

PLANNING SECTION CHIEF JOB AID

Overview

Position: Planning Section Chief

Personnel assigned to this position should have a good operational background and experience with the type of incident to which they are responding. Since this is a key position in the response organization, assignment should be based on experience level versus rank. Past experience as a Situation Unit Leader and/or Resource Unit Leader is highly desirable.

Section: Planning Section

Mission:

To provide the overall collection, evaluation and dissemination of all operational information concerning the incident in order to understand the current situation, predict incident course, and to assist in the preparation of response objectives and strategies. Key goals include:

- Make decisions on resource needs
 - Prepare an approved Incident Action Plan
-

Duties:

- ❑ Report to the Incident Commander for situation briefing and assist in preparation of initial response objectives and strategies.
- ❑ Establish information requirements and reporting schedules for all ICS organizational elements for operational periods, incident action plan preparation, and information dissemination.
- ❑ Invoke duties of unit leaders to undertake initial preparation of deployment of staff and resources.
- ❑ Determine need for specialists to undertake resource and site assessments, and arrange for contract services in consultation with chiefs of Logistics and Finance/administration Sections.
- ❑ Brief unit leaders on duties, safety, communications and other field requirements.
- ❑ Introduce any contract resource or oil spill specialists to response team and its organization.
- ❑ Represent the state on federal regional environmental emergency teams (REET) for exchanging resource information and setting protection priorities.
- ❑ Coordinate with other section chiefs on preparing established situation reports, status summaries, and Incident Action Plans for the next operational period.

Continued on Next Page

Overview (Cont'd)

References

Below is a list of references that may be required during the use of this job aid:

- Field Operations Guide (ICS OS-420-1)
- NIIMS I-440 Planning Section Chief Guide
- NFES Planning Section Position Manual (ICS 221-1)
- NIIMS Planning Section Chief Position Task Book (NFES 2331)
- Incident Command System (COMDTINST 3120.14)

Materials

Ensure that these materials are available to the Planning Section Chief during an incident, if not already provided in a unit or section specific support kit.

- | | |
|---|--|
| <input type="checkbox"/> ICS Forms Catalog | <input type="checkbox"/> In boxes or large envelopes |
| <input type="checkbox"/> Field Operations Guide | <input type="checkbox"/> Stapler |
| <input type="checkbox"/> Local charts and maps | <input type="checkbox"/> Push pins |
| <input type="checkbox"/> Rulers | <input type="checkbox"/> 3 or 6 part folders |
| <input type="checkbox"/> Mylar sheets | <input type="checkbox"/> 2 hole punch |
| <input type="checkbox"/> Felt tip pens | <input type="checkbox"/> Pre-printed Mtng Agendas |
| <input type="checkbox"/> Dry erase markers (wide and thin line) | <input type="checkbox"/> Stack pack |
| <input type="checkbox"/> Pencils (lead and grease) | <input type="checkbox"/> ICS forms on disk |
| <input type="checkbox"/> Paper, sticky notes | <input type="checkbox"/> Laptop computer with printer, software |
| <input type="checkbox"/> Scissors | <input type="checkbox"/> T Cards |
| | <input type="checkbox"/> Position Manuals for Planning Section positions |
| <input type="checkbox"/> Notebooks (some waterproof) | <input type="checkbox"/> ICS 215 (Operational Planning Worksheet) |
| <input type="checkbox"/> ICS 213 General Msg Forms | <input type="checkbox"/> Other IAP forms |
| <input type="checkbox"/> White out | <input type="checkbox"/> Intercom headsets for PSC and Unit Leaders |
| <input type="checkbox"/> Masking tape | |
| <input type="checkbox"/> Easel chart | <input type="checkbox"/> Copy enlarger/poster printer |

General Information

Use clear text and ICS terminology (no codes) in radio transmissions and address Incident Communications Center:

“(Incident Name) Communications”.

Initial Actions

General Tasks

Below are initial responsibilities for the Planning Section Chief.

STEP	ACTION	✓
1.	Receive assignment.	<input type="checkbox"/>
2.	Upon arrival at the incident, check-in at designated check-in locations. Check-in locations may be found at: <ul style="list-style-type: none">• Incident Command Post• Base or Camps• Staging Areas• Helibases	<input type="checkbox"/>
3.	Obtain an initial brief from Incident Commander (IC) <ul style="list-style-type: none">• Expectations of the IC• Incident objectives• Agencies/organizations/stakeholders involved• Incident activities/situation• Special concerns	<input type="checkbox"/>
4.	Obtain ICS 201 from IC if this is the initial assignment of a PSC. If this is a relief or transition assignment, then obtain IAP/briefing from the current PSC	<input type="checkbox"/>

Continued on Next Page

Initial Actions (Cont'd)

General Tasks (Cont'd)

Initial responsibilities for the Planning Section Chief are continued below.

