

*Incident Management Task Book*

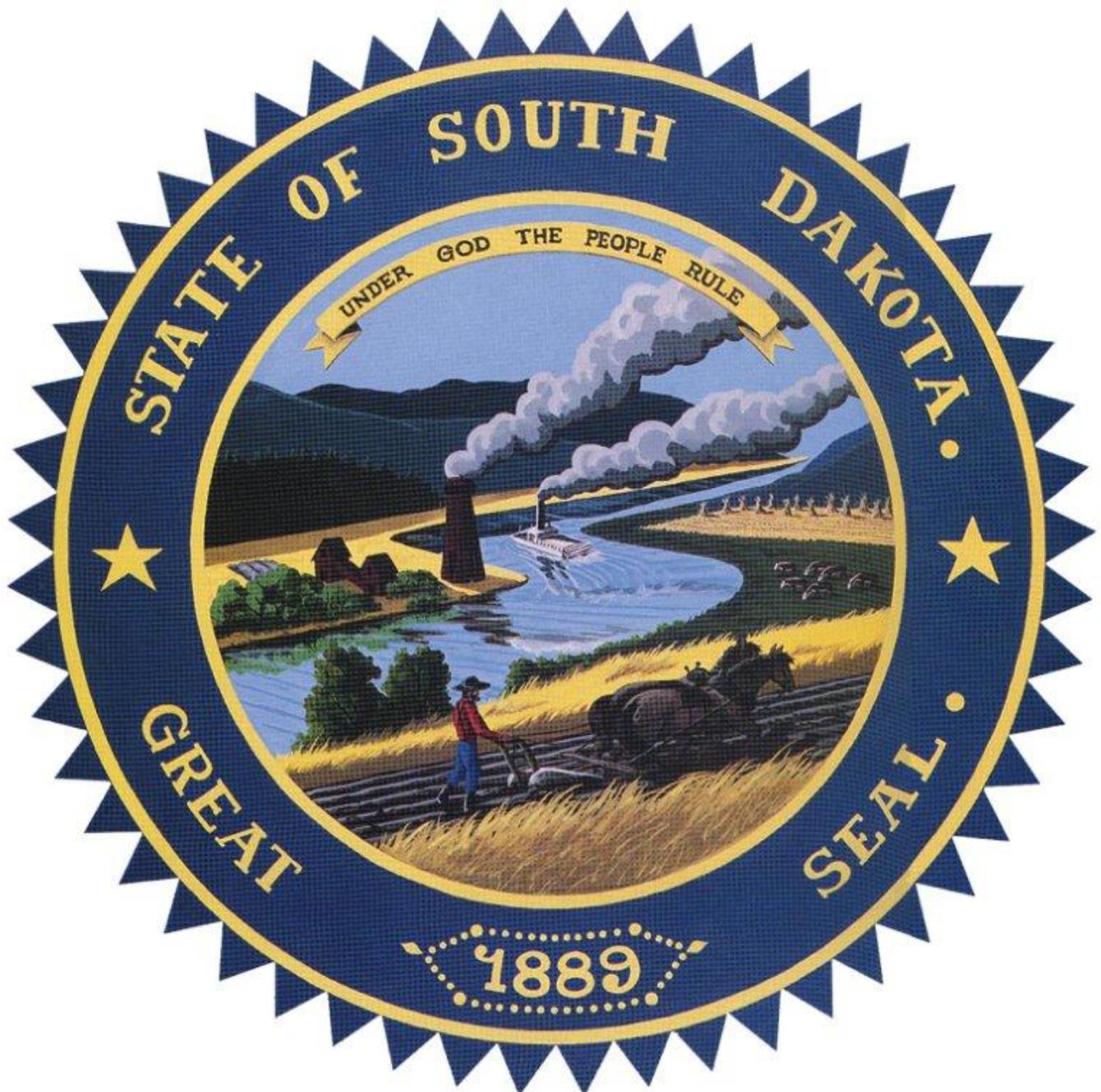
# All-Hazards

# Operations Section Chief

*March 15, 2007*



FEMA



*Incident Management Task Book*

# **All-Hazards Operations Section Chief**

Version: March 15, 2007

**POSITION TASK BOOK ASSIGNED TO:**

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INDIVIDUAL'S NAME, DUTY STATION, AND PHONE NUMBER

**POSITION TASK BOOK INITIATED BY:**

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OFFICIAL'S NAME, TITLE, DUTY STATION, AND PHONE NUMBER

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LOCATION AND DATE THAT POSITION TASK BOOK WAS INITIATED

# EVALUATOR

*Do not complete this unless you are recommending the trainee for certification*

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

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## FINAL EVALUATOR'S VERIFICATION

