



# FEMA

POSITION TASK BOOK FOR THE POSITION OF

## PLANNING SECTION CHIEF (TYPE 1)

Version: June 2021

Check the appropriate position type:

Single Type     Type 1     Type 2     Type 3

<b>POSITION TASK BOOK ASSIGNED TO:</b>	
TRAINEE'S NAME:	
DUTY STATION:	
PHONE NUMBER:	
EMAIL:	
<b>POSITION TASK BOOK INITIATED BY:</b>	
OFFICIAL'S NAME:	
TITLE:	
DUTY STATION:	
PHONE NUMBER:	
EMAIL:	
<b>POSITION TASK BOOK WAS INITIATED:</b>	
LOCATION:	
DATE:	

## Evaluator Verification

*(Do not complete this form unless you are recommending the trainee for all-hazards certification.)*

<b>FINAL EVALUATOR VERIFICATION</b>
I verify that _____ has successfully completed all tasks as a trainee and should therefore be considered for certification in this position. I also verify that all tasks are documented with appropriate initials.
FINAL EVALUATOR'S SIGNATURE:
DATE:
FINAL EVALUATOR'S PRINTED NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:

## Documentation of Agency Certification

<b>DOCUMENTATION OF AGENCY CERTIFICATION</b>
I certify that _____ has successfully met all of the criteria set out in the National Incident Management System (NIMS) Job Title/Position Qualifications document for the position and will hereby receive certification of his/her qualification.
OFFICIAL'S SIGNATURE:
DATE:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:

## Position Task Book Overview

The Position Task Book (PTB) documents the performance criteria a trainee must meet to be certified for a position within the National Qualification System (NQS). The performance criteria are associated with core NQS competencies, behaviors and tasks.

**A trainee may not work on multiple position type PTBs for a specific position at the same time; for example, a trainee may not simultaneously work on a Type 1 Incident Commander PTB and a Type 2 Incident Commander PTB. If a position has multiple types, the trainee must, in most cases, qualify at the lowest type before pursuing the next higher type. For example, before seeking qualification for a Type 1 position, an individual must first qualify at the Type 3 level and then at the Type 2 level.**

### *Evaluation Process*

- Evaluators observe and review a trainee's completion of PTB tasks, initialing and dating each successfully completed task in the PTB.
- Evaluators complete an Evaluation Record Form after each evaluation period by documenting the trainee's performance.
- The Authority Having Jurisdiction (AHJ) may not have enough resources to ensure that every evaluator is qualified in the position being assessed. Therefore, a trainee's supervisor may evaluate the completion of PTB tasks. For example, a Logistics Section Chief has the authority to sign off on completed PTB tasks for a Food Unit Leader trainee.
- The final evaluator is a leader who verifies that a trainee has completed the PTB and met all requirements for the position. A final evaluator is generally qualified in the same position for which the trainee is applying. When possible, the evaluator and the final evaluator should not be the same person, but in situations with limited resources, the evaluator can also serve as the final evaluator.
- Once the final evaluator has completed the Final Evaluator Verification, he/she forwards it to the Qualifications Review Board (QRB) along with supporting evidence that the trainee has completed all position requirements.
- After the QRB review, the AHJ completes the Documentation of Agency Certification form as appropriate.

### *Transferring Qualifications*

- Personnel who have documentation of previous education, training or significant on-the-job incident experience may receive credit toward qualification for a given position. Each AHJ establishes the requirements for transferring qualifications from another AHJ.
- If an AHJ chooses not to accept a trainee's existing certification of qualification, the trainee may be reevaluated in the specific position and issued a new PTB.
- An individual may hold multiple certifications of qualification (that is, the Final Evaluator Verification form and the Documentation of Agency Certification form) along with the completed PTB.

## Position Task Book Competencies, Behaviors and Tasks

**The PTB sets minimum criteria for certification for a position. The AHJ has the authority to add content to the baseline PTB competencies, behaviors and tasks as necessary.**

The PTB covers all type levels for a given position, but an AHJ may check only one “Type” box and work on only one type at a time. (The National Incident Management System (NIMS) Job Title/Position Qualifications document describes all types.)

