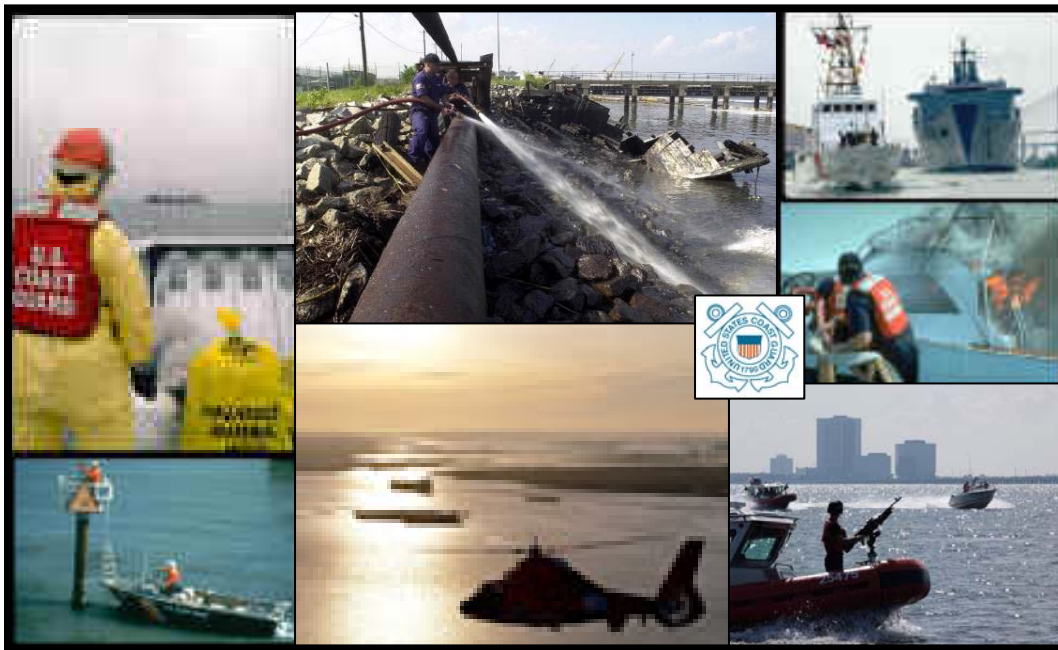# U. S. Coast Guard

National Incident Management System (NIMS)

Incident Command System (ICS)

PLANNING SECTION CHIEF TYPE 3 (PSC3)

Performance Qualification Standard

November 2008

U.S. COAST GUARD CERTIFICATION LETTER

RECOMMENDATION/CERTIFICATION OF COMPLETED PERFORMANCE QUALIFICATION STANDARD (PQS) FOR THE POSITION OF   **TYPE 3 PLANNING SECTION CHIEF (PSC3))**
FINAL VERIFYING OFFICER'S RECOMMENDATION   I verify that _____ has completed all requirements necessary to perform the duties in this position, has passed a unit level oral board and should therefore be considered for certification in this position.
FINAL VERIFYING OFFICER'S SIGNATURE AND DATE
FINAL VERIFYING OFFICER'S PRINTED NAME, TITLE, DUTY STATION, AND PHONE NUMBER
U. S. COAST GUARD CERTIFICATION   Note: The Certifying Official is the local unit Commanding Officer (O-4 or above) for Type 3 and Type 4 positions. See page 3 below for more information.   I certify that_____ has met all requirements for qualification in this position and that such qualification has been issued. You are authorized to carry out the responsibilities of this position within the scope of your qualification.   This Letter of Certification should be retained as part of your personal Training Record.   **THIS CERTIFICATION IS GOOD FOR FIVE YEARS FROM DATE OF ISSUE.**
CERTIFYING OFFICIAL'S SIGNATURE AND DATE
CERTIFYING OFFICIAL'S PRINTED NAME, TITLE, DUTY STATION AND PHONE NUMBER

U.S. Coast Guard
Performance Qualification Standard (PQS) for
Type 3 Planning Section Chief (PSC3)
Qualification Code: ICS-PSC3

This booklet is one section of your personal on-the-job training (OJT) manual and the Performance Qualification Standard (PQS) for the position noted above. It is your guide to qualification. It is your responsibility to document completed unit training items.

When you have completed all of the items required for this qualification, your command will issue a Letter of Certification (example on page 2) and your Unit Training Coordinator will record and certify your qualification in the Training Management Tool (TMT).