STEP	ACTION	✓															
5.	Review ICS 201 (pages 1-4)	<input type="checkbox"/>															
	<table border="1"> <thead> <tr> <th>ICS 201 Section (page)</th> <th>Contains</th> <th>Consider</th> </tr> </thead> <tbody> <tr> <td>Map/sketch (page 1)</td> <td>Geographic scope of incident and layout of organization, divisions/groups, facilities, boundaries, resource locations</td> <td>Need for changes to geographic layout of organization</td> </tr> <tr> <td>Summary of current actions (page 2)</td> <td>Actions taken to date</td> <td>Any additional actions needed</td> </tr> <tr> <td>Current organization (page 3)</td> <td>Understanding of personnel assignments to date</td> <td>Adequacy of current organization to meet incident needs</td> </tr> <tr> <td>Resource summary (page 4)</td> <td>Resources on-scene and ordered in Resource location/status</td> <td>Need for resources in addition to those on scene/ordered in</td> </tr> </tbody> </table>	ICS 201 Section (page)	Contains	Consider	Map/sketch (page 1)	Geographic scope of incident and layout of organization, divisions/groups, facilities, boundaries, resource locations	Need for changes to geographic layout of organization	Summary of current actions (page 2)	Actions taken to date	Any additional actions needed	Current organization (page 3)	Understanding of personnel assignments to date	Adequacy of current organization to meet incident needs	Resource summary (page 4)	Resources on-scene and ordered in Resource location/status	Need for resources in addition to those on scene/ordered in	
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6.	Begin/maintain Unit Activity Log (ICS 214)	<input type="checkbox"/>															
7.	Acquire work materials listed on page 2	<input type="checkbox"/>															
8.	Complete forms and reports required of the assigned position and send these documents to Documentation Unit at end of each operational period	<input type="checkbox"/>															

Decision on Resource Needs

Assess Personnel Already Assigned to Incident Determine optimal assignments for Incident personnel.

STEP	ACTION	✓						
1.	<p>Determine assignments/status of personnel already on scene at incident</p> <table border="1" data-bbox="667 470 1227 953"> <thead> <tr> <th data-bbox="667 470 894 522">IF ICS 201</th> <th data-bbox="894 470 1227 522">THEN Determine from</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 522 894 690">Available</td> <td data-bbox="894 522 1227 690">ICS 201, page 3 (Current Organization) ICS 201, page 4 (Resources Summary)</td> </tr> <tr> <td data-bbox="667 690 894 953">NOT available</td> <td data-bbox="894 690 1227 953">Initial brief with IC Check-in List (ICS 211 or equivalent) Organization charts Personal observation/interview</td> </tr> </tbody> </table>	IF ICS 201	THEN Determine from	Available	ICS 201, page 3 (Current Organization) ICS 201, page 4 (Resources Summary)	NOT available	Initial brief with IC Check-in List (ICS 211 or equivalent) Organization charts Personal observation/interview	<input type="checkbox"/>
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Available	ICS 201, page 3 (Current Organization) ICS 201, page 4 (Resources Summary)							
NOT available	Initial brief with IC Check-in List (ICS 211 or equivalent) Organization charts Personal observation/interview							
2.	<p>Determine qualifications of assigned personnel</p> <table border="1" data-bbox="667 1037 1227 1696"> <thead> <tr> <th data-bbox="667 1037 894 1079">IF ICS 201</th> <th data-bbox="894 1037 1227 1079">THEN</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 1079 894 1383">Completed</td> <td data-bbox="894 1079 1227 1383">Check resources summary for qualifications NOTE: The ICS 201 does NOT currently require that this information be recorded</td> </tr> <tr> <td data-bbox="667 1383 894 1696">Not complete</td> <td data-bbox="894 1383 1227 1696">Look at alternative sources for information <ul style="list-style-type: none"> • Check-in List (ICS 211, Block 15) • Unit Watch Quarter and Station Bill • Personal interview/observation </td> </tr> </tbody> </table>	IF ICS 201	THEN	Completed	Check resources summary for qualifications NOTE: The ICS 201 does NOT currently require that this information be recorded	Not complete	Look at alternative sources for information <ul style="list-style-type: none"> • Check-in List (ICS 211, Block 15) • Unit Watch Quarter and Station Bill • Personal interview/observation 	<input type="checkbox"/>
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Completed	Check resources summary for qualifications NOTE: The ICS 201 does NOT currently require that this information be recorded							
Not complete	Look at alternative sources for information <ul style="list-style-type: none"> • Check-in List (ICS 211, Block 15) • Unit Watch Quarter and Station Bill • Personal interview/observation 							
3.	Assign on scene personnel to based on availability & qualifications as determined in Steps 1 and 2	<input type="checkbox"/>						

Decision on Resource Needs (Cont'd)

Activate Planning Section Units

Use the worksheet below to calculate staffing needs for the Planning Section.