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

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

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FINAL EVALUATOR'S SIGNATURE AND DATE

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EVALUATOR'S PRINTED NAME, TITLE, DUTY STATION, AND PHONE NUMBER

## AGENCY HEAD RECOMMENDATION FOR CERTIFICATION

I certify that \_\_\_\_\_  
has met all requirements for qualification in this position and I recommend that they be certified for  
the position.

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OFFICIAL'S SIGNATURE AND DATE

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OFFICIAL'S NAME TITLE, DUTY STATION, AND PHONE NUMBER

# INCIDENT MANAGEMENT SYSTEM POSITION TASK BOOK

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Position Task Books (PTBs) were developed for designated positions as described under the National Interagency Incident Management System (NIIMS) and have been incorporated into the National Incident Management System (NIMS). The position task book is used by the authority having jurisdiction to certify that the person to whom the task book belongs meets the standards recommended by the National (NIMS) Integration Center (NIC).

Each PTB lists the performance requirements (tasks) for the specific position in a format that allows a trainee to be evaluated against written guidelines. Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation that the trainee be certified in that position. Evaluation and confirmation of the individual's performance of all the tasks may involve more than one evaluator and can occur on incidents, in classroom simulation, and in other work situations. Designated PTBs require position performance during which the majority of required tasks are demonstrated on a single incident. It is important that performance be critically evaluated and accurately recorded by each evaluator. All tasks must be evaluated. All bullet statements within a task that require an action (contain an action verb) must be demonstrated before that task can be signed off.

A brief list of responsibilities also appears below.

## RESPONSIBILITIES:

1. The **Agency Management** is responsible for:
  - Selecting trainees based on the needs of their organization or area Incident Management Teams.
  - Providing opportunities for evaluation and/or making the trainee available for evaluation.
  
2. The **Individual** is responsible for:
  - Reviewing and understanding instructions in the PTB.
  - Identifying desired objectives/goals.
  - Providing background information to an evaluator.
  - Satisfactorily demonstrating completion of all tasks for an assigned position within three years.
  - Assuring the evaluation record is complete.
  - Notifying the local agency head when the PTB is completed, and obtaining their signature recommending certification.
  - Keeping the original PTB in personal records.
  
3. The **Evaluator** is responsible for:
  - Being qualified and proficient in the position being evaluated.
  - 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 objectives may be attained.
  - Identifying tasks to be performed during the evaluation period.

- Accurately evaluating and recording demonstrated performance of tasks. Dating and initialing completion of the task shall document satisfactory performance. Unsatisfactory performance shall be documented in the Evaluation Record.
  - Completing the Evaluation Record found at the end of each PTB.
4. The **Final Evaluator** is responsible for signing the verification statement inside the front cover of the PTB when all tasks have been initialed.
5. The **Agency Head** or designee is responsible for:
- 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 that 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 that documentation is proper and complete.