For additional information concerning background, objectives, guidance, components, responsibilities and explanation as to the use of the NIMS ICS PQS Workbooks, see the USCG All-Hazard NIMS ICS Performance Qualification Standard (PQS) Guide. The Guide can be found in the ICS Library on Homeport (Http://homeport.uscg.mil/ click on library tab, click on ICS tab).

RESPONSIBILITIES:

1. The Commanding Officer is responsible for:
- Selecting trainees based on the needs of the unit.
- Providing opportunities for evaluation and/or making the trainee available for evaluation.

2. The Individual is responsible for:
- Reviewing and understanding instructions in the PQS Workbook.
- Providing background information to an Verifying Officer.
- Completing all tasks for an assigned position within three years. All tasks with an approval older than three years must be reevaluated.
- Assuring the Evaluation Record is complete.
- Notifying local unit personnel when the PQS Workbook is completed and providing a copy to the unit Training Officer.
- Keeping the original PQS Workbook in personal records.

3. The Verifying Officer is responsible for:
- Being certified in the competencies for which they are to verify and must be command (unit) designated.
- Entering their title, name, and initials in the Record of Verifying Officers section before making entries in the workbook.
- Being experienced and qualified personnel who have demonstrated the ability to evaluate, instruct, and observe other personnel in the performance task criteria.
- Meeting with the trainee and determining past experience, current qualifications, and desired objectives/goals.

- 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.
- Observing successful performance of each task and document such with date and initials in the appropriate space provided in this booklet. It may be necessary to perform a task several times.
- Accurately evaluating and recording demonstrated performance of tasks on both the task and Evaluation Record. Dating and initialing completion of the task and documenting incident/event performance on an evaluation record shall document satisfactory performance. Each task must be signed off individually (e.g. initialing the first and last task with a line down the page will NOT be acceptable). Unsatisfactory performance shall also be documented in the Evaluation Record. The Verifying Officer will not give credit for any task that is not performed satisfactory.
- Completing the Evaluation Record found at the end of each PQS Workbook for each incident/event/exercise performance.

4. The Final Verifying Officer is responsible for:
- Being qualified and proficient in the position being evaluated.
- Reviewing the trainee's record to ensure completeness.
- Scheduling and conducting a final qualification interview/board for the member for the desired position.
- Signing the verification statement on page 2 of the PQS Workbook when all tasks have been initialed and the oral board has been passed.
- Ensuring that all tasks have been completed within the three years prior to submission for final approval. Any task with an approval older than three years must be reevaluated and brought up to date.

5. The Training Officer or Designee of the member's/employee's home unit is responsible for:
- Issuing PQS Workbooks to document task performance.
- Explaining to the trainee the purpose and processes of the PQS Workbook as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Identifying incident evaluation opportunities.
- Identifying and assigning an Verifying Officer that can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance.
- Conducting progress reviews.
- Conducting a closeout interview with the trainee and Verifying Officer and assuring that documentation is proper and complete.
- Ensuring course completions and other PQS tasks and certifications are entered into the Training Management Tool (TMT) system.

6. The <u>Certifying Official</u> is responsible for:
- Determining certification by reviewing the trainees PQS Workbook to ensure all tasks and course prerequisites have been completed.
- Issuing proof of certification by signing a certification letter.
- Ensuring certification/qualification is entered into the Training Management Tool (TMT) system. Each task in the PQS includes the TMT task code right after the number of the task for finding and entry into TMT.

PLANNING SECTION CHIEF TYPE 3 (PSC3)