STEP	ACTION	✓																																											
1.	<p>Determine the appropriate staffing for the Planning Section using the table below:</p> <p>NOTE: When ordering personnel for the Planning Section also consider the need for check-in recorders, field observers, and display processors.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2" style="text-align: center;">Position</th> <th colspan="3" style="text-align: center;">Size of Incident (Number of Divisions)</th> <th rowspan="2" style="text-align: center;">Number Needed</th> </tr> <tr> <th style="text-align: center;">2</th> <th style="text-align: center;">5</th> <th style="text-align: center;">10 or more</th> </tr> </thead> <tbody> <tr> <td>Planning Section Chief</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> </tr> <tr> <td>Deputy Planning Section Chief</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Resource Unit Leader</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> </tr> <tr> <td>Situation Unit Leader</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> </tr> <tr> <td>Documentation Unit Leader</td> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">1</td> <td style="text-align: center;">_____</td> </tr> <tr> <td>Demobilization Unit Leader</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> <td style="text-align: center;">1</td> <td style="text-align: center;">_____</td> </tr> <tr> <td colspan="4" style="text-align: right;">Total</td> <td style="text-align: center;">_____</td> </tr> </tbody> </table>	Position	Size of Incident (Number of Divisions)			Number Needed	2	5	10 or more	Planning Section Chief	1	1	1	1	Deputy Planning Section Chief	0	0	1	_____	Resource Unit Leader	1	1	1	1	Situation Unit Leader	1	1	1	1	Documentation Unit Leader	0	1	1	_____	Demobilization Unit Leader	0	0	1	_____	Total				_____	<input type="checkbox"/>
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Demobilization Unit Leader	0	0	1	_____																																									
Total				_____																																									
2.	Multiply the Total in Step 1 by (2) for 24 hour operations	_____																																											
3.	Subtract number of personnel already assigned to Planning Section	_____																																											
4.	Order remainder (number and qualifications) using ICS 213 (General Message Form); route to Logistics Section Chief	_____																																											

Decision on Resource Needs (Cont'd)

Conduct Section Briefing

The checklist below should be completed at the BEGINNING OF EACH OPERATIONAL PERIOD.

STEP	ACTION	✓
1.	Meet with Unit Leaders	<input type="checkbox"/>
2.	Discuss status of objectives from previous operational period	<input type="checkbox"/>
3.	Establish and post short-term objectives for upcoming operational period	<input type="checkbox"/>
4.	Provide feedback on Unit Leader performance	<input type="checkbox"/>
5.	Assess size of Planning Section and determine need to order/demobilize personnel	<input type="checkbox"/>
6.	Query Unit Leaders for problems or concerns to be addressed (personnel issues, training needs, etc.)	<input type="checkbox"/>

Assign Technical Specialists

Technical specialists need to be properly checked-in and assigned.

STEP	ACTION	✓						
1.	<p>When a technical specialist reports to the Planning Section, determine status and assign:</p> <table border="1"> <thead> <tr> <th>IF</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>Properly checked-in</td> <td>Assign to requestor Notify Resources Unit of status</td> </tr> <tr> <td>Not properly checked-in</td> <td>Record check-in information on ICS 211 Assign to requestor Notify Resources Unit of status</td> </tr> </tbody> </table> <p>NOTE: Track technical specialists and observe continued need for assignment during operational planning</p>	IF	THEN	Properly checked-in	Assign to requestor Notify Resources Unit of status	Not properly checked-in	Record check-in information on ICS 211 Assign to requestor Notify Resources Unit of status	<input type="checkbox"/>
IF	THEN							
Properly checked-in	Assign to requestor Notify Resources Unit of status							
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Incident Action Plan Prepared

Transition from ICS 201 to IAP

The Planning Section Chief is responsible for preparing the IAP.

STEP	ACTION	✓															
1.	<p>Determine (from Incident Commander) when the transition from ICS 201 to formal Incident Action Plan will occur:</p> <table border="1" data-bbox="652 558 1240 846"> <thead> <tr> <th colspan="2" data-bbox="652 558 951 646">This Operational Period</th> <th data-bbox="951 558 1240 646">Next Operational Period</th> </tr> </thead> <tbody> <tr> <td data-bbox="652 646 792 684"></td> <td data-bbox="792 646 951 684"></td> <td data-bbox="951 646 1240 684"></td> </tr> <tr> <td data-bbox="652 684 792 837">Updated Incident Briefing ICS 201</td> <td data-bbox="792 684 951 837">Updated Incident Briefing ICS 201</td> <td data-bbox="951 684 1240 837">Incident Action Plan</td> </tr> </tbody> </table> <table border="1" data-bbox="667 892 1227 1570"> <thead> <tr> <th data-bbox="667 892 894 940">IF</th> <th data-bbox="894 892 1227 940">THEN</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 940 894 1209">ICS 201</td> <td data-bbox="894 940 1227 1209"> Update ICS 201 for next operational period NOTE: The ICS 201 can be used as the IAP for as long as the IC determines that this is appropriate </td> </tr> <tr> <td data-bbox="667 1209 894 1570">Formal IAP</td> <td data-bbox="894 1209 1227 1570"> Determine from IC <ul style="list-style-type: none"> • Length of operational periods (12 or 24 hours commonly used) • Start times for operational periods • Deadline for completion of IAP </td> </tr> </tbody> </table>	This Operational Period		Next Operational Period				Updated Incident Briefing ICS 201	Updated Incident Briefing ICS 201	Incident Action Plan	IF	THEN	ICS 201	Update ICS 201 for next operational period NOTE: The ICS 201 can be used as the IAP for as long as the IC determines that this is appropriate	Formal IAP	Determine from IC <ul style="list-style-type: none"> • Length of operational periods (12 or 24 hours commonly used) • Start times for operational periods • Deadline for completion of IAP 	<input data-bbox="1295 443 1328 474" type="checkbox"/>
This Operational Period		Next Operational Period															
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IF	THEN																
ICS 201	Update ICS 201 for next operational period NOTE: The ICS 201 can be used as the IAP for as long as the IC determines that this is appropriate																
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Incident Action Plan Prepared (cont'd)

