POSITION TASK BOOK FOR THE POSITION OF

Type 3
ALL-HAZARDS
PLANNING SECTION CHIEF
(PSC3-AH)

Version: January 2015

**"This position task book is for a direct entry position and includes tasks of the
Planning Section Unit Leader positions."**
**"An individual who is qualified in one or more of these subordinate positions can be recorded as
having completed the associated task(s) in this position task book."**

POSITION TASK BOOK ASSIGNED TO
INDIVIDUAL'S NAME:
DUTY STATION:
PHONE NUMBER:
EMAIL:
POSITION TASK BOOK INITIATED BY
OFFICIAL'S NAME:
TITLE:
POSITION
DUTY STATION:
PHONE NUMBER:
EMAIL:
POSITION TASK BOOK INITATED AT
LOCATION:
DATE:

EVALUATOR

DO <u>NOT</u> COMPLETE THIS UNLESS YOU ARE RECOMMENDING THE TRAINEE FOR CERTIFICATION

VERIFICATION/CERTIFICATION OF COMPLETED POSITION TASK BOOK FOR THE POSITION OF

ALL HAZARDS PLANNING SECTION CHIEF TYPE 3

FINAL EVALUATOR'S VERIFICATION

I verify all tasks have been performed and are documented with appropriate initials.

I also verify _____
has performed as a trainee and should therefore be considered for certification in this position.

FINAL EVALUATOR'S SIGNATURE:
DATE:
EVALUATOR'S PRINTED NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:

CERTIFYING OFFICIAL FOR CERTIFICATION

I certify _____
has met all requirements for qualification in this position and is certified for the position.

OFFICIAL'S SIGNATURE:
DATE:
OFFICIAL'S PRINTED NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:

NATIONAL INCIDENT MANAGEMENT SYSTEM (NIMS)
INCIDENT COMMAND SYSTEM (ICS)
POSITION TASK BOOKS (PTBs)

Position Task Books (PTBs) are designed to be used by any individual (trainee) interested in becoming certified under the National Incident Management System (NIMS). The PTB's are intended to be used to document experiences that indicate successful completion of tasks specific to an Incident Command System (ICS) position. The performance requirements for each position are associated with core ICS competencies, behaviors and tasks as suggested to the Federal Emergency Management Agency (FEMA) by a multi-disciplined, highly-experienced expert panel.

Trainees are evaluated during this process by qualified evaluators, and the trainee's performance is documented in the PTB for each task by the evaluator's initials and date of completion. An Evaluation Record will be completed by all evaluators documenting the trainee's progress after each evaluation opportunity.

Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation to the "authority having jurisdiction" (of the trainee), that the trainee be certified in that position. Evaluation and confirmation of the trainee's performance while completing all tasks will normally require more than one training assignment and several different evaluators. Incidents lasting several days may involve multiple evaluators. Tasks may be evaluated on incidents, in a classroom simulation, in training and HSEEP compliant functional or full scale exercises and in other work situations as long as there is a qualified evaluator.

It is important performances be critically evaluated and accurately recorded by each evaluator. All tasks must be evaluated.

The Interstate Incident Management Team Qualifications System [IIMTQS] Guide lists the definitions for trainee, evaluator, training officer and authority having jurisdiction.

Responsibilities:

1. **Authority having jurisdiction (AHJ)**:
   • Select trainees based on the needs of their organization or to fulfill their obligations to contribute to Incident Management Teams or other Mutual Aid agreements.
   • Provide opportunities for evaluation and/or making the trainee available for evaluation.
2. The **Individual/ Trainee:**
   • Reviewing and understanding instructions in the PTB.
   • Identifying desired objectives/goals whenever an opportunity for evaluation is recognized.
   • Providing background information to an evaluator.
   • Assuring the evaluation record is complete.
   • Completing all tasks for an assigned position within the timeframe allowed for that position. All tasks with an approval older than the allowed timeframe must be reevaluated.
   • Notifying the local AHJ /training officer when the PTB is completed, and obtaining a signature recommending certification.
   • Retaining the original PTB and provide a copy of the PTB to the appropriate individual/department to obtain a qualification from your agency.
3. **Evaluator(s)**:
   • Being qualified and proficient in the evaluated position.
   • Meeting with the trainee and determining past experience, current qualifications and desired objectives/goals.
   • Reviewing tasks with the trainee.
   • Explaining to the trainee the evaluation procedures that will be utilized and which tasks may be performed during the evaluation period.
   • Accurately evaluating and recording demonstrated performance of tasks. Dating and initialing completion of the task to indicate satisfactory performance. Unsatisfactory performance should also be documented.
   • Completing the Evaluation Form found at the end of each PTB.
   • Completing an Incident Personnel Performance Rating (ICS 225) form.
4. The **Final Evaluator:**
   • Being qualified and proficient in the position being evaluated.
   • Reviewing the trainee's record to ensure completeness.
   • Signing the verification statement on page 2 of the PTB when all tasks have been initialed.
   • Ensuring all tasks have been completed within the three years prior to submission for final approval. Any task with an approval older than three years must be reevaluated and brought up to date.
5. **Training Officer:**
   • Providing the correct version of the PTB to the individual in order to document performance.
   • Explaining to the trainee the purpose and processes of the PTB as well as the trainee's responsibilities.
   • Tracking progress of the trainee.
   • Identifying incidents or situations where the trainee may have evaluation opportunities.
   • Identifying and assigning an evaluator who can provide a positive experience for the trainee, when the evaluation opportunity is within the AHJ's jurisdiction.
   • Receiving and filing documentation from the assignment.
6. **AHJ Designee**
   • Issuing the PTB to document task performance.
   • Explaining to the trainee the purpose and processes of the PTB as well as the trainee's responsibilities.
   • Tracking progress of the trainee.
   • Identifying incident evaluation opportunities.
   • Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance.
   • Documenting the assignment.
   • Conducting progress reviews.
   • Conducting a closeout interview with the trainee and evaluator and assuring documentation is proper and complete.

Competencies, Behaviors and Tasks:

Each Position Task Book lists the performance requirements (tasks) for specific positions set by the ICS competencies and behaviors (September 2007) recognized by FEMA's National Integration Center and posted to the NIMS Resource Center Web site, http://www.fema.gov/emergency/nims/.

There are numerous bullet statements listed under each task. The bullet statements are listed as guidelines/examples for the evaluator to follow to insure that the intent of the task has been completed. Not all bullet statements for a task are required to be completed if the overall intent of the task has been satisfied.

Each task has a code associated with the type of training assignment where the task may be completed. **Definitions for these codes are below**. While tasks can be performed in any situation, they must be evaluated on the specific type of incident/event for which they are coded.

Tasks coded I must be evaluated on an incident/event, and so on. Performance of any task on other than the designated assignment is not valid for qualification.

If more than one code is listed, the task may be completed on any of the listed situations (e.g. If code I, O1 and O2 are listed, the task may be completed on any of the three listed). The evaluator should circle the evaluation code the task was evaluated at.

O1 = Task can be performed on a Planned Event, HSEEP compliant or Full Scale Exercise with equipment deployment which is managed under the Incident Command System (ICS). Examples of exercises that may employ ICS include oil spill, search and rescue, hazardous material response, and fire.

O2 = Task can be performed on an Exercise which is managed under the Incident Command System (ICS). Examples of exercises that may employ ICS include oil spill, search and rescue, hazardous material response, and fire.

O3 = Training or Daily Job environment that tests knowledge/skills associated with the task.

O4 = Task can be performed during an ICS course classroom environment that tests knowledge/skills associated with the task.

I = Task must be performed on an incident, which is managed under the Incident Command System (ICS). Examples of incidents that may employ ICS include oil spill, search and rescue, hazardous material response, fire, or law enforcement incidents that may be emergency or non-emergency in nature.

R = Rare events seldom occur and opportunities to evaluate Trainee performance in real settings are limited. Examples of rare events include accidents, injuries, vehicle and aircraft crashes. Through interviews, the evaluator may be able to determine if the trainee could perform the task in a real situation

Competency: Assume position responsibilities

Description: Successfully assume role of Planning Section Chief and initiate position activities at the appropriate time according to the following behaviors.