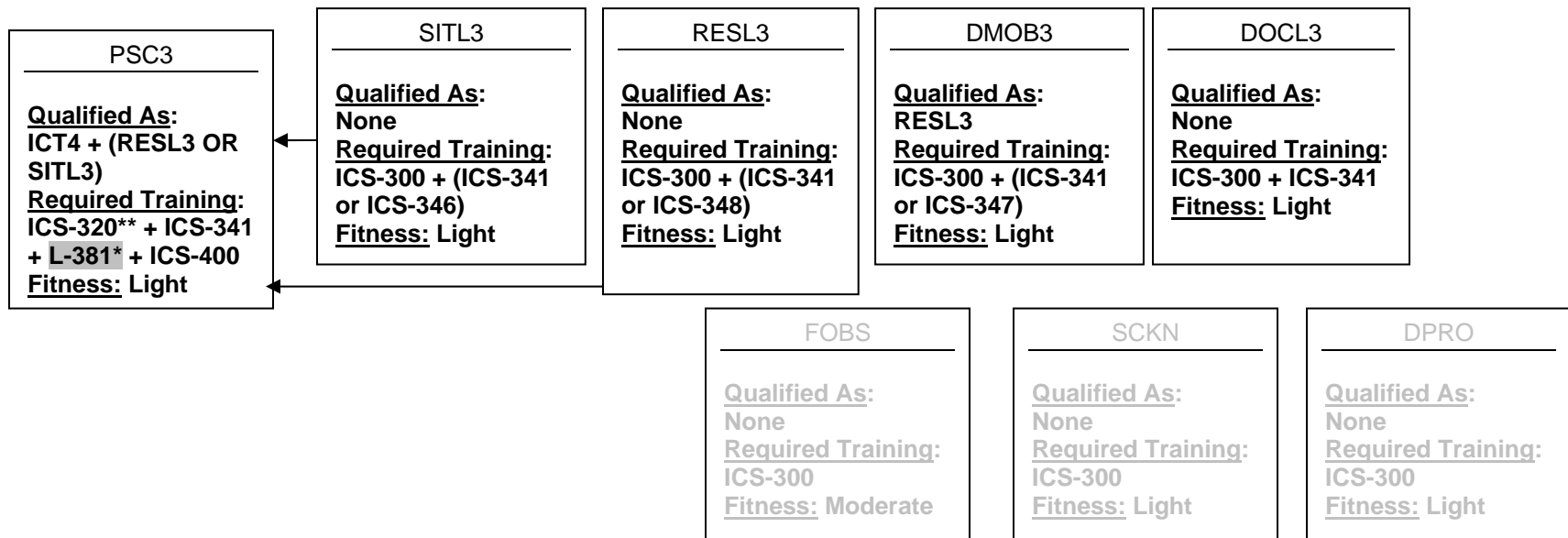|	
REQUIRED TRAINING	ICS-300 and ICS-400 and ICS-341 IRPW and ICS-320 Intermediate IMT and L-381* or L-481* Incident Leadership Principles
PREREQUISITE	Satisfactory Completion of the PQS for PSC3 and Satisfactory performance/certification as an ICT4 and RESL3 or SITL3
TARGET PERSONNEL	Response and Prevention Dept Personnel and Planning Div personnel; Incident Management Assist Team Deputy Planning Section Chief; Joint Field Office (JFO) and Principle Federal Official (PFO), Deployable Operations Group and any other personnel filling Planning section roles in response
CERTIFYING OFFICIAL	Unit CO (O-4 and above)
FITNESS STANDARD	Light
CURRENCY	5 years
CURRENCY REQUIREMENTS	<u>Every Year</u>: Complete online ICS-305 Intermediate ICS Refresher or Sat performance as an PSC3 in an actual incident/event, drill/exercise using ICS <u>Every 5 years</u>: Satisfactory performance as an PSC3 in an actual incident/event, drill/exercise using ICS
OTHER POSITION ASSIGNMENTS THAT WILL MAINTAIN CURRENCY	ICT3, SITL2, RESL2, PSC2

RECORD OF VERIFYING OFFICERS				
Date	**Title**	**Verifying Officer's Name**	**ICS Qual**	**Initials**

RECORD OF COMPLETION		
Training Prerequisites	**Date**	**Verifying Officer's Signature**
A. Completion of Training Courses: 1. ICS-400 Advanced ICS Course		
2. ICS-341 IRPW Course		
3. L-381 or L-481* Incident Leadership (waived until available)		
B. ICS Qualification Prerequisites 1. Type 4 Incident Commander (ICT4)		
2. Type 3 Situation Unit Leader (SITL3) or Type 3 Resources Unit Leader (RESL3)		
C. Completion of PQS Workbook		
D. Successful completion of unit level oral board.		
E. Qualification/Certification Letter (page 2) submitted for approval.		
F. Qualification certification entered into TMT		

ICS Position Qualification Flow Chart for PSC3

This chart is <u>NOT</u> an Incident Command System organization chart. This chart shows the Type 3 progression from one ICS position to another within the qualification system. Each box within the chart contains information pertaining to the position. Job Titles are listed as abbreviations for the position. Please see Homeport ICS library for a list of NIMS ICS Position Abbreviations/Mnemonics. The PQS Qualification Guide has more information about position qualification process and guidance.

- <u>Job Title</u> (Position Abbreviation),
- <u>Required Qualification(s)/Certification(s)</u>. Position qualification referenced by Position Abbreviation,
- <u>Required Training</u> course(s) for qualification in this position (does not include perquisites for positions in required experience) which is noted in individual PQS workbooks
- <u>Fitness:</u> Recommended fitness requirements for each ICS position. Categories: Arduous, Moderate, Light, or None.

