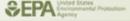


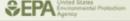
Instructor Introduction PSC

- Name / job title / Region / Special Team
- Years of Planning Section Chief-related experience?
- Recent or major incident involvement?

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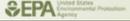
Administration PSC

- ▶ Student Registration Card
- ▶ Student Evaluation Form
- ▶ Course Agenda
- ▶ Student Manual – available for download
- ▶ Student Handouts

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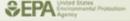
Facility Information PSC

- ▶ Parking
- ▶ Classroom
- ▶ Restrooms
- ▶ Water fountains, snacks, refreshments
- ▶ Lunch
- ▶ Emergency telephone numbers
- ▶ Alarms and emergency exits

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Resources PSC

- ▶ PSC Curriculum Website
 - response.epa.gov/institute
- ▶ Planning Section Toolbox
 - response.epa.gov/planningsection
- ▶ EPA ICS Forms Website
 - [response.epa.gov/ICS FORMS](http://response.epa.gov/ICS_FORMS)
- ▶ NIT Representative: John Martin, R6

ICS INSTITUTE  7

For Starters PSC

- ▶ Introductions:
 - Your Name?
 - What do you normally do (title)?
 - Where are you from?
 - Planning Section/ICS Experience?
 - Participant at the Shuttle, WTC, Capitol Hill Anthrax, Katrina/Rita, BP Spill Response, Enbridge, etc.?

ICS INSTITUTE  8

Administrative Details PSC

- ▶ Two formal breaks, plus lunch (conference scheduled)
- ▶ Restrooms are?
- ▶ Coffee is?
- ▶ Please take phone calls outside
- ▶ The only stupid question is the one that isn't asked
- ▶ The Agenda is proposed - we will vary to make sure all concerns are taken care of

ICS INSTITUTE  9

Expectations Exercise PSC

In Groups:

- ▶ Write down your expectations of the course
 - What do you want to walk away with?
- ▶ Use flip chart paper
- ▶ Pick a representative to present group's list to the class

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Course Objective PSC

Upon completion of this course the trainee will demonstrate through practical exercises and quizzes the knowledge and skills necessary to perform the duties and responsibilities of the Planning Section Chief in the Incident Command System (ICS).

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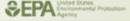
Course Overview PSC

- ▶ EPA-focused, DHS-compliant curriculum
- ▶ Homework assignments - develop your own customized Toolkit
- ▶ Practical Exercises - improve meeting facilitation skills
- ▶ Illustrative videos
- ▶ Five Unit Quizzes
 - Minimum average score of 70 percent on unit quizzes is required to receive a course completion certificate

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Course Overview - cont PSC

- ▶ Final Exercise
 - On Friday, March 24th, all participants will participate in a capstone final exercise
 - You and some of your fellow-students will be assigned to perform your KLP function on one of 8 Incident Management Teams
 - It will be scenario-based and last about 7 hours
 - Coaches will be provided
 - More details will be provided as the week progresses

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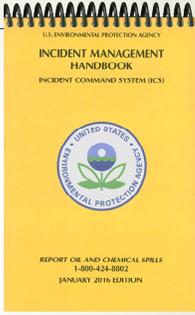
PSC Course Agenda - 2017 PSC

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Tactics Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
- ▶ Facilitating a Planning Meeting
- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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U.S. EPA ICS Guidance PSC

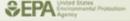
- ▶ U.S. EPA Incident Management Handbook (IMH)
- ▶ U.S. EPA position-specific Job Aid



ICS INSTITUTE  15

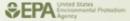
Terminology PSC

- ▶ We will be using "proper" ICS terminology in the class, including acronyms
- ▶ Exception: "OSC" will refer to an On-Scene Coordinator; Operations Section Chief will be "OPS" (IMH Glossary & Acronyms, pp. 22-20 through 22-27.)
- ▶ Catch us if you can
- ▶ We will remind you without being a pain

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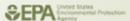
PSC Course Agenda - 2017 PSC

- ▶ Introduction (you are here)
- ▶ **ICS Overview**
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Trainees Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
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- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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ICS Etiquette for PSCs PSC

- ▶ Cell phones off in meetings
 - Cell phone ring = \$1 in PSC CISM jar
- ▶ Meetings start on time
 - Lombardi time: If you show up on-time you are 5 minutes late)
- ▶ IMT takes on personality of PSC
 - RS DRA in 2007
- ▶ Meetings end within 20-30 min...crisp meetings
- ▶ **Green, Yellow, Red...**
- ▶ Be prepared for meetings (know IMH & Job Aid)
- ▶ When speaking, stick to the point
- ▶ Present traditional ICS concepts (USFS) ...EPA evolution

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Origins of the Incident Command System