Transition from ICS 201 to IAP (Cont'd)

The checklist for preparing the IAP is continued below.

STEP	ACTION	✓												
2.	<p>Given the IAP completion deadline, and using the planning cycle illustrated below, work backwards to establish the IAP development schedule:</p> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">IF</th> <th style="width: 45%;">AND Event is</th> <th style="width: 30%;">THEN</th> </tr> </thead> <tbody> <tr> <td rowspan="4" style="text-align: center; vertical-align: middle;">Submission Deadline = X</td> <td>IC/UC command objectives</td> <td style="text-align: center;">X - 8</td> </tr> <tr> <td>Pre-planning meeting</td> <td style="text-align: center;">X - 6</td> </tr> <tr> <td>Planning meeting</td> <td style="text-align: center;">X - 3</td> </tr> <tr> <td>IAP preparation</td> <td style="text-align: center;">X - 2</td> </tr> </tbody> </table>	IF	AND Event is	THEN	Submission Deadline = X	IC/UC command objectives	X - 8	Pre-planning meeting	X - 6	Planning meeting	X - 3	IAP preparation	X - 2	<input type="checkbox"/>
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Submission Deadline = X	IC/UC command objectives	X - 8												
	Pre-planning meeting	X - 6												
	Planning meeting	X - 3												
	IAP preparation	X - 2												
<p>Note: This IAP development schedule should be used to negotiate the submission deadline for the first IAP. The PSC is responsible for ensuring the IC understands the development cycle and the time needed to produce the IAP.</p> <p>Note: These times are approximated for the first cycle and may vary significantly based on incident complexity and length of the operational period.</p>														

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Incident Action Plan Prepared (cont'd)

Facilitate Meetings The Planning Section Chief serves as the facilitator for several key meetings during each operational cycle.

STEP	ACTION	✓
1.	<p>Based on times determined in previous steps, instruct the Situation Unit Leader to prepare ICS 230 (Daily Meeting Schedule)</p> <p>NOTE: These are not the only meetings/events that need to be included on the ICS 230. Ensure the SUL also includes press briefs, VIP visits, IC updates, command staff meetings and other significant events during the operational period.</p>	<input type="checkbox"/>
2.	<p>Ensure completed ICS 230 is posted on Situation Status display and distributed to all Command Staff, Section Chiefs, Division/Group Supervisors and appropriate Unit Leaders</p>	<input type="checkbox"/>
3.	<p>15-30 minutes before meeting, send reminders to meeting attendees to ensure prompt attendance</p> <p>NOTE: This can be done via ICS 213, email, messenger, announcement, or any other method that is effective at getting the word out.</p>	<input type="checkbox"/>
4.	<p>At designated time, facilitate each meeting to maintain schedule, cover all required aspects, and produce expected deliverables. Ensure presenters are prepared to cover their portion of the meeting agenda. Determine the need for and ensure attendance of Technical Specialists if necessary.</p> <p>See IF/THEN table on the next pages</p> <p>NOTE: Agendas can be preprinted in ICS 231 (Meeting Description) and used for various meetings.</p>	<input type="checkbox"/>

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Incident Action Plan Prepared (cont'd)

Facilitate Meetings (cont'd) The meeting facilitation job aid continues below.