Behavior*: Ensure readiness for assignment.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Obtain and assemble information and materials needed for kit. Kit assembled and prepared prior to receiving an assignment. Kit contains critical items needed for the assignment and items needed for functioning during the assignment. Kit is easily transportable. The basic information and materials needed <u>may</u> include, but is not limited to, any of the following: **Reference Material** • References appropriate for the incident type and agencies involved. • Agency specific policies and procedures. • Emergency Responder Field Operations Guide (ERFOG). • Position manuals for the section. • IMT contact information. **Forms may include, but are not limited to:** (PSC should ensure availability of forms for appropriate positions): • ICS 201, Incident Briefing • ICS 202, Incident Objectives • ICS 203, Organization Assignment List • ICS 204, Assignement List • ICS 205, Incident Radio Communications Plan • ICS 205A, Communications List • ICS 206, Medical Plan • ICS 207, Incident Organization Chart • ICS 208, Safety Message / Plan • ICS 209, Incident Status Summary • ICS 210, Resource Status Change • ICS 211, Incident Check-In List • ICS 213, General Message • ICS 214, Activity Log • ICS 215 & WS Operational Planning Worksheet • ICS 215A, & WS Incident Action Plan Safety Analysis • ICS 219-1 through 219-8, Resource Status Cards • ICS 220, Air Operations Summary Worksheet • ICS 221 Demobilization Checkout • ICS 225, Incident Personnel Performance Rating • Agency specific forms appropriate to the function **Supplies** • Office supplies appropriate to the function • Maps	I O1 O2 O3 O4		
2. Arrive properly equipped at incident assigned location within acceptable time limits.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
	O2		
3. Check in according to receiving agency/organization guidelines.	I O1 O2		

Behavior: Ensure availability, qualifications and capabilities of resources to complete assignment.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
4. Identify Units within the Section to be activated and resources required for Section operations.	I O1 O2		
5. Utilize technical specialists, operations personnel and local agency(s) personnel.	I O1		

Behavior: Gather, update and apply situational information relevant to the assignment.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
6. Obtain complete information from dispatch upon activation. • Incident name. • Incident order number. • Request number. • Reporting location. • Reporting time. • Transportation arrangements/travel routes. • Contact procedures during travel (telephone/radio).	I O1 O2 O3 O4		
7. Gather information necessary to assess incident assignment and determine immediate needs and actions. • Incident Commander's name and agency/organization contact information. • Type of incident. • Current resource commitments. • Current situation. • Expected duration of assignment. • Topography. • Weather. • Agency Administrator's briefing/other briefing requirements (as appropriate).	I O1 O2		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
8. Obtain briefing from Agency Administrator/ outgoing Incident Commander and gather information. • Ensure briefings from applicable outgoing personnel are complete and include, as a minimum description: Incident Objectives, ICS 201 (Incident Briefing), organizational structure (area command or single organization), special considerations on the incident and the current regional situation. • Obtain anticipated incident duration, size and type. • Complete the appropriate checklist for takeover of incidents.	I O1		
9. Collect information from outgoing Planning Section Chief, initial Incident Commander or other personnel responsible for incident prior to your arrival. • Obtain status of incident and assigned resources. • Obtain status of existing Planning Section. • Obtain information on location situations; e.g., ICP/base locations, medical facilities, road closures, camp locations, etc. • Obtain a copy of "Delegation of Authority".	I O1		

Behavior: Establish effective relationships with relevant personnel.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
10. Establish and maintain positive interpersonal and interagency working relationships. • Local agencies. • Hosting unit. • Public. • Division/Group Supervisors. • Command and General Staff.	I O1		
11. Create a work environment that provides mutual respect and equal opportunity for all personnel assigned to the incident.	I O1		

Behavior: Establish organization structure, reporting procedures and chain of command of assigned resources.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
12. Organize assigned resources into configurations that meet incident/tactical objectives. • Identify workspace requirements and determine location. • Brief unit leaders, including summary of incident, current activity and anticipated section activity for individual unit planning. • Provide initial operating instructions to section personnel, including health, safety, security concerns and expectations.	I O1 O2		

Behavior: Understand and comply with ICS concepts and principles.

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
13. Maintain appropriate span of control.	I O1		
14. Demonstrate knowledge of ICS structure, principles, positions and ICS forms.	I O1 O2		
15. Understand scope, roles, responsibilities, jurisdiction and authority of responder agencies.	I O1		
16. Assure execution of appropriate administrative requirements (to include documentation, ICS forms, personnel and equipment time records, performance ratings).	I O1 O2		

Competency: Lead assigned personnel

Description: Influence, guide and direct assigned personnel to accomplish objectives and desired outcomes in a rapidly changing, high-risk environment.