**Command and General Staff job titles/positions qualifications are typed based on incident complexity, while all other NIMS positions are typed based on the minimum qualifications.**

### *Definitions*

**Competency:** An observable, measurable pattern of knowledge, skills, abilities and other characteristics an individual needs to perform an activity and its associated tasks. A competency specifies the skillset a person needs to possess to complete the tasks successfully.

**Behavior:** An observable work activity or a group of similar tasks necessary to perform the activity.

**Task:** A specific, demonstrable action necessary for successful performance in a position. Trainees must demonstrate completion of required tasks.

- Occasionally, PTB tasks are unique to one of the types; for example, certain tasks apply only to a Type 3 Incident Commander, not to a Type 2 or Type 1 Incident Commander. In those cases, the PTB indicates the corresponding type at the beginning of the task.
- All tasks require evaluation. Bullet statements within a task are only examples and do not need to be performed to have a task signed off.

### *PTB Task Codes*

For each of the tasks listed in the Position Task Book (PTB), there are one or more codes describing the circumstances in which the trainee can perform tasks related to the position. If a task has multiple codes listed, it means the evaluator can assess the trainee on any of those circumstances as opposed to evaluating the trainee on all of the listed codes.

**Code C:** Task performed in training or classroom setting, including seminars and workshops.

**Code E:** Task performed on a full-scale exercise with equipment deployment under the Incident Command System (ICS).

**Code F:** Task performed during a functional exercise managed under the ICS.

**Code I:** Task performed on an incident or event managed under ICS. Examples of incidents and events that may employ ICS include but are not limited to an oil spill, search and rescue, hazardous material response, fire and emergency or non-emergency (planned or unplanned) events.

**Code J:** Task performed as part of day-to-day job duties.

**Code T:** Task performed during a tabletop exercise.

**Code R:** Task performed very rarely and required only if applicable to the event. *Note:* Assignment of Code R is not recommended. However, AHJs may add at their discretion to tasks added to NQS PTBs.

## How to Complete the Evaluation Record Form

Each Evaluation Record Form (see next page) covers one evaluation period. Evaluation periods may involve incidents, classroom simulations or daily duties, depending on what the PTB recommends. The AHJ determines the number of evaluations required for position qualification and certification. If evaluators need additional evaluation periods, they can copy pages from a blank PTB and attach them to the PTB in question.

### Complete these items AT THE START of the evaluation period:

**Evaluation Record Number:** Label each evaluation record with a number to identify the incident(s), exercise(s) or event(s) during which the trainee completed the PTB tasks. The evaluator should also write this number in the PTB column labeled “Evaluation Record #” for each task performed satisfactorily. This number enables reviewers of the completed PTB to ascertain the evaluators’ qualifications before signing off on the PTB.

**Evaluator’s name; Incident/office title and agency:** List the name of the evaluator, his/her incident position or office title and the evaluator’s home agency.

**Evaluator’s home jurisdiction address and phone:** List evaluator’s home jurisdiction address and phone number.

**Name and location of incident or simulation/exercise:** Identify the name (if applicable) and location where the trainee performed the tasks.

**Incident kind:** Enter the kind of incident (such as hazmat, law enforcement, wildland fire, structural fire, search and rescue, flood or tornado).

### Complete these items AT THE END of the evaluation period:

**Number and kind of resources:** Enter the number of resources assigned to the incident and their kind (such as team, personnel and equipment) pertinent to the trainee’s PTB.

**Evaluation period:** Enter inclusive dates of trainee evaluation. This time span may cover several small, similar incidents.