IF Meeting Is	THEN			
	Attendees Are	Agenda Is	Presenter Is	Deliverables Are
Pre-Planning (Tactics)	PSC OPS RUL LSC SO	Objectives for the next operational period (clearly stated and attainable with the resources available, yet flexible enough to allow OPS to choose tactics) Strategies (primary and alternatives) Prepare a draft of ICS 215 to identify resources that should be ordered through LSC. This process can be completed by OPS and RUL after the meeting adjourns, with RUL preparing an enlarged ICS 215 for the Planning Meeting	OPS OPS with PSC RUL	Primary strategies Alternative strategies Draft ICS 215 (Operational Planning Worksheet)
Planning	IC IO LO SO OPS PSC LSC FSC RUL SUL Air Ops Technical Specialists (as needed)	Incident objectives/policy issues Briefing of situation, critical and sensitive areas, weather/sea forecast, resource status/availability Primary and alternative strategies to meet objectives Designate Branch, Division, Group boundaries and functions as appropriate, using maps and ICS 215	IC/UC PSC with SUL, RUL OPS with PSC, LSC	

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Incident Action Plan Prepared (cont'd)

Facilitate Meetings (cont'd) The meeting facilitation job aid continues below.

IF Meeting Is	THEN			
	Attendees Are	Agenda Is	Person Tasked	Deliverables Are
Planning (cont'd)		Specify tactics for each Division; Note limitations	OPS with SUL	
		Specify resources needed by Division/Groups	OPS with PSC, LSC	
		Specify operations facilities and reporting locations – plot on map	OPS with LSC	
		Develop resources, support and overhead orders	PSC, LSC	
		Financial concerns/reports	FSC	
		Communications, traffic, safety, medical, and other support	LSC with PSC	
		Contributing organization/agency considerations regarding work plan	LO	
		Safety considerations regarding work plan	SO	
		Media considerations regarding work plan	IO	
		Finalize/approve ICS-215s for next operational period	IC/UC	Final ICS 215 Conceptual approval of IAP with input from all organizational elements

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Incident Action Plan Prepared (cont'd)

Facilitate Meetings (cont'd) The meeting facilitation job aid continues below.

IF Meeting Is	THEN			
	Attendees Are	Agenda Is	Person Tasked	Deliverables Are
IAP Prep NOTE: This is not a formal meeting – the tasking required to complete this step can be handed out immediately following the Planning Meeting	LSC	Establish deadlines for following:	RUL	ICS 202, ICS 203/207 ICS 204
	PSC	Incident Objectives (ICS 202)		
	OPS	Organization List/Chart (ICS 203 or 207)		
	RUL	Assignment List (ICS 204)	(w/OPS assist)	
	SUL	Communications Plan (ICS 205)	LSC	ICS 205/206
	SO	Medical Plan (ICS 206)		Traffic Plan
		Traffic Plan		Incident maps ICS-OS-209 ICS-OS-232
		Incident map	SUL	
		Operational Components (use as pertinent):		
		Air Operations Summary (ICS 220)	OPS	ICS 220
	Daily Safety Message	SO	Daily Safety Message	
	Demobilization Plan	PSC	Demobilization Plan	

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Incident Action Plan Prepared (cont'd)

Facilitate Meetings (cont'd) The meeting facilitation job aid continues below.

IF Meeting Is	THEN			
	Attendees Are	Agenda Is	Person Tasked	Deliverables Are
Ops (shift) Brief	IC	Current response actions and last shift's accomplishments	PSC	Convey IAP objectives and assignments to oncoming shift
	IO			
	LO			
	SO	Review of IC/UC objectives,	OPS	
	OPS			
	PSC	Review changes to IAP		
	LSC	Division/Group and air operations assignments	SUL	
	FSC			
	Div/Group Supervisors	Weather and sea conditions forecast	LSC	
	Task Force Leaders	Trajectory analysis		
	Strike Team Leaders	Transport, communications, supply updates	SO	
		Safety issues	FSC	
		Financial report	IO	
	Unit Leaders	Media report	LO	
	Contributing organization/ agency reports/concerns			

NOTE: If the incident is spread out over a large geographic area consider conducting the shift briefs in the vicinity of the actual work areas. The Division/Group Supervisors would carry out these shift briefs.

NOTE: Meeting occurs approximately 1 hour prior to start of each shift.

Incident Action Plan Prepared (cont'd)

Evaluate Alternative Strategies The Planning Section Chief is responsible for developing alternatives to proposed strategies.

STEP	ACTION	✓										
1.	Determine alternate plan(s) for each primary strategy proposed by OPS during the pre-planning meeting	<input type="checkbox"/>										
2.	<p>Determine if alternate plans are precluded by any policy, regulation or other incident specific constraint</p> <table border="1"> <thead> <tr> <th>IF Alternate Strategy</th> <th>AND</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>Not feasible</td> <td>————→</td> <td rowspan="2">Present only primary plan at planning meeting</td> </tr> <tr> <td rowspan="2">Feasible</td> <td>Precluded by constraints</td> </tr> <tr> <td>NOT precluded by constraints</td> <td>Present at planning meeting as alternative</td> </tr> </tbody> </table>	IF Alternate Strategy	AND	THEN	Not feasible	————→	Present only primary plan at planning meeting	Feasible	Precluded by constraints	NOT precluded by constraints	Present at planning meeting as alternative	<input type="checkbox"/>
IF Alternate Strategy	AND	THEN										
Not feasible	————→	Present only primary plan at planning meeting										
Feasible	Precluded by constraints											
	NOT precluded by constraints	Present at planning meeting as alternative										
3.	<p>For each alternative strategy determine:</p> <ul style="list-style-type: none"> • Resources needed to execute • Resource availability • Cost 	<input type="checkbox"/>										
4.	Be prepared to present and discuss pros/cons of alternate strategies at planning meeting	<input type="checkbox"/>										

Prepare the IAP

Use the checklist below to properly prepare and assemble the IAP.