Behavior: Model leadership values and principles.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
17. Exhibit principles of duty. • Be proficient in your job, both technically and as a leader. • Make sound and timely decisions. • Ensure tasks are understood, supervised and accomplished. • Train and mentor assigned subordinates.	I O1 O2		
18. Exhibit principles of respect. • Know your subordinates and look out for their well-being. • Keep your subordinates informed. • Build the team. • Assign your subordinates in accordance with their capabilities.	I O1 O2		
19. Exhibit principles of integrity. • Know yourself and seek improvement. • Seek responsibility and accept responsibility for your actions. • Set the example.	I O1 O2		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

Behavior: Ensure the safety, welfare and accountability of assigned personnel.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
20. Identify potentially hazardous situations in your working area.	I O1		
21. Inform subordinates of hazards.	I O1		
22. Control positions and function of resources	I O1		
23. Ensure special precautions are taken when extraordinary hazards exist.	I O1		
24. Ensure adequate rest is provided to all unit personnel.	I O1		
25. Ensure rest, recuperation and release requirements of resources are tracked and preparations are made to meet them (including requirements by terms of employment).	I O1		

Behavior: Establish work assignments and performance expectations, monitor performance and provide feedback.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
26. Establish priorities and coordinate units within the section.	I O1 O2		
27. Perform the duties and skills of a Resources Unit Leader according to the most current version of the Emergency Responder Field Operations Guide (ERFOG). • Maintain status of all assigned resources (primary and support) at an incident. • Oversee check-in of all resources. • Maintain a status-keeping system indicating current location and status of all resources. • Maintain a master list of all resources (e.g., key supervisory personnel, primary and support resources, etc.).	I O1 O2		
28. Perform the duties and skills of a Situation Unit Leader according to the most current version of the Emergency Responder Field Operations Guide (ERFOG). • Ensure the collection, processing and organizing of all incident information. • As needed, prepare future projections of incident growth, maps and intelligence.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

29. Demonstrate the knowledge and abilities of a Documentation Unit Leader according to the most current version of the Emergency Responder Field Operations Guide (ERFOG). • Maintain accurate and up-to-date incident files. • Provide duplication services. • Ensure proper storage of incident files for legal, analytical and historical purposes.	I O1 O2		
30. Demonstrate the knowledge and abilities of a Demobilization Unit Leader according to the most current version of the Emergency Responder Field Operations Guide (ERFOG). • Develop the Incident Demobilization Plan.	I O1		
31. Communicate job performance requirements to subordinates.	I O1		
32. Continuously evaluate performance.	I O1		
33. Reinforce acceptable performance.	I O1		
34. Communicate deficiencies immediately and take corrective action.	I O1		
35. Identify training needs and provide opportunities for training.	I O1 O2		
36. Prepare and discuss performance ratings with subordinates	I O1		
37. Ensure necessary support staff is aware of planning meeting assignments. • Situation Unit Leader has accurate and current incident, regional and national situation status. • Resources Unit Leader has accurate and current status of resources on the incident as well as regionally and nationally. • Technical specialist input is presented. • Arrangements are made for documentation and recording of applicable information.	I O1		
38. Ensure Resources Unit Leader is planning tactics meeting and operational briefing assignment.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

Behavior: Emphasize teamwork.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
39. Establish cohesiveness among assigned resources. • Establish trust through open communication. • Require commitment. • Set expectations of accountability. • Bring focus to the team result.	I O1 O2		

Behavior: Coordinate interdependent activities.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
40. Interact and coordinate with all command and general staff.	I O1		
41. Coordinate incident rehabilitation needs. • Coordinate with responsible agencies. • Work with technical specialist(s) e.g., hazardous materials specialist, environmental specialists and keep updated on their activities.	I O1		

Competency: Communicate effectively

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high-risk environment

Behavior: Ensure relevant information is exchanged during briefings and debriefings.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
42. Attend Agency Administrator and/or outgoing Incident Commander briefing. • Provide the following: a completed analysis of the incident or support the development of an analysis, a written Delegation of Authority, a copy of the most recent ICS 209 (Incident Status Summary), map(s) of the incident, and a completed ICS 201 (Incident Briefing) and IAP (Incident Action Plan). • Complete the appropriate checklist for transition of large incidents. • Provide copies of current resource orders and those resources committed to incident. • Provide key contact list with phone and fax numbers.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

43. Obtain briefing from your Incident Commander. May be one-on-one or at an initial strategy meeting or other team meeting.
  • Receive Incident Commander's priorities, goals, and objectives for the incident management team.
  • Receive Incident Commander's priorities, goals and objectives for the incident.
  • Obtain initial instructions concerning the tasks expected of the planning section.
  • Receive expected timeframes for briefings, planning meetings and team meetings.
	I
	O1
	O2		