**Position type:** Enter position type (such as Type 3, Type 2, Type 1 or Single Type).

**Recommendation:** Check the appropriate line and make comments below regarding the trainee’s future development needs.

**Additional recommendations/comments:** Provide additional recommendations and comments about trainee, as necessary.

**Date:** List the current date.

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

**Evaluator’s relevant qualification:** List your certification relevant to the trainee position you supervised.

## Evaluation Record Form

<b>TRAINEE NAME:</b>
<b>TRAINEE POSITION:</b>
<b>Evaluation Record Number:</b>
<b>Evaluator's name:</b>
<b>Incident/office title and agency:</b>
<b>Evaluator's home jurisdiction address and phone:</b>
<b>Name and location of incident or simulation/exercise:</b>
<b>Incident kind:</b>
<b>Number and kind of resources:</b>
<b>Evaluation period:</b>
<b>Position type:</b>
<b>Recommendation:</b> The above named trainee performed the initialed and dated tasks under my supervision. I recommend the following for this trainee's further development: <input type="checkbox"/> The trainee has successfully performed all required tasks for the position. The AHJ should consider the individual for certification. <input type="checkbox"/> The trainee could not complete certain tasks or needs additional guidance. See comments below. <input type="checkbox"/> Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation. <input type="checkbox"/> The trainee is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a trainee for this position.
<b>Additional recommendations/comments:</b>
<b>Date:</b>
<b>Evaluator's initials:</b>
<b>Evaluator's relevant qualification:</b>

## PLANNING SECTION CHIEF (TYPE 1)

### 1. Competency: Assume position responsibilities

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

#### 1a. Behavior: Ensure readiness for assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>1. Obtain, assemble and prepare information and materials for go-kit. The kit should contain critical items for the assignment and be easily transportable:</p> <ul style="list-style-type: none"> <li>● Supplies:                             <ul style="list-style-type: none"> <li>○ Office supplies appropriate to the function</li> <li>○ Authority Having Jurisdiction (AHJ) identification badge and qualification card</li> </ul> </li> <li>● Reference materials:                             <ul style="list-style-type: none"> <li>○ Functional guidelines relative to incident type (agency guidance or other functional guidelines)</li> <li>○ AHJ operations guides or other operational guides</li> <li>○ Position manuals</li> </ul> </li> <li>● Forms:                             <ul style="list-style-type: none"> <li>○ Agency-specific forms appropriate to the function</li> </ul> </li> </ul>	E, F, I		
<p>2. Obtain complete incident and logistical information:</p> <ul style="list-style-type: none"> <li>● Incident name, number, anticipated duration, size, type, responsibilities and expectations</li> <li>● Reporting time and location</li> <li>● Transportation arrangements and travel routes</li> <li>● Contact procedures during travel (telephone/radio)</li> <li>● Expected working conditions</li> <li>● Personal Protective Equipment (PPE)</li> <li>● Security measures</li> <li>● Updated contact information and information links</li> </ul>	E, F, I		
<p>3. Arrive properly equipped at designated time and location and check in according to agency/organization guidelines:</p> <ul style="list-style-type: none"> <li>● Arrive with go-kit and any additional equipment</li> <li>● Carry out check-in procedures and ensure assigned personnel do the same</li> </ul>	E, F, I		

#### 1b. Behavior: Obtain information relevant to position assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

<p>4. Receive briefing from the Incident Commander (IC) or outgoing Planning Section Chief:</p> <ul style="list-style-type: none"> <li>● Meetings and briefings schedule</li> <li>● Situational assessment</li> <li>● Incident objectives</li> <li>● Strategy</li> <li>● Hazards to incident personnel and public</li> <li>● Agencies/jurisdictions involved</li> <li>● Organizational structure</li> <li>● Resources summary</li> <li>● Logistical needs</li> <li>● Ordering procedures</li> <li>● Incident priorities and status: life safety, incident stabilization, property and environment</li> <li>● Timing and scheduling</li> <li>● Expected products</li> </ul>	<p>E, F, I</p>		
<p>5. Obtain and review necessary documentation:</p> <ul style="list-style-type: none"> <li>● Copy of Delegation of Authority, Letter of Expectation, Letter of Agreement or Memorandum of Understanding (MOU)</li> <li>● Applicable plans and reports</li> <li>● Directories: phone, notification</li> <li>● Written incident status summary</li> <li>● Authorizations: cell phones, rental vehicles, computers</li> </ul>	<p>E, F, I</p>		