**Competency 1: Assume position responsibilities**

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

**Behavior 1: Ensure readiness of self and crew for assignment.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
<p>1. Obtain and assemble information and materials needed for kit. Kit will be assembled and prepared prior to receiving an assignment. Kit will contain critical items needed for the assignment and items needed for functioning during the first 48 hours. Kit will be easily transportable and within agency weight limitation. The basic information and materials needed <b>may include</b>, but is not limited to, any of the following:</p> <p><b>Reference Materials</b></p> <ul style="list-style-type: none"> <li>• References appropriate for the incident type and agencies involved.</li> <li>• Functional Guidelines relative to incident type (e.g. ICS 410-1, Fireline Handbook, ICS Incident Management Handbook, or other functional guidelines).</li> <li>• ICS 420-1 Field Operations Guide.</li> <li>• OSC Position manuals.</li> <li>• Individual checklists/reminders.</li> <li>• IMT contact information.</li> </ul> <p><b>Forms</b></p> <ul style="list-style-type: none"> <li>• ICS Form 213, General Message.</li> <li>• ICS Form 214, Unit Log.</li> <li>• ICS Form 215, Operation Planning Worksheet.</li> <li>• ICS Form 220, Air Ops Summary Worksheet.</li> <li>• Agency specific forms appropriate to the function.</li> </ul> <p><b>Supplies</b></p> <ul style="list-style-type: none"> <li>• Pens/pencils/note paper/etc.</li> <li>• Office supplies appropriate to the function.</li> </ul>	O		
2. Arrive properly equipped at incident assigned location within acceptable time limits.	I		
3. Check in according to agency guidelines.	I		

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**Behavior 2: Ensure availability, qualifications, and capabilities of resources to complete assignment.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Identify kind, type and number of resources required to achieve objectives. <ul style="list-style-type: none"> <li>Consider terrain, weather, kinds and types of resources, resource availability and safety factors.</li> <li>Calculate resources needed using mathematical calculations (where applicable) and the intuitive method.</li> </ul>	I		
2. Order necessary personnel and equipment.	I		

**Behavior 3: Gather, update, and apply situational information relevant to the assignment.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Obtain complete information from dispatch upon activation. <ul style="list-style-type: none"> <li>Incident name.</li> <li>Incident order number.</li> <li>Request number.</li> <li>Reporting location.</li> <li>Reporting time.</li> <li>Transportation arrangements/travel routes.</li> <li>Contact procedures during travel (telephone/radio)</li> </ul>	I		
2. Gather information necessary to assess incident assignment and determine immediate needs and actions. <ul style="list-style-type: none"> <li>Incident Commander's name and agency address.</li> <li>Type of incident.</li> <li>Current resource commitments.</li> <li>Current situation.</li> <li>Expected duration of assignment.</li> <li>Terrain.</li> <li>Weather.</li> </ul>	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
3. Obtain briefing from Agency Administrator/ outgoing Incident Commander. <ul style="list-style-type: none"> <li>Receive Incident Commander's ICS Form 201 (Incident Briefing). Receive special instructions. Complete appropriate checklist for takeover of large incidents.</li> </ul>	I		
4. Obtain briefing from Incident Commander (May be one-on-one or an Incident Management Team (IMT) meeting.) <ul style="list-style-type: none"> <li>Receive Incident Commander's priorities, goals, and objectives for the IMT.</li> <li>Receive Incident Commander's priorities, goals, and objectives for the incident.</li> </ul>	I		
5. Collect information from outgoing Operations Section Chief, initial Incident Commander or other personnel responsible for incident prior to your arrival. <ul style="list-style-type: none"> <li>Obtain status of incident and assigned resources.</li> <li>Obtain status of existing operations section, including air operations if applicable.</li> <li>Obtain information on special situations (urban interface threat, hazardous materials, etc.)</li> <li>Order necessary personnel and equipment.</li> </ul>	I		

**Behavior 4: Establish effective relationships with relevant personnel.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Establish and maintain positive interpersonal and interagency working relationships. <ul style="list-style-type: none"> <li>Local agencies.</li> <li>Hosting unit.</li> <li>Public.</li> <li>Division/Group Supervisors.</li> <li>Command and General Staff</li> </ul>	I		
2. Create a work environment that provides mutual respect and equal opportunity for all personnel assigned to the incident.	I		

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**Behavior 5: Establish organization structure, reporting procedures, and chain of command of assigned resources.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Supervise and adjust operations organization and tactics as needed, based on changes in incident situation and resource status. <ul style="list-style-type: none"> <li>• Ensure that priorities and tactics are communicated and understood throughout the operations section.</li> <li>• Ensure that safety procedures are established and maintained throughout the operations section.</li> <li>• Ensure that any changes in priorities or tactics are communicated and understood.</li> <li>• Provide for functional and geographical supervision as needed.</li> <li>• Ensure effective use and coordination of all assigned resources.</li> <li>• Maintain appropriate span of control</li> <li>• Establish staging areas as needed.</li> </ul>	I		