STEP	ACTION	✓
1.	At conclusion of IAP prep meeting ensure assignments/expectations are clear	<input type="checkbox"/>
2.	Instruct those responsible for developing portions of the IAP to provide advance notice if deadlines will not be met	<input type="checkbox"/>

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Incident Action Plan Prepared (cont'd)

Prepare the IAP (cont'd)

The IAP preparation checklist is continued below.

STEP	ACTION	✓																																																								
3.	Ensure duplication services available/adequate	<input type="checkbox"/>																																																								
4.	Assemble forms for IAP	<input type="checkbox"/>																																																								
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Continued on Next Page

Incident Action Plan Prepared (cont'd)

Prepare the IAP (cont'd)

The IAP preparation checklist is continued below.

STEP	ACTION	✓
5.	Proofread IAP, ensure forms complete and signed by originator	<input type="checkbox"/>
6.	Present to IC/UC for final approval/signature	<input type="checkbox"/>
7.	Duplicate as needed	<input type="checkbox"/>
8.	Route signed original to DUL	<input type="checkbox"/>
9.	Have DUL distribute as needed	<input type="checkbox"/>

Assemble Task Forces and Strike Teams

Task Forces and Strike Teams are organizational tools that help the ICS effectively manage large groups of response personnel.

STEP	ACTION	✓						
1.	<table border="1"> <thead> <tr> <th>IF Need is for</th> <th>THEN Assemble as</th> </tr> </thead> <tbody> <tr> <td>Group of resources with same type/kind</td> <td>Strike Team</td> </tr> <tr> <td>Group of resources with different type/kind</td> <td>Task Force</td> </tr> </tbody> </table> <p>NOTE: Task Forces are much more common in Coast Guard operations</p>	IF Need is for	THEN Assemble as	Group of resources with same type/kind	Strike Team	Group of resources with different type/kind	Task Force	<input type="checkbox"/>
IF Need is for	THEN Assemble as							
Group of resources with same type/kind	Strike Team							
Group of resources with different type/kind	Task Force							
2.	Identify and group appropriate resources	<input type="checkbox"/>						
3.	Assign a Task Force/Strike Team Leader	<input type="checkbox"/>						
4.	Provide Task Force/Strike Team with Comms	<input type="checkbox"/>						
5.	Designate assembly area/time	<input type="checkbox"/>						
6.	Assign via ICS 204	<input type="checkbox"/>						
7.	Have RUL track grouped resources as Task Force/Strike Team	<input type="checkbox"/>						

Approved Incident Action Plan

Order Appropriate Resources

In order to ensure the availability of resources for operations beyond the next operational period, the Planning Section Chief must work closely with the Operations Section Chief to anticipate resource needs.

NOTE: Pre-planning and planning meetings will produce a list of resources required for the chosen objectives, strategies and tactics during the next operational period.

STEP	ACTION	✓											
1.	<table border="1"> <thead> <tr> <th data-bbox="667 684 857 835">IF Anticipated Operation Will Occur</th> <th data-bbox="857 684 1036 835">AND They</th> <th data-bbox="1036 684 1227 835">THEN</th> </tr> </thead> <tbody> <tr> <td data-bbox="667 835 857 987">During next operational period</td> <td data-bbox="857 835 1036 987">→</td> <td data-bbox="1036 835 1227 987">Resource needs covered by ICS 215</td> </tr> <tr> <td data-bbox="667 987 857 1205" rowspan="2">Beyond next operational period</td> <td data-bbox="857 987 1036 1205">Are similar in scope and complexity to current operation</td> <td data-bbox="1036 987 1227 1205">Resources are likely to already be on scene</td> </tr> <tr> <td data-bbox="857 1205 1036 1491">Go beyond scope and complexity of current operations</td> <td data-bbox="1036 1205 1227 1491">PSC and OPS should ID resources needed to conduct anticipated operations</td> </tr> </tbody> </table>	IF Anticipated Operation Will Occur	AND They	THEN	During next operational period	→	Resource needs covered by ICS 215	Beyond next operational period	Are similar in scope and complexity to current operation	Resources are likely to already be on scene	Go beyond scope and complexity of current operations	PSC and OPS should ID resources needed to conduct anticipated operations	<input type="checkbox"/>
IF Anticipated Operation Will Occur	AND They	THEN											
During next operational period	→	Resource needs covered by ICS 215											
Beyond next operational period	Are similar in scope and complexity to current operation	Resources are likely to already be on scene											
	Go beyond scope and complexity of current operations	PSC and OPS should ID resources needed to conduct anticipated operations											
2.	Order necessary resources to arrive in time for anticipated operations.	<input type="checkbox"/>											

Approved Incident Action Plan (cont'd)

Advise Command & General Staff The Planning Section Chief is responsible for keeping the IC/UC staff informed about incident status changes.