**1c. Behavior: Establish or determine organizational structure, resource and staffing needs**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>6. Evaluate staffing needs required to manage the section:</p> <ul style="list-style-type: none"> <li>● Ensure consistency with National Incident Management System (NIMS) organizational structure</li> <li>● Identify training opportunities</li> <li>● Ensure use of established procedures for ordering resources</li> <li>● Request appropriate technical specialists to assist with special incident conditions</li> </ul>	<p>E, F, I</p>		
<p>7. Utilize section personnel:</p> <ul style="list-style-type: none"> <li>● Establish appropriate organization and assign roles and responsibilities, while maintaining span of control</li> </ul>	<p>E, F, I</p>		
<p>8. Organize meeting and briefing locations and ensure that necessary materials are available:</p> <ul style="list-style-type: none"> <li>● Large-scale operational planning worksheet and Incident Action Plan (IAP) safety analysis</li> <li>● Large-scale schematic map of incident</li> <li>● Large-scale charts for filling in objectives and operational rhythm/meeting schedule</li> <li>● Planning meeting agenda</li> <li>● List of incident priorities and objectives</li> </ul>	<p>E, F, I</p>		



<p><b>9.</b> Work closely with Operations Section personnel to identify kind, type and number of resources required to achieve section objectives:</p> <ul style="list-style-type: none"> <li>● Consider incident type and complexity, kinds and types of resources, resource availability and health and safety factors</li> <li>● Consider long-range and contingency plans and identify potential future resources</li> </ul>	<p>E, F, I</p>		
<p><b>10.</b> Work closely with the Safety Officer to identify safety issues and materials for inclusion in plans.</p>	<p>E, F, I</p>		

**2. Competency: Lead assigned personnel**

*Description:* Influence, lead and direct assigned personnel to accomplish objectives and desired outcomes in a potentially rapidly changing environment.

**2a. Behavior: Model leadership values and principles**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>11.</b> Understand and comply with NIMS/Incident Command System (ICS) concepts and principles: <ul style="list-style-type: none"> <li>● Establish and modify an effective organization based on changing incident and resource conditions</li> <li>● Maintain appropriate span of control</li> <li>● Act as a representative of incident leadership</li> </ul>	E, F, I		
<b>12.</b> Create a positive work environment: <ul style="list-style-type: none"> <li>● Communicate leader’s intent and guidance</li> <li>● Manage section and its activities effectively</li> <li>● Proactively assume responsibility for the section and initiate action</li> </ul>	E, F, I		
<b>13.</b> Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
<b>14.</b> Establish and maintain positive interpersonal and interagency working relationships: <ul style="list-style-type: none"> <li>● Understand scope, roles, responsibilities, jurisdiction and authority of responding agencies</li> </ul>	E, F, I		

**2b. Behavior: Communicate incident priorities and supervise personnel**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>15.</b> Communicate with assigned personnel: <ul style="list-style-type: none"> <li>● Communicate priorities, objectives, strategies and any changes</li> <li>● Inform personnel of their assigned tasks and expectations</li> <li>● Clearly explain conflict resolution procedures and ensure that personnel understand</li> <li>● Ensure that assigned objectives and expectations for the operational period are reasonable and accurate</li> </ul>	E, F, I		
<b>16.</b> Ensure that staff follows all applicable agency/jurisdiction policies, contracts, standard operating procedures and agreements: <ul style="list-style-type: none"> <li>● Federal, state, local, tribal, territorial and regional relationships, as appropriate</li> <li>● Roles and responsibilities of potential responder agencies</li> <li>● Scope, jurisdiction and authority of potential responder agencies’ contingency plans</li> </ul>	E, F, I		

<p><b>17.</b> Supervise and hold personnel accountable for executing assigned tasks:</p> <ul style="list-style-type: none"> <li>● Identify and promptly resolve disagreements, issues and misunderstandings</li> <li>● Prioritize work while considering immediate support for incident operations</li> </ul>	E, F, I		
<p><b>18.</b> Ensure debriefings occur and participate as necessary:</p> <ul style="list-style-type: none"> <li>● Ensure incident situation status information is current and complete</li> </ul>	E, F, I		