**Behavior 6: Understand and comply with ICS concepts and principles.**

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

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## Competency 2: Lead assigned personnel

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

### Behavior 1: Model leadership principles of Duty, Respect and Integrity.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Exhibit principles of duty. <ul style="list-style-type: none"> <li>• Be proficient in your job, both technically and as a leader.</li> <li>• Make sound and timely decisions.</li> <li>• Ensure that tasks are understood, supervised and accomplished.</li> <li>• Develop your subordinates for the future.</li> </ul>	I		
2. Exhibit principles of respect. <ul style="list-style-type: none"> <li>• Know your subordinates and look out for their well-being.</li> <li>• Keep your subordinates informed.</li> <li>• Build the team.</li> <li>• Employ your subordinates in accordance with their capabilities.</li> </ul>	I		
3. Exhibit principles of integrity. <ul style="list-style-type: none"> <li>• Know yourself and seek improvement.</li> <li>• Seek responsibility and accept responsibility for your actions.</li> <li>• Set the example.</li> </ul>	I		

### Behavior 2: Ensure the safety, welfare, and accountability of assigned personnel.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Recognize potentially hazardous situations.	I		
2. Inform subordinates of hazards.	I		
3. Control positions and function of resources.	I		
4. Ensure that special precautions are taken when extraordinary hazards exist.	I		
5. Ensure adequate rest is provided to all unit personnel.	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
6. Provide and support a hostile-free work environment.	I		
7. Comply with agency safety requirements. <ul style="list-style-type: none"> <li>• Develop tactical plans based on safety consideration/guidelines.</li> <li>• Spot check tactical operations to ensure compliance with safety considerations.</li> </ul>	I		

**Behavior 3: Establish work assignments and performance expectations, monitor performance, and provide feedback.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Periodically evaluate resource status and tactical needs to determine if resource assignments are appropriate. <ul style="list-style-type: none"> <li>• Determine kind and number of resources required to complete tactics.</li> <li>• Assign single resources, task forces, or strike teams depending on the needs of the Division/Group Supervisors.</li> <li>• Approve assembly and disassembly of strike teams and task forces.</li> <li>• Provide for functional and geographical supervision as needed.</li> <li>• Establish staging areas as needed.</li> </ul>	I		
2. Perform the duties of a Division or Group Supervisor according to the most current version of the Field Operations Guide (ICS 420-1). <ul style="list-style-type: none"> <li>• Implement assigned portions of the IAP.</li> <li>• Assign resources within the Division or Group.</li> <li>• Report on the progress or control of operations.</li> <li>• Report on status of resources within the Division or Group.</li> </ul>	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
3. Perform the duties of a Strike Team or Task Force Leader according to the most current version of the Field Operations Guide (ICS 420-1). <ul style="list-style-type: none"> <li>• Perform tactical assignments assigned to the Strike Team or Task Force.</li> <li>• Report on work progress and status of resources.</li> <li>• Maintain work records on assigned personnel.</li> <li>• Relay important information to the supervisor.</li> </ul>	I		
4. Ensure that performance ratings are completed as required by the Incident Commander/Agency Administrator.	I		

**Behavior 4: Emphasize teamwork.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Establish cohesiveness among assigned resources. <ul style="list-style-type: none"> <li>• Establish trust through open communication.</li> <li>• Require commitment.</li> <li>• Set expectations of accountability.</li> <li>• Bring focus to the team result.</li> </ul>	I		