PSC

- ▶ 1970s – Recognition of the need for a standardized system of disaster response
- ▶ USDA Forest Service (USFS) tasked as lead agency to develop a better system
- ▶ 1980s – ICS adapted for all-hazard emergency and disaster response
- ▶ Now utilized for all emergency / disaster response in the US, and introduced to other countries



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Incident Command System

PSC

On-scene management tool that allows responders to adopt an integrated organizational structure equal to the complexity and demands of any single incident or multiple incidents without being hindered by jurisdictional boundaries

Features

- ▶ Standardized management concept
- ▶ Integrated organizational structure
- ▶ No jurisdictional boundaries
- ▶ Integrated communication and planning
- ▶ Manageable span of control



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National Incident Management System (NIMS)

PSC

- ▶ Presidential Directive that mandates use of the National Incident Management System (NIMS)
- ▶ Establishes a single, comprehensive, and common national approach to domestic incident management, used by all levels of government



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Examples of US Incidents Using ICS

- ▶ Exxon Valdez oil spill – 1989
- ▶ Hurricane Iniki, Hawaii – 1992
- ▶ Northridge earthquake – 1993
- ▶ Oklahoma City bombing – 1995
- ▶ World Trade Organization riots – Seattle 1999
- ▶ Pentagon, World Trade Center terrorist attack – 2001

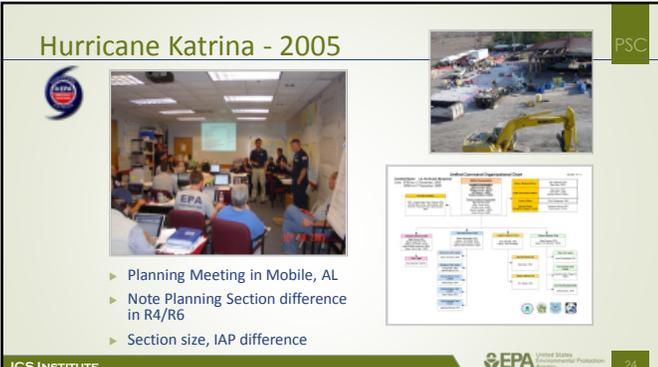
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Columbia Shuttle Response - 2003



The slide features four images: the EPA Emergency Response logo, a Columbia shuttle with '40' on its side, a map of Texas with county boundaries, and a photograph of a large tire on a road. The footer includes 'ICS INSTITUTE', 'EPA', and the number '23'.

Hurricane Katrina - 2005



The slide includes three images: the EPA logo, a photograph of a meeting in progress, and a photograph of a flooded area with a yellow excavator. Below the images is a list of bullet points and a screenshot of a planning document. The footer contains 'ICS INSTITUTE', 'EPA', and the number '24'.

- ▶ Planning Meeting in Mobile, AL
- ▶ Note Planning Section difference in R4/R6
- ▶ Section size, IAP difference

SONS 07

June 2007, Springfield, MA

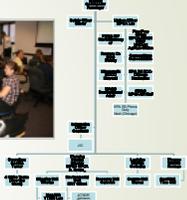


Planning Meeting

- ▶ Planning Meeting evolution... Objectives, Agenda, Maps

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Republican National Convention
September 2008, Minneapolis, MN



- ▶ ICS used to manage 75 EPA responders

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Civil Rights Game Pre-Deployment
June 2009, Cincinnati, OH



- ▶ ICS used to manage local and state responders

Ops Briefings @ shift change

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BP Spill Response
2010, Regions 4 and 6

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- ▶ ICS used to manage 27,000 responders
- ▶ ICP = 1,500 people

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Enbridge Pipeline Response
August 2010, Marshall, MI

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- ▶ ICS used to manage 2,000 local, state, and federal responders
- ▶ Ops Briefing at Marshall, MI

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Mid-Valley Pipeline Response
March 2014, Cincinnati, OH

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- ▶ ICS used to manage 200 local, state, and federal responders
- ▶ 50,000 gal spill
- ▶ Planning Meeting at Mid-Valley Pipeline Spill (2014) in Cincinnati, OH

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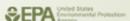
Duke Energy Oil Spill Response August 2014, Cincinnati, OH

PSC





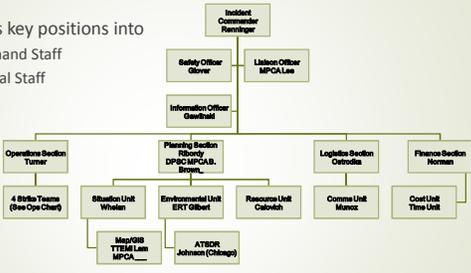
- ▶ ICS used to manage 110 local, state, and federal responders.
- ▶ 10,000 gal spill
- ▶ Planning Meeting at Duke Energy Oil Spill (2014) in Cincinnati, OH

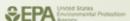
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The System