**2c. Behavior: Ensure the health, safety, welfare and accountability of assigned personnel**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>19.</b> Evaluate mental and physical fatigue of assigned personnel:</p> <ul style="list-style-type: none"> <li>● Ensure adequate rest is provided to section personnel</li> </ul>	E, F, I		
<p><b>20.</b> Recognize potentially hazardous situations, inform assigned personnel of hazards and take precautions to mitigate risk:</p> <ul style="list-style-type: none"> <li>● Adjust operations in response to hazards, weather and other relevant events</li> </ul>	E, F, I		
<p><b>21.</b> Demonstrate knowledge of and comply with relevant health and safety requirements:</p> <ul style="list-style-type: none"> <li>● Direct and oversee section operations to ensure compliance with health and safety considerations and guidelines</li> <li>● Coordinate with the Safety Officer to ensure that assigned personnel follow safety guidelines</li> </ul>	E, F, I		
<p><b>22.</b> Report or explain the procedures for reporting unexpected occurrences, such as fire, death, injury, illness, exposure to pathogens or hazardous materials (HAZMAT), accident, political contact or property loss or damage:</p> <ul style="list-style-type: none"> <li>● Ensure report contains nature of event, location, magnitude, personnel involved and initial action taken (such as helicopter picking up injured or an appropriate subsequent action)</li> <li>● Ensure the protection of Personally Identifiable Information (PII) while reporting</li> <li>● Obtain information from the following sources regarding special hazards, threats or unexpected occurrences: subordinates, personal observation, other incident personnel and off-incident personnel</li> </ul>	E, F, I		

**2d. Behavior: Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>23.</b> Demonstrate the ability to identify opportunities for universal accessibility.</p>	E, F, I, J		

<p><b>24.</b> Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access.</p>	<p>E, F, I, J</p>		
<p><b>25.</b> Provide equal access, disability accommodations and access and functional needs (AFN) accommodations.</p>	<p>E, F, I, J</p>		

### 3. Competency: Conduct operations and ensure completion of assigned tasks

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

#### 3a. Behavior: Set the section priorities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>26.</b> Attend and participate in strategy meetings as necessary: <ul style="list-style-type: none"> <li>● Assess organizational needs</li> <li>● Identify additional resource needs</li> <li>● Identify critical factors to ensure section success</li> <li>● Prioritize incident and section objectives</li> </ul>	E, F, I, J		
<b>27.</b> Disseminate priorities and expected completion timelines to staff.	E, F, I		
<b>28.</b> Analyze work assignments and staffing levels to ensure achievement of section objectives.	E, F, I		
<b>29.</b> Hold staff accountable for communicated priorities and deadlines.	E, F, I		

#### 3b. Behavior: Develop and implement plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>30.</b> Facilitate and participate in the planning process: <ul style="list-style-type: none"> <li>● Prepare for and participate in planning meetings</li> <li>● Assist in the development of plans, as necessary:               <ul style="list-style-type: none"> <li>○ Long-range</li> <li>○ Strategic</li> <li>○ Contingency</li> <li>○ Demobilization</li> <li>○ Continuity of Operations Plan (COOP)</li> </ul> </li> </ul>	E, F, I		
<b>31.</b> Review, validate and modify plans: <ul style="list-style-type: none"> <li>● Analyze alternate strategies and explain decisions</li> <li>● Validate or revise section objectives</li> <li>● Review information covering health and safety principles, known hazards and importance of all periods</li> <li>● Validate section organizational structure</li> <li>● Validate section resource assignments</li> <li>● Review reserve resources</li> <li>● Evaluate immediate support needs</li> </ul>	E, F, I		
<b>32.</b> Approve completed plans: <ul style="list-style-type: none"> <li>● Ensure plans are complete, accurate, realistically attainable and relevant to the incident objectives</li> </ul>	E, F, I		
<b>33.</b> Coordinate submission of incident status summary: <ul style="list-style-type: none"> <li>● Ensure that it is accurate and complete</li> <li>● Include priorities and special considerations</li> <li>● Abide by established time frames</li> <li>● Include IC's signature</li> </ul>	E, F, I		