PSC3	SITL3	RESL3	DMOB3	DOCL3
Qualified As: **ICT4 + (RESL3 OR SITL3)** **Required Training:** **ICS-320** + ICS-341 + L-381* + ICS-400** **Fitness: Light**	**Qualified As:** **None** **Required Training:** **ICS-300 + (ICS-341 or ICS-346)** **Fitness: Light**	**Qualified As:** **None** **Required Training:** **ICS-300 + (ICS-341 or ICS-348)** **Fitness: Light**	**Qualified As:** **RESL3** **Required Training:** **ICS-300 + (ICS-341 or ICS-347)** **Fitness: Light**	**Qualified As:** **None** **Required Training:** **ICS-300 + ICS-341** **Fitness: Light**

FOBS	SCKN	DPRO
Qualified As: **None** **Required Training:** **ICS-300** **Fitness: Moderate**	**Qualified As:** **None** **Required Training:** **ICS-300** **Fitness: Light**	**Qualified As:** **None** **Required Training:** **ICS-300** **Fitness: Light**

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

Task Codes: Each task has a code associated with the type of training assignment where the task may be completed. These include: O = other, I = incident/event and R = rare event. Definitions for these codes may be found below*. While tasks can be performed in any situation, they must be evaluated on the specific type of incident/event for which they are coded. Tasks coded I must be evaluated on an incident/event, and so on. Performance of any task on other than the designated assignment is not valid for qualification. **If more than one code is listed, the task may be completed on any of the listed situations (e.g. If code I, O2 and O3 are listed, the task may be completed on any of the three listed).**

*Code:
- O   = Task can be completed in a variety of situations, such as in a classroom, exercise or simulation, incident or event, or daily job.
- O1 = Task must be performed on a Full Scale Exercise with equipment deployment which is managed under the Incident Command System (ICS). Examples of exercises that may employ ICS include oil spill, search and rescue, hazardous material response, and fire.
- O2 = Task must be performed on an Exercise which is managed under the Incident Command System (ICS). Examples of exercises that may employ ICS include oil spill, search and rescue, hazardous material response, and fire.
- O3 = Training or Daily Job environment that tests knowledge/skills associated with the task.
- O4 = ICS course classroom environment that tests knowledge/skills associated with the task.
- I   = Task must be performed on an incident or event which is managed under the Incident Command System (ICS). Examples of incidents and events that may employ ICS include oil spill, search and rescue, hazardous material response, fire, and emergency or non-emergency (planned or unplanned) events.
- R   = Rare events seldom occur and opportunities to evaluate Trainee performance in real settings are limited. Examples of rare events include accidents, injuries, vehicle and aircraft crashes. Through interviews, the Verifying Officer may be able to determine if the Trainee could perform the task in a real situation.

Competency 1: Assume position responsibilities.
Description: Successfully assume role of Planning Section Chief and initiate position activities at the appropriate time according to the following behaviors.

Behavior: Ensure readiness for assignment.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
1. ICS-GEN-01. Obtain and assemble information and materials needed for appropriate deployment kits. • Personal kit • Unit Leader / Section Chief kit. • See list in PSC aid job	O		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
2. ICS-T3-SC-01. Ensure availability of Planning Section staff.	O		
3. ICS-T3-PSC-03. Identify units with the section to be activated and evaluate staffing requirements. • Other agency personnel. • Technical specialist needs	O		
4. ICS-T3-SC-02. Prepare and submit initial resource request (ICS-213RR) for staffing.	O		
5. ICS-T3-PSC-05. Ensure meeting location is well organized and required resources in place prior to meetings. • See PSC Job aid for meeting layout. • Poster-sized ICS 215 and ICS 215A. • Large maps/charts of incident. • Turn charts and markers. • Agenda.	O		

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
6. ICS-T3-SC-04. Collect information from outgoing Planning Section Chief or other personnel responsible for incident prior to arrival. • Status of incident and assigned resources • Status of existing Planning Section	I O2 O3		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task

7. ICS-T3-SC-03. Obtain initial briefing from immediate supervisor and/or Incident Commander.
• Incident information
  - ICS 201, Incident Briefing
  - ICS 202, Incident Objectives
  - IAP
  - Situation Analysis, Implementation Plan, or Contingency Plan
  - Copy of the most recent ICS 209, Incident Status Summary
  - Map/charts(s) of the incident.
• Organizational structure (unified command or single organization)
• Special considerations on the incident
• Current national situation
• Resources assigned, enroute, and on order
• Facilities established and operating
• Anticipated incident duration, size, and type Copies of current Resource Requests (ICS 213RR-CG), Forms and resources committed to incident
• Key contact list with phone and fax numbers
	O		