**Behavior 5: Coordinate interdependent activities.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Interact and coordinate with all other command staff, general staff, and appropriate Unit Leaders. <ul style="list-style-type: none"> <li>• Receive and transmit current and accurate information.</li> <li>• Communicate changes to the IAP or relevant plan.</li> <li>• Inform appropriate team members of significant changes in operations.</li> <li>• Ensure that the Resources Unit Leader is advised of all changes in status of resources assigned to the operation. Keep status current.</li> <li>• Provide Situation Unit Leader operational status for ICS 209 (Incident Status Summary).</li> </ul>	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
2. Ensure effective use and coordination of all assigned resources.	I		
3. Coordinate with the replacement Operations Section Chief. <ul style="list-style-type: none"> <li>• Brief and debrief between operational periods.</li> <li>• Coordinate the preparation of the next operational period's Incident Action Plan (IAP) or relevant plan.</li> </ul>	I		
4. Coordinate with subordinates and provide Planning Section Chief a list of excess personnel, contract equipment, crews, miscellaneous personnel and other resources. List will include: <ul style="list-style-type: none"> <li>• Kind and type.</li> <li>• Quantity.</li> <li>• Time/date of available release.</li> <li>• Review the list daily for accuracy ensuring that all units are demobilized in a timely and complete manner.</li> </ul>	I		
5. Coordinate with local response agencies (e.g., law enforcement, public health, etc.). <ul style="list-style-type: none"> <li>• Secure property.</li> <li>• Traffic control.</li> <li>• Evacuation.</li> </ul>	I		

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### Competency 3: 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 1: Ensure all relevant information is exchanged during check-in, briefings and debriefings.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Obtain briefing from Agency Administrator/ outgoing Incident Commander. <ul style="list-style-type: none"> <li>Receive Incident Commander's ICS Form 201 (Incident Briefing). Receive special instructions. Complete appropriate checklist for takeover of large incidents.</li> </ul>	I		
2. Obtain briefing from Incident Commander (May be one-on-one or an Incident Management Team (IMT) meeting.) <ul style="list-style-type: none"> <li>Receive Incident Commander's priorities, goals, and objectives for the IMT.</li> <li>Receive Incident Commander's priorities, goals, and objectives for the incident.</li> </ul>	I		
3. Collect information from outgoing Operations Section Chief, initial Incident Commander or other personnel responsible for incident prior to your arrival. <ul style="list-style-type: none"> <li>Obtain status of incident and assigned resources.</li> <li>Obtain status of existing operations section, including air operations if applicable.</li> <li>Obtain information on special situations (urban interface threat, hazardous materials, etc.)</li> <li>Order necessary personnel and equipment.</li> </ul>	I		
4. Participate in the operational period briefing, particularly emphasizing tactical priorities and any special safety considerations and changes from the written IAP.	I		
5. Brief the relief Operations Section Chief.	I		
6. Debrief the Operations Section Chief you are relieving.	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
7. Update Incident Commander on current accomplishments and/or problems. <ul style="list-style-type: none"> <li>Inform Incident Commander as soon as possible of problems and accomplishments.</li> </ul>	I		
8. Participate in Post Incident Analysis as necessary.	I		
9. Participate in after-incident review per agency policy.	I		

**Behavior 2: Ensure documentation is complete and disposition is appropriate.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Ensure that incident documentation is completed as required by the Incident Commander. <ul style="list-style-type: none"> <li>Submit incident narrative to Planning Section Chief.</li> <li>Complete and submit ICS 214 (Unit Log) to Documentation Unit for each operational period.</li> <li>Ensure all personnel and equipment time records are complete and have been submitted to the Time Unit Leader/ Equipment Time Recorder at the end of each operational period.</li> <li>Complete ICS Form 220 (Air Operations Summary Worksheet) as necessary.</li> <li>Complete and submit performance evaluations for Operations Section resources at conclusion of incident.</li> </ul>	I		

**Behavior 3: Gather, produce and distribute information as required by established guidelines and ensure understanding by recipient.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Prepare for and participate in strategy meetings. <ul style="list-style-type: none"> <li>Share and evaluate operational information with Incident Management Team (IMT) members.</li> </ul>	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
2. Report special events (incidents within an incident, accidents, political contacts, property loss or damage, etc.). <ul style="list-style-type: none"> <li>• Obtain information about special events from:                             <ul style="list-style-type: none"> <li>- Subordinates.</li> <li>- Personal observation.</li> <li>- Other incident personnel.</li> <li>- Off-incident personnel.</li> </ul> </li> <li>• Ensure standard information contains nature of event, location, magnitude, personnel involved (do not release names of victims or agency over radio), initial action taken; e.g., helicopter picking up injured, appropriate subsequent action.</li> </ul>	I		