STEP	ACTION	✓									
1.	Identify changes in incident status from field reports	<input type="checkbox"/>									
2.	Determine if changes are significant: <table border="1" data-bbox="667 569 1230 1125"> <thead> <tr> <th>IF Status Change</th> <th>THEN Change</th> <th>Brief</th> </tr> </thead> <tbody> <tr> <td>Does not require a change in operational period objectives/strategies</td> <td>Probably not significant</td> <td>At next planning meeting</td> </tr> <tr> <td>May require change in operational period objectives/strategies</td> <td>Significant</td> <td>Immediately</td> </tr> </tbody> </table>	IF Status Change	THEN Change	Brief	Does not require a change in operational period objectives/strategies	Probably not significant	At next planning meeting	May require change in operational period objectives/strategies	Significant	Immediately	<input type="checkbox"/>
IF Status Change	THEN Change	Brief									
Does not require a change in operational period objectives/strategies	Probably not significant	At next planning meeting									
May require change in operational period objectives/strategies	Significant	Immediately									
3.	Notify command and general staff of ALL significant changes NOTE: Make notifications via quickest method (radio, phone, fax, messenger)	<input type="checkbox"/>									

Provide Status Reports to Requesters

The Planning Section may be tasked to provide specific information regarding the incident to various requestors.

STEP	ACTION	✓
1.	Receive request for incident information	<input type="checkbox"/>

Continued on Next Page

Approved Incident Action Plan (cont'd)

Provide Status Reports to Requesters (cont'd)

The checklist used to provide information to various requestors is continued below.

STEP	ACTION	✓						
2.	Determine if information is available via the Situation Unit	<input type="checkbox"/>						
	<table border="1"> <thead> <tr> <th>IF Situation Unit</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>Maintains information</td> <td>Task SUL to provide</td> </tr> <tr> <td>Does NOT have requested information</td> <td> 1. Determine best source 2. Obtain information/task source to provide </td> </tr> </tbody> </table>	IF Situation Unit	THEN	Maintains information	Task SUL to provide	Does NOT have requested information	1. Determine best source 2. Obtain information/task source to provide	
IF Situation Unit	THEN							
Maintains information	Task SUL to provide							
Does NOT have requested information	1. Determine best source 2. Obtain information/task source to provide							

Recommend Release of Resources

From early in the incident response, the Planning Section Chief must be alert for excess resources that can be reassigned or demobilized.

STEP	ACTION	✓						
1.	Identify excess resources via ICS 215 process or feedback from the field. NOTE: If resource is a Task Force or Strike Team, disassemble into single resources before proceeding to Step 2	<input type="checkbox"/>						
2.	Determine if resources are needed elsewhere at the incident	<input type="checkbox"/>						
	<table border="1"> <thead> <tr> <th>IF Resources</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>Needed elsewhere at incident</td> <td>PSC and OPS reassign and notify RUL of status change</td> </tr> <tr> <td>Not needed at incident</td> <td>Place on list of resources proposed for demobilization</td> </tr> </tbody> </table>	IF Resources	THEN	Needed elsewhere at incident	PSC and OPS reassign and notify RUL of status change	Not needed at incident	Place on list of resources proposed for demobilization	
IF Resources	THEN							
Needed elsewhere at incident	PSC and OPS reassign and notify RUL of status change							
Not needed at incident	Place on list of resources proposed for demobilization							
3.	Present list of resources proposed for demobilization to IC/UC	<input type="checkbox"/>						

Continued on Next Page

Approved Incident Action Plan (cont'd)

Recommend Release of Resources (Cont'd)

The checklist used to demobilize excess resources is continued below.

STEP	ACTION	✓						
4.	Demobilize resources that IC/UC approves for release	<input type="checkbox"/>						
	<table border="1"> <thead> <tr> <th>IF Resource</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>Approved for demobilization</td> <td>Demobilize in accordance with approved demobilization plan</td> </tr> <tr> <td>Not approved for demobilization</td> <td>Determine reason Keep at incident Notify RUL of status</td> </tr> </tbody> </table>	IF Resource	THEN	Approved for demobilization	Demobilize in accordance with approved demobilization plan	Not approved for demobilization	Determine reason Keep at incident Notify RUL of status	
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Develop General Plan

The General Plan is used to generate a proposed timeline for the overall response. It can be used to make resource decisions, estimate costs for the response and manage expectations both in and outside of the response organization.