8. ICS-T3-SC-05. Attend Command and General Staff meeting and obtain briefing from Incident Commander. • Incident Commander's priorities, goals, and objectives for IMT and the incident • Instructions concerning the tasks expected of the Operations Section • Expected timeframes for briefings, planning meetings, and team meetings	O		

Behavior: Establish effective relationships with relevant personnel.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
9. ICS-T3-SC-06. Establish and maintain positive interpersonal and interagency working relationships. • Federal, State, Local agencies, private industry, non-government organizations and tribal leaders. • Hosting unit • Command and general staff	O		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
10. ICS-T3-SC-07. Create a work environment that provides mutual respect and equal opportunity for all personnel assigned to the incident.	O		

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
11. ICS-T3-PSC-11. Plan and activate section. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role**.	O		
• Identify units within the section to be activated and request resources for section operation. • Identify work space requirements and determine locations. • Brief unit leaders on current and anticipated activity. • Provide initial operating instructions to section personnel.	I O2 O3		
12. ICS-T3-PSC-12. Determine Technical Specialist requirements and maintain awareness of their status. • Direct Technical Specialists assigned to the Planning Section.	I O2 O3		

Behavior: Understand and comply with ICS concepts and principles.

TASK	CODE	EVAL RECORD #	Verifying Officer: Initial & date upon completion of task
13. ICS-T3-SC-08. Maintain appropriate span of control.	O		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	CODE	EVAL RECORD #	Verifying Officer: Initial & date upon completion of task
14. ICS-T3-SC-09. Demonstrate knowledge of NIMS ICS Concepts and Principles. • Chain of Command • Unity of Command • ICS forms • ICS terminology • Operational Planning process • Span of Control • Resource management • Scope, roles, responsibilities, jurisdiction, and authority	O		

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: Model leadership values and principles.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
15. ICS-GEN-11. Exhibit principles of devotion to duty. • Be proficient in your job, both technically and as a leader. • Make sound and timely decisions. • Ensure tasks are understood, supervised and accomplished. • Develop your subordinates for the future.	O		
16. ICS-GEN-12. Exhibit principles of respect. • Know your subordinates and look out for their well-being. • Keep your subordinates informed. • Build the team. • Employ your subordinates in accordance with their capabilities.	O		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
17. ICS-GEN-13. Exhibit principles of honor and integrity. • Know yourself and seek improvement. • Seek responsibility and accept responsibility for your actions. • Set the example.	O		

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
18. ICS-T3-SC-11. Recognize potentially hazardous situations and ensure assigned personnel follow safety guidelines appropriately. • Site Safety Plan (ICS-208) • GAR Model • Safety messages • Work/rest guidelines.	I O1 O3		

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
19. ICS-T3-SC-12. Manage operational periods to achieve objectives. • Evaluate need to adjust operational periods or work shifts and make appropriate recommendations to IC. • Ensure adequate work/rest ratio.	I O1 O3		
20. ICS-T3-SC-13. Ensure subordinates understand assignment for operational period and for meetings.	O		
21. ICS-T3-PSC-21. Demonstrate knowledge of duties of a Situation Unit Leader.	O		
22. ICS-T3-PSC-22. Demonstrate knowledge of duties of a Resources Unit Leader.	O		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
23. ICS-T3-PSC-23. Demonstrate knowledge of duties of a Demobilization Unit Leader.	O		
24. ICS-T3-PSC-24. Demonstrate knowledge of duties of a Documentation Unit Leader.	O		
25. ICS-T3-PSC-25. Demonstrate knowledge of duties of a Environmental Unit Leader.	O		
26. ICS-T3-PSC-26. Demonstrate knowledge of duties of a Marine Transportation System Recovery Unit Leader.	O		
27. ICS-T3-SC-14. Continuously evaluate performance. • Communicate performance standards. • Communicate if deficiencies found immediately and take corrective action. • Provide training opportunities where available. • Provide feedback to personnel according to guidelines (ICS-225).	O		

Behavior: Coordinate interdependent activities.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
28. ICS-T3-PSC-28. Interact and coordinate with command staff, general staff and appropriate unit leaders. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role.**	I O2 O4		
• Receive and transmit current and accurate information. • Communicate changes to the Incident Action Plan (IAP) or relevant plans. • Ensure the Resources Unit Leader is advised of changes in status of resources assigned to the operation. Keep status current.	I O2		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

Behavior: Emphasize teamwork.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
29. ICS-GEN-17. Establish cohesiveness among assigned personnel.	O		