<p><b>34.</b> Coordinate with Command and General Staff to identify the need for contingency plans:</p> <ul style="list-style-type: none"> <li>● Severe weather</li> <li>● “Incident within an incident”</li> <li>● Evacuation</li> </ul>	<p>C, E, F, I, J</p>		
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**3c. Behavior: Coordinate with all appropriate personnel and stakeholders**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>35.</b> Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s).</p>	<p>E, F, I</p>		
<p><b>36.</b> Establish effective relationships and coordinate with incident personnel:</p> <ul style="list-style-type: none"> <li>● IMT personnel</li> <li>● Other supporting personnel</li> </ul>	<p>E, F, I</p>		

**3d. Behavior: Apply agency policy, contracts and agreements**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>37.</b> Demonstrate knowledge of and apply relevant legal, regulatory and fiscal constraints.</p>	<p>E, F, I</p>		
<p><b>38.</b> Complete all work according to organization/agency direction, policy and incident objectives:</p> <ul style="list-style-type: none"> <li>● Ensure that personnel complete all documentation requirements according to organization/agency direction, policy and incident objectives</li> </ul>	<p>E, F, I</p>		

**3e. Behavior: Make appropriate decisions based on evaluation of gathered information, risks and incident situation and use information to produce outputs and modify approach**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

<p><b>39.</b> Evaluate special conditions, existing or predicted, that require technical expertise:</p> <ul style="list-style-type: none"> <li>● Hazards</li> <li>● Reconnaissance</li> <li>● Objectives</li> <li>● Access/egress</li> <li>● Values to be protected</li> <li>● Evacuation/sheltering potential</li> <li>● Communications</li> <li>● Organizational structure</li> <li>● Tactical coordination</li> <li>● Weather and topography</li> <li>● Responder fatigue</li> <li>● Logistical considerations</li> <li>● Jurisdictional responsibilities</li> <li>● Span of control</li> </ul>	E, F, I		
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**3f. Behavior: Ensure documentation is complete**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>40.</b> Review documents for accuracy, timeliness and appropriate distribution.</p>	E, F, I		
<p><b>41.</b> Maintain and collect personal records related to incident:</p> <ul style="list-style-type: none"> <li>● Time sheets</li> <li>● Rental records</li> <li>● Accident forms</li> <li>● Property records                             <ul style="list-style-type: none"> <li>○ Equipment time records</li> </ul> </li> <li>● Receipts</li> </ul>	E, F, I		
<p><b>42.</b> Maintain and submit incident records for events, personnel, equipment, supplies and other data for incident management needs:</p> <ul style="list-style-type: none"> <li>● Property loss/damage reports</li> <li>● Agency-required incident reports</li> <li>● Activity log</li> <li>● Changes in strategy and tactics</li> </ul>	E, F, I		
<p><b>43.</b> Ensure all units that handle data or intelligence are aware of and maintain a document security plan to manage the confidentiality and security of any classified, confidential, sensitive and For Official Use Only (FOUO) documentation, intelligence, data or incident information</p>	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