**Behavior 4: Communicate and assure understanding of work expectations within the chain of command and across functional areas.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Ensure that priorities and tactics are communicated and understood throughout the operations section.	I		
2. Ensure that any changes in priorities or tactics are communicated and understood.	I		

**Behavior 5: Develop and implement plans and gain concurrence of affected agencies and the public.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Participate in preparation of IAP or relevant plan. <ul style="list-style-type: none"> <li>• Update team on current situation.</li> <li>• Determine tactical priorities for next operational period.</li> <li>• Determine tactics and work assignments for next operational period or periods.</li> <li>• Advise on current capabilities and limitations.</li> <li>• Determine additional/excess resources.</li> </ul>	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
2. Complete operational portion of IAP as part of ICS 215 (Operational Planning Worksheet). <ul style="list-style-type: none"> <li>• Establish branches, divisions/groups, and staging areas.</li> <li>• Establish priorities for aviation operations, if necessary.</li> </ul>	I		
3. Participate in the preparation of other necessary relevant plans (e.g., evacuation plan, contingency plan).	I		

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**Competency 4: 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 1: Administer and/or apply agency policy, contracts and agreements.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Ensure assigned contracted resources meet contract specifications. <ul style="list-style-type: none"> <li>• Take necessary action for those not meeting specifications.</li> </ul>	I		
2. Designate and request agreements as necessary. <ul style="list-style-type: none"> <li>• Coordinate with Finance Section.</li> </ul>	I		

**Behavior 2: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Evaluate and monitor current situation. <ul style="list-style-type: none"> <li>• Determine if present plan of action will meet incident objectives.</li> <li>• Determine if the present plan is congruent with the incident strategic plan.</li> <li>• Identify problems and concerns (evacuation, sheltering, aviation safety, etc.).</li> <li>• Identify resources to be protected (structures, natural, improvements, infrastructure, etc.).</li> <li>• Advise Incident Commander and other appropriate incident management team personnel.</li> </ul>	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
2. Identify kind, type, and number of resources required to achieve objectives. <ul style="list-style-type: none"> <li>• Consider incident type and complexity, kinds and types of resources, resource availability, and safety factors.</li> <li>• Order necessary personnel and equipment.</li> <li>• Discuss long-range and contingency plans and identify potential and future resources.</li> </ul>	I		
3. Personally observe and review current operations to prepare tactics for the next operational period planning meeting considering: <ul style="list-style-type: none"> <li>• Resource status.</li> <li>• Situation status.</li> <li>• Weather.</li> <li>• Communications capability.</li> <li>• Environmental impact.</li> <li>• Resources to be protected.</li> <li>• Cost constraints.</li> <li>• Aviation capabilities, limitations.</li> </ul>	I		

**Behavior 3: Prepare clear and concise assessments regarding hazards, fire behavior, weather, and other relevant events.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Assist in completing and validate LCES ICS 215A (Incident Action Plan Safety Analysis).	I		

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**Behavior 4: Make appropriate decisions based on analysis of gathered information.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Personally observe and review current operations to prepare tactics for the next operational period planning meeting considering: <ul style="list-style-type: none"> <li>• Resource status.</li> <li>• Situation status.</li> <li>• Weather.</li> <li>• Communications capability.</li> <li>• Environmental impact.</li> <li>• Resources to be protected.</li> <li>• Cost constraints.</li> <li>• Aviation capabilities, limitations.</li> </ul>	I		
2. Periodically evaluate resource status and tactical needs to determine if resource assignments are appropriate. <ul style="list-style-type: none"> <li>• Determine kind and number of resources required to complete tactics.</li> <li>• Assign single resources, task forces, or strike teams.</li> <li>• Assemble and disassemble strike teams and task forces.</li> </ul>	I		

**Behavior 5: Utilize information to produce outputs.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Report special events, (incidents, accidents, political contacts, property loss or damage, etc.). <ul style="list-style-type: none"> <li>• Obtain information about special events from:                             <ul style="list-style-type: none"> <li>- Subordinates.</li> <li>- Personal observation.</li> <li>- Other incident personnel.</li> <li>- Off incident personnel.</li> </ul> </li> <li>• Standard information shall contain nature of event, location, magnitude, personnel involved (do not release names of victims or agency over radio), initial action taken (e.g., helicopter picking up injured), and appropriate subsequent action.</li> </ul>	I		