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: Ensure relevant information is exchanged during briefings and debriefings.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
30. ICS-T3-PSC-30. Facilitate the Command and General Staff meeting. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420, or 440) can only be done once, must be during class exercise, and must have filled the PSC role.**	I O1 O4		
• As per the Incident Management Handbook, perform PSC role in the Command and General Staff meeting.	I O1		
31. ICS-T3-PSC-31. Facilitate the Tactics meeting. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role.**	I O1 O4		
• As per the Incident Management Handbook, perform PSC role in the tactics meeting.	I O1		
32. ICS-T3-PSC-32. Facilitate the Planning meeting. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role.**	I O1 O4		
• As per the Incident Management Handbook, perform PSC role in the planning meeting.	I O1		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
33. ICS-T3-PSC-33. Facilitate the Operations briefing. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role**. • As per the Incident Management Handbook, perform PSC role in the operations briefing	I O1 O4		
	I O1		
34. ICS-T3-PSC-34. Participate in debrief of off going ops personnel to evluate IAP effectiveness. **This task must be completed at two different incidents/events or exercises.**	I O1		
35. ICS-T3-SC-18. Participate in briefings and debriefings. • Hotwash • Lessons learned • After Action Reporting (AAR) • VIP visits	I O1		

Behavior: Ensure documentation is complete and disposition is appropriate.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
36. ICS-T3-PSC-36. Review and verify Incident Status Summary (ICS 209). • Accurate and complete • Priorities and special considerations • Within established timeframes	O		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

37. ICS-T3-PSC-37. Ensure incident documentation is completed as required by the Incident Commander. **This task must be completed at two different incidents/events or exercises.** • Incident Action Plan • Unit Log (ICS 214) • Incident Status Summary (ICS 209) • Personnel and equipment time records (CG 5136) to Time Unit Leader for each operational period • Resource Requests (ICS-213RR). • Open Action Tracking Worksheet (ICS-233) • Performance evaluations (ICS-225) for Planning Section staff when demobilized.	I O2		

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
38. ICS-T3-PSC-38. Publish, distribute, and post daily meeting schedule (ICS-230).	O		
39. ICS-T3-PSC-39. Inform identified attendees of meeting/briefing times, locations, and information expected of them. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role.** • Define meeting/briefing objectives, agenda, and time expectations (IMH Chapter 3). • Post agenda at appropriate locations.	I O2 O4 I O2		
40. ICS-T3-PSC-40. Review draft IAP for completeness and submit to Incident Commander for approval. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420 or 440) can only be done once, must be during class exercise.**	I O2 O4 I O2		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
41. ICS-T3-PSC-41. Ensure distribution of copies of IAP at the operational briefing.	O		
42. ICS-T3-SC-19. Prepare Transition Brief.	O		
43. ICS-T3-PSC-43. Update Incident Commander on current accomplishments and/or problems.	O		

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
44. ICS-T3-PSC-44. Ensure presenters at meetings and briefings are aware of and adhere to responsibilities. • Command and General Staff meeting • Objectives Meeting • Tactics meeting • Planning meeting • Operational briefing	O		
45. ICS-T3-PSC-45. planning staff has specific assignments and responsibilities to support the incident. • Division of duties • Work parameters	O		
46. ICS-T3-PSC-46. Evaluate and share incident information as appropriate within the chain of command and across functional areas.	O		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
47. ICS-T3-PSC-47. Ensure planning staff completes and compiles required elements of the IAP within required timeframes. **This task must be completed at two different incidents/events or exercises. Classroom environment (341, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role.**	I O2 O4		
• Obtain elements from other appropriate sections. • Assemble the elements into an IAP. • Ensure the IAP links management and control objectives with strategies and tactics. • Obtain the Incident Commander's approval and signature on IAP. • Identify how many copies of IAP are needed.	I O2		
48. ICS-T3-PSC-48. Develop and implement a plan for transfer of command if IC's change. • Contains accurate assessment of the situation. • Identify incident needs. • Include date and time of transition and transfer of command. • Complete transition of functional duties in a timely, smooth, and efficient manner. • Facilitate transfer of command meeting. • Brief subordinates.	O R		
49. ICS-T3-PSC-49. Ensure planning staff completes or supports completion of other relevant plans within required timeframes. • Evacuation plan • Salvage plan • Lightering plan • Dive plan • Decontamination plan • Transfer of command plan • Contingency plan(s) as needed (evacuation/sheltering, protection)	I O2 O3		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
50. ICS-T3-SC-21. Apply agency policy, priorities, limitations and constraints, and political and environmental considerations when reviewing and developing plans. • Strategic plans • IAP or other relevant plans • Cost containment	O		
51. ICS-T3-PSC-51. Ensure work/rest guidelines and length of assignments are monitored and followed.	O		
52. ICS-T3-SC-20. Ensure release priorities address contractual requirements. • Coordinate with Finance/Administration	I O R		

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
53. ICS-T3-PSC-53. Evaluate and monitor current situation to determine if present plan of action will meet incident objectives. **This task must be completed twice.** • Use technical specialists, operations personnel, and/or agency personnel. • Advise command and general staff of significant changes in incident status in a timely manner.	I O2		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

Behavior: Take appropriate action based on assessed risks.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
54. ICS-T3-PSC-54. Ensure the Risk Management Process is established and maintained.	O		

Behavior: Modify approach based on evaluation of incident situation.