<p><b>44.</b> Supervise or ensure completion of the duties of a Demobilization Unit Leader:</p> <ul style="list-style-type: none"> <li>● Review incident resource records to determine likely size and extent of the demobilization effort and request personnel, workspace and supplies as necessary</li> <li>● Obtain IC demobilization objectives and priorities</li> <li>● Evaluate logistics and transportation capabilities to support demobilization</li> <li>● Develop demobilization plan</li> <li>● Implement and monitor the demobilization process</li> </ul>	E, F, I		
<p><b>45.</b> Supervise or ensure completion of the duties of a Documentation Unit Leader:</p> <ul style="list-style-type: none"> <li>● Coordinate with functional areas for the collection of incident documentation</li> <li>● Establish duplication service and respond to requests</li> <li>● Maintain, safeguard and securely store incident records</li> <li>● Provide incident documentation per document security guidelines, as requested</li> <li>● Organize files in preparation for submitting final incident documentation package</li> </ul>	E, F, I		
<p><b>46.</b> Supervise or ensure completion of the duties of a Resources Unit Leader:</p> <ul style="list-style-type: none"> <li>● Establish and monitor the check-in function at incident locations</li> <li>● Provide resource status data as requested</li> <li>● Maintain and post the current status and location of all resources</li> <li>● Maintain master roster of all resources checked in at the incident</li> <li>● Continually identify surplus resources</li> <li>● Assemble and review draft IAP</li> </ul>	E, F, I		
<p><b>47.</b> Supervise or ensure completion of the duties of a Situation Unit Leader:</p> <ul style="list-style-type: none"> <li>● Collect and analyze incident data</li> <li>● Prepare, post or disseminate resource and situation status information as required, including special requests</li> <li>● Provide photographic services, charts, image overlays and maps</li> <li>● Collect, process, organize and disseminate incident information relating to status of current operations, incident growth, mitigation or intelligence activities</li> <li>● Conduct situation briefings at meetings and briefings</li> </ul>	E, F, I		

**3h. Behavior: Facilitate planning process**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>48.</b> Facilitate planning meetings and share pertinent information:</p> <ul style="list-style-type: none"> <li>● Expected duration</li> <li>● Changes in objectives or strategies</li> <li>● Approval of IAP</li> <li>● Additional responsibilities</li> <li>● Changes in jurisdictional involvement</li> </ul>	E, F, I		



<p><b>49.</b> Schedule and facilitate operational briefings:</p> <ul style="list-style-type: none"> <li>● Clearly post the location and time of the operational briefing</li> <li>● Emphasize any changes from the written IAP</li> </ul>	E, F, I		
<p><b>50.</b> Inform identified attendees of planning meeting time, location and information expected of them:</p> <ul style="list-style-type: none"> <li>● Define meeting objectives, agenda and time expectations</li> <li>● Post agenda at appropriate locations</li> </ul>	E, F, I		
<p><b>51.</b> Ensure presenters understand and adhere to their roles and responsibilities during meetings and briefings:</p> <ul style="list-style-type: none"> <li>● Operational briefings</li> <li>● Tactics meetings</li> <li>● Planning meetings</li> <li>● Strategy meetings</li> <li>● Command and General Staff meetings</li> </ul>	E, F		
<p><b>52.</b> Ensure planning staff completes or supports completion of other relevant plans within required time frames:</p> <ul style="list-style-type: none"> <li>● Contingency plan(s) as necessary, such as plans for evacuation/sheltering and structure protection</li> <li>● Demobilization plan</li> <li>● Transfer of command plan</li> </ul>	E, F, I		

**3i. Behavior: Develop and implement IAP**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>53.</b> Ensure that personnel complete and compile elements of the IAP within appropriate time frames:</p> <ul style="list-style-type: none"> <li>● Obtain elements from other relevant sections</li> <li>● Assemble the elements into an IAP</li> <li>● Ensure that the IAP links objectives with strategies and tactics</li> <li>● Obtain IAP information from all positions, contributing components, forms and data</li> <li>● Obtain the IC's approval and signature on IAP</li> <li>● Identify the number of IAP copies necessary</li> <li>● Check IAP content for completeness and accuracy</li> <li>● Ensure distribution of IAP copies</li> </ul>	E, F, I		
<p><b>54.</b> Execute forecasting for future operational periods and prepare reports.</p>	E, F, I		
<p><b>55.</b> Lead the completion of a situation report and distribute it to staff according to guidelines and procedures.</p>	E, F, I		
<p><b>56.</b> Ensure the creation of mapping products and visual aids with all facilities and other incident-related markers labeled:</p> <ul style="list-style-type: none"> <li>● Situation Unit map</li> <li>● IAP map</li> <li>● Operational briefing map</li> <li>● Transportation map</li> <li>● Facilities map</li> <li>● Progression map</li> <li>● Other incident-specific maps and charts</li> </ul>	E, F, I		

