



**FEMA**

POSITION TASK BOOK FOR THE POSITION OF

**ALL-HAZARDS NATIONAL INCIDENT  
MANAGEMENT SYSTEM (NIMS)  
PLANNING SECTION CHIEF (TYPE 3)**

## PLANNING SECTION CHIEF (TYPE 3)

### 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: Obtain information relevant to position assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Obtain and review necessary documentation: <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>	E, F, I		
2. Receive briefing from the Incident Commander (IC) or outgoing Planning Section Chief: <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>	E, F, I		

#### 1b. Behavior: Establish or determine organizational structure, resource and staffing needs

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Evaluate staffing needs required to manage the section: <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>	E, F, I		

4. Organize meeting and briefing locations and ensure that necessary materials are available: <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>	E, F, I		
5. Utilize section personnel: <ul style="list-style-type: none"> <li>● Establish appropriate organization and assign roles and responsibilities, while maintaining span of control</li> </ul>	E, F, I		
6. Work closely with Operations Section personnel to identify kind, type and number of resources required to achieve section objectives: <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>	E, F, I		
7. Work closely with the Safety Officer to identify safety issues and materials for inclusion in plans.	E, F, I		

**1c. Behavior: Ensure readiness for assignment**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
8. Arrive properly equipped at designated time and location and check in according to agency/organization guidelines: <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		
9. Obtain complete incident and logistical information: <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		
10. Obtain, assemble and prepare information and materials for go-kit. The kit should contain critical items for the assignment and be easily transportable: <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		

## 2. 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.

### 2a. Behavior: Ensure the exchange of relevant information during briefings

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
11. Lead staff briefings and debriefings.	E, F, I		
12. 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		

### 3. Competency: Lead assigned personnel

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

#### 3a. Behavior: Model leadership values and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>13.</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>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		
<b>15.</b> Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
<b>16.</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		

#### 3b. Behavior: Communicate incident priorities and supervise personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>17.</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>18.</b> Ensure debriefings occur and participate as necessary: <ul style="list-style-type: none"> <li>● Ensure incident situation status information is current and complete</li> </ul>	E, F, I		
<b>19.</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>20.</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		
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**3c. Behavior: Ensure the health, safety, welfare and accountability of assigned personnel**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<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> 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>23.</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>24.</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		

**3d. 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>25.</b> Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access.</p>	E, F, I, J		
<p><b>26.</b> Demonstrate the ability to identify opportunities for universal accessibility.</p>	E, F, I, J		
<p><b>27.</b> Provide equal access, disability accommodations and access and functional needs (AFN) accommodations.</p>	E, F, I, J		

#### 4. 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.

##### 4a. Behavior: Set the section priorities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
28. Analyze work assignments and staffing levels to ensure achievement of section objectives.	E, F, I		
29. 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		
30. Disseminate priorities and expected completion timelines to staff.	E, F, I		
31. Hold staff accountable for communicated priorities and deadlines.	E, F, I		

##### 4b. Behavior: Develop and implement plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
32. 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		
33. 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		
34. Coordinate with Command and General Staff to identify the need for contingency plans: <ul style="list-style-type: none"> <li>● Severe weather</li> <li>● "Incident within an incident"</li> <li>● Evacuation</li> </ul>	C, E, F, I, J		
35. 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>36.</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		
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**4c. Behavior: Coordinate with all appropriate personnel and stakeholders**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>37.</b> Establish effective relationships and coordinate with incident personnel: <ul style="list-style-type: none"> <li>● IMT personnel</li> <li>● Other supporting personnel</li> </ul>	E, F, I		
<b>38.</b> Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s).	E, F, I		

**4d. Behavior: Apply agency policy, contracts and agreements**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>39.</b> Complete all work according to organization/agency direction, policy and incident objectives: <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>	E, F, I		
<b>40.</b> Demonstrate knowledge of and apply relevant legal, regulatory and fiscal constraints.	E, F, I		

**4e. 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>41.</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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**4f. Behavior: Ensure documentation is complete**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>42.</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		
<p><b>43.</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>44.</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>45.</b> Review documents for accuracy, timeliness and appropriate distribution.</p>	E, F, I		

**4g. Behavior: Establish work assignments and performance expectations, monitor performance and provide feedback**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

<p><b>46.</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>47.</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>48.</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>49.</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		

#### **4h. Behavior: Facilitate planning process**

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<p><b>50.</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		

<b>51.</b> Ensure presenters understand and adhere to their roles and responsibilities during meetings and briefings: <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		
<b>52.</b> Facilitate planning meetings and share pertinent information: <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		
<b>53.</b> Inform identified attendees of planning meeting time, location and information expected of them: <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		
<b>54.</b> Schedule and facilitate operational briefings: <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		

#### **4i. Behavior: Develop and implement IAP**

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>55.</b> Ensure that personnel complete and compile elements of the IAP within appropriate time frames: <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		
<b>56.</b> Ensure the creation of mapping products and visual aids with all facilities and other incident-related markers labeled: <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		
<b>57.</b> Establish and maintain the incident meeting schedule: <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>	C, E, F, I		
<b>58.</b> Execute forecasting for future operational periods and prepare reports.	E, F, I		

<b>59.</b> Lead the completion of a situation report and distribute it to staff according to guidelines and procedures.	E, F, I		
<b>60.</b> Monitor and evaluate the effectiveness of the planning cycle and suggest modifications when necessary: <ul style="list-style-type: none"><li>● Adjust meeting and briefing times and locations, as necessary</li></ul>	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
<b>61.</b> Complete all necessary reports and narratives following common standards before turnover: <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		
<b>62.</b> Complete the process for demobilizing position responsibilities: <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		
<b>63.</b> Coordinate an efficient transfer of position duties when deactivating or demobilizing resources: <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		
<b>64.</b> Participate in transition or incident closeout: <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> 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>	E, F, I		
<p><b>66.</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>67.</b> Facilitate host agency administrator closeout/After Action Review (AAR).</p>	E, F, I		