STEP	ACTION	✓								
1.	Estimate time-frame for response	<input type="checkbox"/>								
2.	Determine if General Plan is feasible									
	<table border="1"> <thead> <tr> <th>IF Response Time-Frame Is</th> <th>THEN General Plan Is</th> </tr> </thead> <tbody> <tr> <td>7 days or less</td> <td>Not feasible</td> </tr> <tr> <td>8-14 days</td> <td>Can be used</td> </tr> <tr> <td>More than 14 days</td> <td>Should be used</td> </tr> </tbody> </table>	IF Response Time-Frame Is	THEN General Plan Is	7 days or less	Not feasible	8-14 days	Can be used	More than 14 days	Should be used	
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7 days or less	Not feasible									
8-14 days	Can be used									
More than 14 days	Should be used									
3.	Develop General Plan if indicated by the above or required by IC/UC	<input type="checkbox"/>								

Continued on Next Page

Approved Incident Action Plan (cont'd)

Develop General Plan (cont'd)

The checklist for developing the General Plan is continued below.

STEP	ACTION	✓
4.	Assign a Detailed Incident Assessment Team (DIAT) to assemble information needed for the General Plan NOTE: This team is typically made up of representatives from operations and planning that have incident specific experience	<input type="checkbox"/>
5.	Draft the General Plan in accordance with the instructions in the ICS Forms Catalog	<input type="checkbox"/>
6.	Submit to IC/UC for approval	<input type="checkbox"/>
7.	Distribute copies of approved plan to IC/UC, Command and General Staff	<input type="checkbox"/>
8.	Have DIAT update plan every 3-4 days, resubmit for approval, and distribute	<input type="checkbox"/>

Section/Unit Demobilized Tasks

Below are demobilization responsibilities applicable to supervisory personnel assigned to this section/unit.

STEP	ACTION	✓
1.	Provide input to the Demobilization Unit Leader who develops the Demob Plan	<input type="checkbox"/>
2.	Brief subordinates regarding demobilization	<input type="checkbox"/>
3.	Debrief appropriate personnel prior to departing incident <ul style="list-style-type: none"> • Incident Commander • Logistics Section Chief 	<input type="checkbox"/>
4.	Supervise demobilization of section, including storage of supplies	<input type="checkbox"/>
5.	Provide Supply Unit Leader with a list of supplies to be replenished	<input type="checkbox"/>
6.	Forward all Section Unit documentation to Documentation Unit	<input type="checkbox"/>
7.	Complete Check-out Sheet	<input type="checkbox"/>

Information Exchange Matrix

Information Exchange Matrix

Inputs/Outputs Below is an input/output matrix to assist the Planning Section Chief in exchanging information with other ICS positions.

MEET With	WHEN	PSC OBTAINS	PSC PROVIDES
Incident Commander	Initial incident brief	ICS 201 or verbal brief on incident status	Feedback on initial response activity/organization
	During initial response phase	Operational Periods Deadline for initial IAP submission	Feedback on operational period and IAP deadline Feedback on objectives
	Planning meeting	IC/UC objectives Restatement of response objectives	Proposed IAP Briefing on situation, critical/sensitive areas, resource status/availability, weather
	IAP approval process	Approved IAP	IAP for approval
Safety Officer	Planning meeting	Concerns regarding safety issues in IAP	Proposed IAP Briefing on situation, critical/sensitive areas, resource status/availability, weather
	IAP prep process	Safety messages	Feedback on safety messages Update on response operations
Liaison Officer	Planning meeting	Concerns regarding liaison issues	Proposed IAP Briefing on situation, critical/sensitive areas, resource status/availability, weather
Information Officer	During initial response phase Planning meetings	Estimated time of press briefings Media concerns considerations	Completed ICS 230 (Meeting Schedule) Proposed IAP Briefing on situation, critical/sensitive areas, resource status/availability, weather

Continued on Next Page

Information Exchange Matrix (continued)

MEET With	WHEN	PSC OBTAINS	PSC PROVIDES
Operations Section Chief	Pre-planning meeting Planning meeting IAP prep meeting	Strategy/tactics Resource needs Primary/alternative strategies Branch/Division and Group boundaries/functions Tactics Resource needs Ops facilities Information to complete ICS 204's ICS 220 (Air Operations Summary)	Input on alternative strategies Proposed IAP Briefing on situation, critical/sensitive areas, resource status/availability, weather Completed ICS 204's Feedback on IAP submissions
Logistics Section Chief	During initial response phase Planning meeting IAP prep	Confirmation of staffing order Feedback on resource availability Facility details Support plan input ICS 205 ICS 206 Support plans (Traffic Plan)	ICS 213 with resource order to staff Planning Section Proposed IAP Briefing on situation, critical/sensitive areas, resource status/availability, weather Feedback on IAP submissions
Finance/ Administration Section Chief	Planning meeting Shift brief	Update on finance concerns Financial Report	Proposed IAP Briefing on situation, critical/sensitive areas, resource status/availability, weather Review of IC/UC objectives
Technical Specialists	As they report in	Check-in information	Assignment Brief on incident status