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
55. ICS-T3-PSC-55. Draft/review and revise incident objectives for the Incident Commander. **This task must be completed at two different incidents/events or exercises. Classroom environment (341 or 440) can only be done once, must be during class exercise.**	I O		
	I O2 O3		
56. ICS-T3-PSC-56. Monitor incident status and develop alternative plans, strategies and tactics as necessary.	O		
57. ICS-T3-PSC-57. Revise planning cycle when appropriate. • Meeting time and location • Recommend revised operational periods as needed	O		

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

TASK	CODE	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
58. ICS-T3-SC-22. Anticipate demobilization of personnel and equipment. • Identify excess personnel and equipment. • Prepare schedule for demobilization	I O3		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	C O D E	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
59. ICS-T3-PSC-59. Obtain objectives, priorities, schedules, and constraints for the incident demobilization plan. • Consult with Operations Section Chief, Resource Unit Leader, Agency representatives/Liaison Officer, and Logistics Section Chief. • Draft release priorities. • Develop a mutually acceptable format for exchange of demobilization information with expanded dispatch. • Collect demobilization guidelines from agencies and/or coordination center (e.g. work, rest, communication, and travel guidance). • Contact section chiefs and unit leaders to obtain incident level direction (e.g. debriefs, lessons learned, evaluations, equipment turn in, medical checkout, CISM…).	I O2 O3		
60. ICS-T3-PSC-60. Prepare incident demobilization plan within established time frames. • General information section • Responsibility section • Release section • Release procedure section • Travel information section • Emergency demobilization section	I O2 O3		
61. ICS-T3-PSC-61. Obtain approval of the Incident Demobilization Plan from the IC.	I O2 O3		
62. ICS-T3-PSC-62. Distribute final version of Incident Demobilization Plan. • Provide copies to command and general staff and agency dispatch for comment and approval. • Distribute final copies to command and general staff, appropriate unit leaders, agency representatives, agency dispatch and others who assist in implementation of plan.	I O2 O3		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

TASK	C O D E	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
63. ICS-T3-PSC-63. Implement demobilization plan. • Ensure realistic release priorities. • Address agency, cooperating/assisting agency and incident requirements. • Minimize contract, transportation, and personnel costs. • Ensure incident and agency demobilization safety and travel procedures are followed.	I O2		

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

TASK	C O D E	EVAL RECORD #	VERIFYING OFFICER: Initial & date upon completion of task
64. ICS-T3-SC-24. Coordinate relief process. • Consider transition early in the incident. • Inform assigned resources and command staff. • Awareness of incident complexity (escalation/de-escalation) and impact on Planning Section. • Document follow-up action needed and submit to supervisor.	I O2 O3		

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

INSTRUCTIONS FOR COMPLETING THE EVALUATON RECORD

These evaluations may be made on incidents, simulations in classroom, or in daily duties, depending on what the position task book dictates (as per the CODE column for each task). This evaluation should be sufficient for qualification in the position if the individual is adequately prepared. Two blank evaluation forms are provided. If the additional evaluations are needed, a page can be copied from a blank ICS PQS workbook and attached.

Complete These Items a the START of the Evaluation Period:
- Evaluation Record #: the number in the upper right corner of the evaluation record identifies a particular incident/events/exercises or group of incidents/events/exercises. This number should be placed in the column labeled "EVAL RECORD #" on the PQS Workbook for each task performed satisfactorily. This number will enable reviews of the completed PQS Workbook to ascertain the qualifications of the different Verifying Officers prior to making the appropriate sign-off on the PQS Workbook.
- Trainee Information
  - Name, ICS position performed on the incident/event/exercise, Unit Name and Address
- Verifying Officer Information
  - Name, ICS position performed on the incident/event/exercise, Unit Name and Address

