this guide's matching Part I reference and Part II worksheet to record your group's actual decisions. 4. Move to the next lesson.

Not standalone: This guide will not teach OPS-01 on its own. Reference tables assume the source lesson has already been completed; worksheets assume you already understand the concept they're recording.

Guide Map — What to Reference When

When You Need…	Turn To…
The three governance failure patterns	Part I — Reference for Lesson 01
A worked purpose statement example	Part I — Reference for Lesson 02; WS-01
To compare legal structures quickly	Part I — Reference for Lesson 03; WS-02
The role/authority table template	WS-03
The decision-tiering table	Part I — Reference for Lesson 05; WS-04
The SOP house format fields	Part I — Reference for Lesson 06; WS-05
The code of conduct principles, condensed	Part I — Reference for Lesson 07
The final capstone assembly checklist	WS-07
A term you don't recognize	Part III — Glossary
A single-page summary for a meeting	Part III — Quick Reference Card

PART I — QUICK REFERENCE

Reference for Lesson 1: Why Groups Fail Before They Start

The Three Failure Patterns

Pattern	One-Line Definition
Authority Vacuum	No one is named to decide, so a time-sensitive decision doesn't get made.
Unbounded Membership	No criteria, no process, no removal path — the group can't undo a bad addition.
Undocumented Decisions	Decisions live in memory, not on paper, and get re-litigated endlessly.

Reference for Lesson 2: Purpose, Scope & Founding Criteria

Purpose Statement Structure

Sentence 1: what the group does. Sentence 2: what it explicitly does not do. Keep the whole statement under 100 words.

Founding Criteria — Where to Look / What to Look For

Where to Look	What to Look For
CERT classes	Consistency over enthusiasm
Amateur radio clubs	Willingness to train and keep learning
Faith/service community groups	Calm decision-making under stress
Volunteer disaster response orgs	Respect for privacy and boundaries

Coverage Domains (Aim for Coverage, Not Perfection)

Food Systems · Medical & Dental · Power & Mechanical · Construction & Repair · Communications · Intelligence & Planning · Security

Reference for Lesson 3: Legal Structure & Formalization

Structure	Filing Burden	Fits Best When
Unincorporated Association	None (default)	Small, closed-membership group, minimal shared assets
LLC	Moderate	Group holds shared property, equipment, or a cache location
Nonprofit	Highest	Group runs public-facing programs or accepts donations

Mutual Aid Agreement Must Cover

Member contributions and expectations · shared-resource use rules · what happens to shared property if a member leaves · the amendment process.

Reference for Lesson 4: Role Structure & Authority

Role	Authority
Group Lead	Final call outside existing decision tiers; represents the group externally
Deputy / Second	Assumes Group Lead authority automatically under devolution
Intelligence Lead	Threat assessment and situational awareness
Communications Lead	PACE plan, net procedures, message discipline
Medical Lead	Medical readiness and training
Security Lead	Defensive planning and access control
Planning/Logistics Lead	Resource tracking and SOP maintenance
Navigation Lead	Route planning and land navigation training

Devolution of Authority

A named backup's authority activates automatically per a pre-agreed rule — no new vote required in the moment.

Reference for Lesson 5: Decision-Making Frameworks

Model	Failure Mode
Consensus	A single holdout can block the group indefinitely
Majority Vote	A bare majority can repeatedly overrule the same minority
Command Authority	Unchecked authority with no in-the-moment correction

Decision Tiering

Decision Type	Suggested Model
Routine	Command authority (pillar lead)
Resource	Majority vote
Membership	Consensus or high-threshold vote
Emergency	Pre-delegated command authority

Reference for Lesson 6: SOP Development

Document	Job
Charter	States governance: purpose, roles, authority, decision tiers
SOP	States a repeatable procedure for a specific situation
Field Card	Pocket-sized excerpt of an SOP for use in the moment

SOP House Format

Trigger → Roles → Steps → Escalation → Review Date.

Pre-Activation Priority List

Communications/PACE activation · Muster/notification · Resource access · Decision escalation.

Reference for Lesson 7: Membership Governance & Conflict Resolution

Onboarding Phases

1. Initial contact & alignment. 2. Code-of-conduct acknowledgment. 3. Observed participation. 4. Capability verification. 5. Gradual access.