44. Collect information from the outgoing planning section chief, initial Incident Commander or other personnel with information relevant to your section.
  • Obtain status of incident and assigned resources.
  • Obtain status of existing planning section.
  • Evaluate and replace or order positions in planning section, as needed.
	I
	O1		

45. Ensure all briefings and meeting locations, are well organized and necessary materials are available.
  • Large ICS 215 (Operational Planning Worksheet) and ICS 215A (Incident Action Plan Safety Analysis).
  • Large scale schematic map of incident.
  • Flip charts.
  • Felt tip markers.
  • Planning meeting Agenda.
	I
	O1
	O2		

46. Identify who needs to attend operational briefings • Post in conspicuous locations time of briefings, location, and required attendees.	I O1 O2		
47. Facilitate the operational period briefing, particularly emphasizing any changes from the written IAP.	I O1		
48. Participate in after-incident review per agency/organization policy.	I O1		

Behavior: Ensure documentation is complete and disposition is appropriate.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
49. Ensure an incident summary e.g., ICS 209 (Incident Status Summary) is completed within established timeframes. • Review for accuracy and completeness, approve, sign and submit to appropriate office.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

50. Ensure all personnel and equipment time records are complete and have been submitted to the Finance Section Leader at the end of each operational period.	I O1 O2		
51. Submit to the documentation unit completed and legible ICS 214 (Unit Log) containing pertinent information for each operational period.	I O1 O2		
52. Ensure all required incident reports and narratives are completed to agreed upon standards prior to leaving incident.	I O1		
53. Properly assemble and file up-to-date incident records.	I O1		

Behavior: Gather, produce and distribute information as required by established guidelines and ensure understanding by recipient.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
54. Establish and maintain incident planning cycle. 　• Publish and post-planning cycle at appropriate locations. 　• Distribute cycle to Incident Commander, command and general staff, and other appropriate personnel. 　• Facilitate meeting and briefings during the planning cycle.	I O1		

Behavior: Communicate and ensure understanding of work expectations within the chain of command and across functional areas.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
55. Evaluate and share with incident management team members, all information for your section and what is anticipated for incident operations based on expected duration, size, type of incident, priorities and values to be protected (life, property, infrastructure, environment, etc.) and jurisdictional involvement.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

Behavior: Develop and implement plans and gain concurrence of affected agencies and/or the public.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
56. Ensure planning staff completes required elements of the Incident Action Plan (IAP) within required timeframes. • Obtain elements from other appropriate sections within established timeframes. • Assemble the elements into an IAP. • Ensure the IAP meets incident objectives and is congruent with approved strategic plan. • Develop contingency plan(s) as needed • Obtain the Incident Commander's approval and signature on IAP. • Identify how many copies of IAP are needed. • Ensure documentation unit makes and distributes appropriate copies of IAP to key people. • Provide accurate information to these individuals prior to the operational period briefing; e.g., air operations, ground support, food unit, supply unit and agency/organization dispatch.	I O1		
57. Ensure the agency's/organization's incident strategic plan is appropriate. • If it needs revision the Agency Administrator is responsible (may ask the Incident Commander to revise for the Agency Administrator's approval).	I O1		
58. Consider demobilization early enough during the incident so an adequate demobilization plan is in place prior to the actual need to release resources. • Ensure demobilization plan is complete and signed. • Develop in coordination with command and general staff and agency/organization dispatch. • Request all sections submit names or lists of surplus or potentially surplus personnel and resources to demobilization unit 48 hours in advance of them becoming surplus. • Schedule surplus resources and personnel for proper demobilization.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

Competency: Ensure completion of assigned actions to meet identified objectives

Description: Identify, analyze and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established timeframe.