Complete These Items at the END of the Evaluation Period:
- Incident/Event/Exercise Information
  - Incident/Event/Exercise Name
  - Reference Number (if any) for Incident/Event/Exercise
  - Duration: include inclusive dates during which the trainee was evaluated. This block may indicate a span of time covering several small and similar incidents if the trainee has been evaluated on that basis, e.g. several initial response incidents.
  - Incident Kind: Search and Rescue, Oil Spill, Hazmat, Flood, Simulation/Exercise, Event, Other (specify)
  - Location (include Geographic Area, Agency, and State): Identify the location where the tasks were performed.
  - Management Type: Type 5, Type 4, Type 3, Type 2, Type 1, Area Command
  - Number, Types, and Kinds of Resources assigned to incident: enter the number of resources and types assigned to the incident pertinent to the trainees PQS Workbook.
- Verifying Officer's Recommendation.
  - Recommendation: Initial one line as appropriate and/or make comments regarding the future needs for the development of this trainee.
  - Signature
  - Initials: to authenticate recommendations and to allow for comparison with initials on the PQS Workbook
  - Verifying Officer's Relevant Qualification (or agency certification) – relevant to the trainee position supervised.

Evaluation Record # _____

Trainee Information

Printed Name:

Trainee ICS Position on Incident/Event/Exercise:

Home Unit/Agency:

Home Unit /Agency Address and Phone Number:

Verifying Officer Information

Printed Name:

Verifying Officer ICS Position on Incident/Event/Exercise:

Home Unit/Agency:

Home Unit /Agency Address and Phone Number:

Incident/Event/Exercise Information

Incident/Event/Exercise Name: Reference (Incident Number):

Duration (Enter inclusive dates during which the trainee was evaluated):

Incident Kind: Search and Rescue, Oil Spill, Hazmat, Flood, Simulation/Exercise, Event, Other (specify):

Location (include Geographic Area, Agency, and State):

Management Type (circle one): Type 5, Type 4, Type 3, Type 2, Type 1, Area Command

Number, Types, and Kinds of Resources assigned to incident:

Verifying Officer's Recommendation
(Initial only one line as appropriate)

_____ 1) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. The trainee has successfully performed all tasks in the PQS for the position. The trainee is ready for a final qualification board.

_____ 2) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. However, opportunities were not available for all tasks (or all uncompleted tasks) to be performed and evaluated on this assignment. An additional assignment is needed to complete the evaluation.

_____ 3) The trainee did not complete certain tasks in the PQS in a satisfactory manner and additional training, guidance, or experience is recommended.

_____ 4) The individual is severely deficient in the performance of tasks in the PQS for the position and additional training, guidance, or experience is recommended prior to another training assignment.

Record additional remarks/recommendations on an Individual Performance Evaluation (ICS-225), on reverse or by attaching an additional sheet to the evaluation record.

Verifying Officer's Signature: _____ Verifying Officer's Initials: _____ Date: _____

Verifying Officer's Relevant Qualification (or agency certification): _____

Duplicate this form as needed to document trainee experience

Evaluation Record # _____

Trainee Information

Printed Name:

Trainee ICS Position on Incident/Event/Exercise:

Home Unit/Agency:

Home Unit /Agency Address and Phone Number:

Verifying Officer Information

Printed Name:

Verifying Officer ICS Position on Incident/Event/Exercise:

Home Unit/Agency:

Home Unit /Agency Address and Phone Number:

Incident/Event/Exercise Information

Incident/Event/Exercise Name: Reference (Incident Number):

Duration (Enter inclusive dates during which the trainee was evaluated):

Incident Kind: Search and Rescue, Oil Spill, Hazmat, Flood, Simulation/Exercise, Event, Other (specify):

Location (include Geographic Area, Agency, and State):

Management Type (circle one): Type 5, Type 4, Type 3, Type 2, Type 1, Area Command

Number, Types, and Kinds of Resources assigned to incident:

Verifying Officer's Recommendation
(Initial only one line as appropriate)

_____ 1) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. The trainee has successfully performed all tasks in the PQS for the position. The trainee is ready for a final qualification board.

_____ 2) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. However, opportunities were not available for all tasks (or all uncompleted tasks) to be performed and evaluated on this assignment. An additional assignment is needed to complete the evaluation.

_____ 3) The trainee did not complete certain tasks in the PQS in a satisfactory manner and additional training, guidance, or experience is recommended.

_____ 4) The individual is severely deficient in the performance of tasks in the PQS for the position and additional training, guidance, or experience is recommended prior to another training assignment.

Record additional remarks/recommendations on an Individual Performance Evaluation (ICS-225), on reverse or by attaching an additional sheet to the evaluation record.

Verifying Officer's Signature: _____ Verifying Officer's Initials: _____ Date: _____

Verifying Officer's Relevant Qualification (or agency certification): _____

Duplicate this form as needed to document trainee experience