Code:

- O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)
- I = task must be performed on an incident
- R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

**Behavior 6: Take appropriate action based on assessed risks.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Ensure the Risk Management Process is established and maintained throughout the operations section.	I		
2. Ensure effective use and coordination of all assigned resources. <ul style="list-style-type: none"> <li>• Include aviation resources.</li> </ul>	I		

**Behavior 7: Modify approach based on evaluation of incident situation.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Evaluate effectiveness of IAP or relevant plan and adjust as necessary. <ul style="list-style-type: none"> <li>• Evaluate progress of operations based on situation reports and evaluations from operations personnel.</li> <li>• Estimate immediate and long-range operational resources and logistical requirements.</li> <li>• Order or release resources as needed, providing appropriate lead time.</li> </ul>	I		

**Behavior 9: Plan for demobilization and ensure demobilization procedures are followed.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Assist in development, approval, and implementation of Incident Demobilization Plan. <ul style="list-style-type: none"> <li>• Consider demobilization early in the incident.</li> <li>• Coordinate with the Demobilization Unit/ Planning Section Chief during development and implementation of Demobilization Plan.</li> <li>• Coordinate during development and implementation with local agency concerning functional demobilization procedures.</li> <li>• Brief staff on demobilization responsibilities.</li> <li>• Ensure that all units are demobilized in a timely and complete manner.</li> <li>• If required, complete ICS 221 (Demobilization Check-out) and turn in to the appropriate person.</li> <li>• Brief replacement if necessary.</li> </ul>	I		

Code:

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**Behavior 10: 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
1. Coordinate the development, approval and implementation of transfer of duties when incident escalates/deescalates. • Consider transition early in the incident.	I		
2. Determine time of transfer with replacement.	I		
3. Communicate transfer of duties to assigned resources and command staff.	I		
6. If necessary, coordinate with agencies about transfer of command back to local jurisdiction.	I		

## Code:

- O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)
- I = task must be performed on an incident
- R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

## 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, and agency:** List the name of the Evaluator, his/her incident position or office title, and agency.

**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 will enable 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.

### Complete These Items at the END of the Evaluation Period:

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**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 attack 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 certification:** List **your** certification relevant to the Trainee position you supervised.

# Evaluation Record

\_\_\_\_\_  
 TRAINEE NAME

\_\_\_\_\_  
 TRAINEE POSITION

#1	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation <i>(agency &amp; area)</i>	Incident Kind <i>(Hazmat, tornado, flood,                  structural fire, wildfire,                  search &amp; rescue, etc.)</i>	Number & Type of Resources Pertinent to Trainee's Position	Duration <i>(inclusive dates                  in trainee status)</i>	
			to	
The tasks initialed & 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. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.				
Recommendations: _____ _____				
Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

#2	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation <i>(agency &amp; area)</i>	Incident Kind <i>(Hazmat, tornado, flood,                  structural fire, wildfire,                  search &amp; rescue, etc.)</i>	Number & Type of Resources Pertinent to Trainee's Position	Duration <i>(inclusive dates                  in trainee status)</i>	
			to	
The tasks initialed & 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. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.				
Recommendations: _____ _____				
Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

## Evaluation Record

(Continuation Sheet)

\_\_\_\_\_  
TRAINEE NAME

\_\_\_\_\_  
TRAINEE POSITION

#3	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation <i>(agency &amp; area)</i>	Incident Kind <i>(Hazmat, tornado, flood,                  structural fire, wildfire,                  search &amp; rescue, etc.)</i>	Number & Type of Resources Pertinent to Trainee's Position	Duration <i>(inclusive dates                  in trainee status)</i>	
			to	
The tasks initialed & 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. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.  Recommendations: _____  _____  Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

#4	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation <i>(agency &amp; area)</i>	Incident Kind <i>(Hazmat, tornado, flood,                  structural fire, wildfire,                  search &amp; rescue, etc.)</i>	Number & Type of Resources Pertinent to Trainee's Position	Duration <i>(inclusive dates                  in trainee status)</i>	
			to	
The tasks initialed & 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. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.  Recommendations: _____  _____  Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