Behavior: Administer and/or apply agency policy, contracts and agreements.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
59. Display, describe and utilize necessary agency/organization policy, legal and fiscal constraints and political considerations to be used in the planning meeting to review adequacy of strategic plans and in development of Incident Action Plan (IAP)	I O1 O2		

Behavior: Gather, analyze and validate information pertinent to the incident or event and make recommendations for setting priorities.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
60. Evaluate and monitor current situation. • Determine if present plan of action meets incident objectives. • Determine if the present plan is congruent with the incident strategic plan. • Identify current and potential problems and concerns. • Advise Incident Commander and other appropriate incident management team personnel.	I O1		
61. Collect, evaluate and process resource and situational incident information to provide the basis of the IAP.	I O1		

Behavior: Take appropriate action based on assessed risks.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
62. Establish priorities and coordinate units within the section.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

63. Schedule and facilitate planning meetings. • Inform identified planning meeting attendees of the time, location and information expected of them for the meeting. • Define objectives, agenda and time expectations for the planning meeting. • Agree to and post at appropriate locations, the planning meeting agenda. • Identify or reaffirm incident objectives (Incident Commander [IC] identifies or approves objectives. • Display, describe and utilize necessary agency/organization policy, legal and fiscal constraints and political considerations to be used in the planning meeting to review adequacy of strategic plans and in development of Incident Action Plan (IAP). • Present accurate, adequate and current situation and resource status information with accurate maps. • Ensure Operations Section Chief identifies values to be protected, division boundaries and prioritizes divisions in the event choices are made in allocating scarce resources, on map(s) visible to all attendees. • Ensure Operations Section Chief identifies tactics, resources needed and reporting/pickup locations and time by division/groups and this information is properly displayed on ICS 215 or equivalent. • Ensure the Safety Officer identifies hazards and the mitigation of those hazards by division/group and this information is displayed on an ICS 215 A (Incident Action Plan Safety Analysis) or equivalent. • Compare resources needed to implement the Operations Section Chief's proposed action plan to available resources and reconcile any differences. • Display available resources for IAP on ICS 215 • Coordinate all attendees to assure the plan as proposed can be implemented and supported; • Ensure health and safety is incorporated into the planning process. • Resolve concerns and conflicts. • Adjust IAP accordingly. • Identify elements of the IAP required from other sections, and time needed by the planning section; e.g., Safety Message, Communication Plan, Medical Plan, Air Operations Summary, Transportation Plan and other special messages. • Conduct planning meeting in 30 minutes or less.	I O1		
64. Ensure planning meetings are scheduled as required and all objectives of planning meeting are met in the acceptable time frame.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

Behavior: Modify approach based on evaluation of incident situation.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
65. Monitor incident status and develop alternative strategies. • Document and present potential alternative strategies to command and general staff. • Advise command and general staff of significant changes in incident status that affect them, in a timely manner.	I O1		

Behavior: Plan for demobilization and ensure demobilization procedures are followed.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
66. Consider demobilization and/or transition early enough during the incident so an adequate Demobilization or Transition Plan is in place prior to the actual need to release resources. • Ensure demobilization plan is complete and signed. • Develop in coordination with command and general staff and agency/organization dispatch. • Request all sections submit names or lists of surplus or potentially surplus personnel and resources to demobilization unit 48 hours in advance of them becoming surplus. • Schedule surplus resources and personnel for proper demobilization.	I O1 O2		
67. Implement approved demobilization plan and schedule.	I O1		

Behavior: Transfer position duties while ensuring continuity of authority and knowledge and taking into account the increasing or decreasing incident complexity.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
68. Monitor and document progress toward incident objectives and prepare for transition.	I O1 O2		
69. Determine with replacement time of transfer.	I O1		
70. Communicate transfer of command to command and general staff.	I O1 O2		
71. If necessary, coordinate with agencies about transfer of command back to local jurisdiction.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification.

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

There are four separate blocks allowing evaluations to be made. These evaluations may be made on incidents, simulations in classroom or in daily duties, depending on what the position task book indicates. This should be sufficient for qualification in the position if the individual is adequately prepared. If additional blocks are needed, a page can be copied from a blank task book and attached.

COMPLETE THESE ITEMS AT THE START OF THE EVALUATION PERIOD:

Evaluator's name, incident/office title, agency, and email: List the name of the evaluator, his/her incident position or office title, agency and email.

Evaluator's home unit address and phone: Self-explanatory

#: The number next to the evaluator's name in the upper left corner of the evaluation record identifies a particular incident or group of incidents. This number should be placed in the column labeled "Evaluation Record #" on the PTB for each task performed satisfactorily. This number enables reviewers of the completed PTB to ascertain the qualifications of the different evaluators prior to making the appropriate sign-off on the PTB.

Location of Incident/Simulation: Identify the location where the tasks were performed by agency and office.

Incident Kind: Enter kind of incident; e.g., hazmat, wildland fire, structural fire, search and rescue, flood, tornado, etc.