<p><b>57.</b> Establish and maintain the incident meeting schedule:</p> <ul style="list-style-type: none"> <li>● Publish and post the meeting schedule at appropriate locations</li> <li>● Distribute meeting schedule to IC, Command and General Staff and other appropriate personnel</li> <li>● Facilitate meetings and briefings during the planning cycle</li>   <li>● Monitor meeting and briefing times and locations</li> </ul>	<p>C, E, F, I</p>		
<p><b>58.</b> Monitor and evaluate the effectiveness of the planning cycle and suggest modifications when necessary:</p> <ul style="list-style-type: none"> <li>● Adjust meeting and briefing times and locations, as necessary</li> </ul>	<p>E, F, I</p>		

**4. Competency: Communicate effectively**

*Description:* Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a potentially rapidly changing environment.

**4a. Behavior: Ensure the exchange of relevant information during briefings**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>59.</b> Prepare for and participate in briefings: <ul style="list-style-type: none"> <li>● Ensure briefings are accurate, timely and include appropriate personnel</li> <li>● Brief external support organizations</li> <li>● Share and evaluate information</li> </ul>	E, F, I		
<b>60.</b> Lead staff briefings and debriefings.	E, F, I		

**5. Competency: Prepare for demobilization/transfer**

*Description:* Demobilize position and transfer position duties.

**5a. Behavior: Transfer position duties while ensuring continuity**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>61.</b> Complete the process for demobilizing position responsibilities:</p> <ul style="list-style-type: none"> <li>● Brief and provide complete and accurate records to relief personnel</li> <li>● Discuss equipment release considerations</li> <li>● Provide information to supervisor to assist with decisions on release priorities</li> <li>● Coordinate with appropriate partners regarding demobilization procedures</li> <li>● Brief personnel on demobilization responsibilities</li> <li>● Ensure personnel demobilize in a timely and complete manner</li> <li>● Emphasize safety and accountability during this phase of operations</li> </ul>	C, E, F, I, J, T		
<p><b>62.</b> Coordinate an efficient transfer of position duties when deactivating or demobilizing resources:</p> <ul style="list-style-type: none"> <li>● Inform assigned personnel</li> <li>● Notify incoming personnel when and where transition of positions will occur</li> <li>● Conduct transition effectively</li> <li>● Document follow-up action and submit to agency representative</li> </ul>	E, F, I		
<p><b>63.</b> Complete all necessary reports and narratives following common standards before turnover:</p> <ul style="list-style-type: none"> <li>● Activity log</li> <li>● Shift change</li> <li>● End of operational period</li> <li>● Reassignment</li> <li>● Deactivation/demobilization</li> </ul>	E, F, I		
<p><b>64.</b> Participate in transition or incident closeout:</p> <ul style="list-style-type: none"> <li>● Conduct debriefings with agency administrator(s) as requested</li> <li>● Close out incident as appropriate for the AHJ</li> </ul>	E, F, I		

**5b. Behavior: Plan for demobilization and ensure staff follow demobilization process**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>65.</b> Direct development of, support for, approval of and implementation of the demobilization plan:</p> <ul style="list-style-type: none"> <li>● Coordinate with appropriate partners regarding demobilization procedures</li> <li>● Coordinate needs and responsibilities</li> </ul>	E, F, I		

<p><b>66.</b> Coordinate with relevant entities to develop and implement the incident demobilization plan:</p> <ul style="list-style-type: none"> <li>● Consider demobilization early in the incident</li> <li>● Coordinate with Demobilization Unit and with Command and General Staff</li> <li>● Coordinate with local agencies concerning functional demobilization procedures</li> <li>● Brief staff on demobilization responsibilities</li> <li>● Ensure section demobilizes in a timely and complete manner</li> <li>● Emphasize safety and accountability during demobilization phase</li> </ul>	<p>E, F, I</p>		
<p><b>67.</b> Facilitate host agency administrator closeout/After Action Review (AAR).</p>	<p>E, F, I</p>		