Code of Conduct — Seven Principles (Condensed)

Character before capability · Safety, discipline & responsibility · Commitment to learning · Operational discretion · Team over ego · Accountability & trust building · Community-first mindset.

Graduated Discipline

Informal correction → formal warning → suspension → removal.

Reference for Lesson 8: Capstone: The Founding Governance Package

Component	Source Lesson
Purpose & Scope Statement	Lesson 02
Legal Structure Decision & Mutual Aid Agreement	Lesson 03
Role & Succession Chart	Lesson 04
Decision-Tier Charter	Lesson 05
Pre-Activation SOP Set	Lesson 06
Code of Conduct & Removal Process	Lesson 07

PART II — WORKSHEETS

WS-01: Purpose & Scope Statement Builder

For use after Lesson 02.

Draft your group's purpose statement in two sentences: what the group does, and what it explicitly does not do.

Element	Your Group's Draft
What the group does:	
What the group does not do:	
Founding member criteria:	
Founding group size / roster:	

WS-02: Legal Structure Decision Worksheet

For use after Lesson 03.

Record your group's legal structure decision and the key terms of your mutual aid agreement. This is not legal advice — confirm with an attorney before adoption.

Element	Your Group's Decision
Chosen structure:	
Reason for this choice:	
Shared resources covered:	
What happens if a member leaves:	
Amendment process:	

WS-03: Role & Succession Chart

For use after Lesson 04.

List every role your group is using, its authority, and its named backup under devolution.

Role	Held By	Named Backup

WS-04: Decision-Tier Assignment Worksheet

For use after Lesson 05.

Assign a decision-making model to each category of decision your group expects to face.

Decision Category	Model Assigned	Who Decides

WS-05: SOP Drafting Template (House Format)

For use after Lesson 06.

Draft one SOP using the house format. Copy this page for each additional SOP.

Field	Content
Trigger:	
Roles:	
Steps:	
Escalation:	
Review Date / Owner:	

WS-06: Code of Conduct & Removal Process Builder

For use after Lesson 07.

Record your group's adopted code of conduct reference and the specifics of your removal process.

Element	Your Group's Decision
Code of conduct adopted (y/n, version):	
Who can initiate removal:	
Who decides (per WS-04 tier):	
Documentation required:	
Appeal process, if any:	

WS-07: Founding Governance Package Assembly Checklist

For use after Lesson 08.

Confirm each component is complete, owned, and consistent with the others before your group votes to adopt the package.

Component	Complete?	Owner	Reviewed Against Other Components?

Glossary

Term	Definition
MAG	Mutual Assistance Group — a governed, trusted network preparing and training together.
Authority Vacuum	No one named to decide, so a time-sensitive decision doesn't get made.
Devolution of Authority	Pre-agreed automatic transfer of decision authority to a named backup.
Decision Tier	The decision model (consensus/vote/command) assigned to a category of decision.
PACE Plan	Primary, Alternate, Contingency, Emergency — layered redundancy planning.
SOP	Standard Operating Procedure — a repeatable, written procedure for a specific situation.
Field Card	A pocket-sized excerpt of an SOP for use in the moment.
Compartmentalization	Limiting which members hold which sensitive information.
Probationary Period	A defined period before full membership, with limited access and voting rights.
Founding Governance Package	The six adopted documents produced across Lessons 02–07, assembled in Lesson 08.

Quick Reference Card

Print this page and keep it with your group's founding documents.

Decision Category	Model
Routine	Command authority (pillar lead)
Resource	Majority vote
Membership	Consensus or high-threshold vote
Emergency	Pre-delegated command authority

Pre-activation SOP priority: Communications/PACE · Muster/notification · Resource access · Decision escalation.

Doctrinal Sources

Source	Publisher	Relevance
FM 6-22	Dept. of the Army (2015 ed.)	Leadership doctrine underlying the role/succession framework
Robert's Rules of Order	Newly Revised (12th ed.)	Simplified parliamentary procedure adapted for MAG decision-tiering
National Continuity Policy (FCD 1)	Federal continuity doctrine	Source of the devolution-of-authority model
FEMA NIMS Doctrine	Dept. of Homeland Security	Cross-referenced from OPS-03 for incident-command authority