Complexity: Identify complexity of incident or sub-incident that the evaluation is for by Type.

COMPLETE THESE ITEMS AT THE END OF THE EVALUATION PERIOD:

Number and Type of Resources: Enter the number of resources and types assigned to the incident pertinent to the trainee's task book position.

Duration: Enter inclusive dates during which the trainee was evaluated. This block may indicate a span of time covering several small and similar incidents if the trainee has been evaluated on that basis; e.g., several initial response wildfires in similar fuel types.

Recommendation: Check as appropriate and/or make comments regarding the future needs for development of this trainee.

Date: List the date the record is being completed.

Evaluator's initials: Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.

Evaluator's relevant qualifications: List your relevant qualifications to the trainee position you supervised.

Evaluation Record

TRAINEE NAME	TRAINEE POSITION

#1	Evaluator's name:	Email:

Incident/office title & agency:

Evaluator's home unit address & phone:

Name and Location of Incident or Situation (agency & area)	Incident Kind (hazmat, tornado, flood, structural fire, wildfire, search & rescue, etc.)	Number & Type of Resources Pertinent to Trainee's Position	Duration (inclusive dates in trainee status)	Complexity Type 1, 2, 3

The tasks initialed and dated by me have been performed under my supervision in a satisfactory manner by the above named trainee. I recommend the following for further development of this trainee.

_____ The individual has successfully performed all tasks for the position and should be considered for certification.

_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.

_____ The individual was not able to complete certain tasks (comments below) or additional guidance is required.

_____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required and knowledge and skills needed) prior to additional assignment(s) as a trainee.

Recommendations: _____

_____

Date: _____ Evaluator's initials: _____

Evaluator's relevant:_____

#2	Evaluator's name:	Email:

Incident/office title & agency:

Evaluator's home unit address & phone:

Name and Location of Incident or Situation (agency & area)	Incident Kind (hazmat, tornado, flood, structural fire, wildfire, search & rescue, etc.)	Number & Type of Resources Pertinent to Trainee's Position	Duration (inclusive dates in trainee status)	Complexity Type 1, 2, 3

The tasks initialed and dated by me have been performed under my supervision in a satisfactory manner by the above named trainee. I recommend the following for further development of this trainee.

_____ The individual has successfully performed all tasks for the position and should be considered for certification.

_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.

_____ The individual was not able to complete certain tasks (comments below) or additional guidance is required.

_____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required and knowledge and skills needed) prior to additional assignment(s) as a trainee.

Recommendations: _____

_____

Date: _____ Evaluator's initials: _____

Evaluator's relevant:_____

Evaluation Record
(Continuation Sheet)

TRAINEE NAME	TRAINEE POSITION

#3	Evaluator's name:	Email:

Incident/office title & agency:

Evaluator's home unit address & phone:

Name and Location of Incident or Situation (agency & area)	Incident Kind (hazmat, tornado, flood, structural fire, wildfire, search & rescue, etc.)	Number & Type of Resources Pertinent to Trainee's Position	Duration (inclusive dates in trainee status)	Complexity Type 1, 2, 3

The tasks initialed and dated by me have been performed under my supervision in a satisfactory manner by the above named trainee. I recommend the following for further development of this trainee.

_____ The individual has successfully performed all tasks for the position and should be considered for certification.
_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.
_____ The individual was not able to complete certain tasks (comments below) or additional guidance is required.
_____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required and knowledge and skills needed) prior to additional assignment(s) as a trainee.

Recommendations: _____

_____

Date: _____ Evaluator's initials: _____

Evaluator's relevant:_____

#4	Evaluator's name:	Email:

Incident/office title & agency:

Evaluator's home unit address & phone:

Name and Location of Incident or Situation (agency & area)	Incident Kind (hazmat, tornado, flood, structural fire, wildfire, search & rescue, etc.)	Number & Type of Resources Pertinent to Trainee's Position	Duration (inclusive dates in trainee status)	Complexity Type 1, 2, 3

The tasks initialed and dated by me have been performed under my supervision in a satisfactory manner by the above named trainee. I recommend the following for further development of this trainee.
_____ The individual has successfully performed all tasks for the position and should be considered for certification.
_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.
_____ The individual was not able to complete certain tasks (comments below) or additional guidance is required.
_____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required and knowledge and skills needed) prior to additional assignment(s) as a trainee.

Recommendations: _____

_____

Date: _____ Evaluator's initials: _____

Evaluator's relevant:_____