PSC

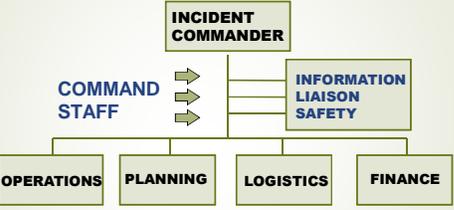
- ▶ Divides key positions into
 - Command Staff
 - General Staff

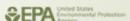


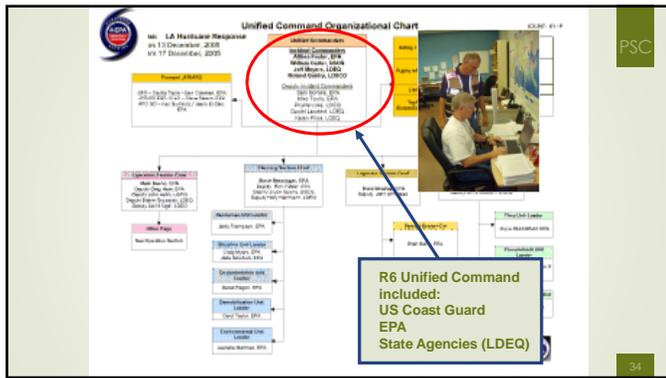
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The Command Staff

PSC



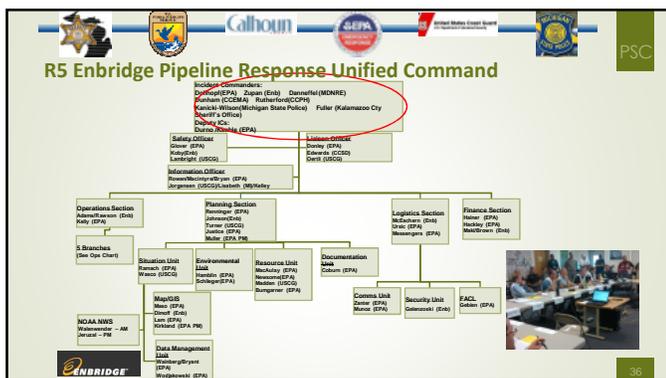
ICS INSTITUTE  33

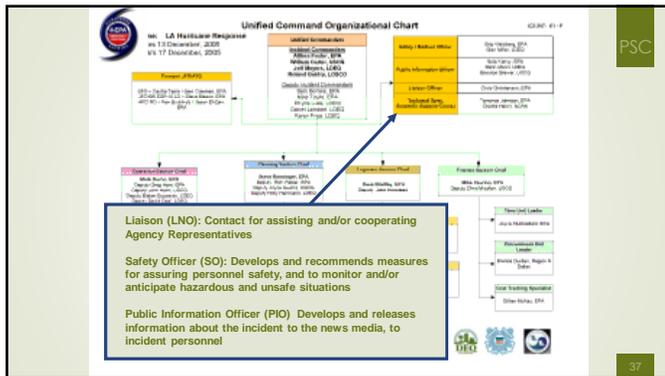


ESF-10 Unified Command Hurricane Katrina 2005 – EPA Region 4

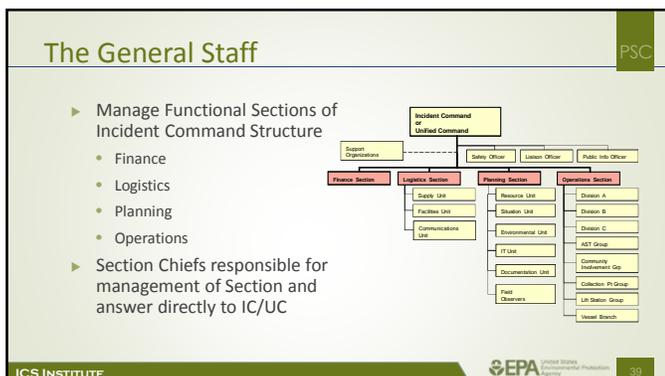
- UC Member Organizations
 - U.S. Environmental Protection Agency
 - U.S. Coast Guard (USCG)
 - Alabama Department of Environmental Management (ADEM)
 - Mississippi Department of Environmental Quality (MDEQ)

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Unified Command Organizational Chart

MO: LA Hazardous Response
 on 13 December 2005
 EA 17 (Revised), 2005

Operations Section: Directs tactical operations and carries out the plan

40

Operational Divisions September 02 – 06, 2005
 Divisions based on State boundaries

41

Operations Section: R4 Katrina

Over the course of the response, the Operations Section undertook numerous activities to achieve Region 4's assigned missions:

- ▶ Assessment and Recovery
- ▶ Above Ground Storage Tanks (AST)
- ▶ Household Hazardous Waste (HHW)
- ▶ Collection Point Management
- ▶ Lift Stations/POTW
- ▶ Vessels

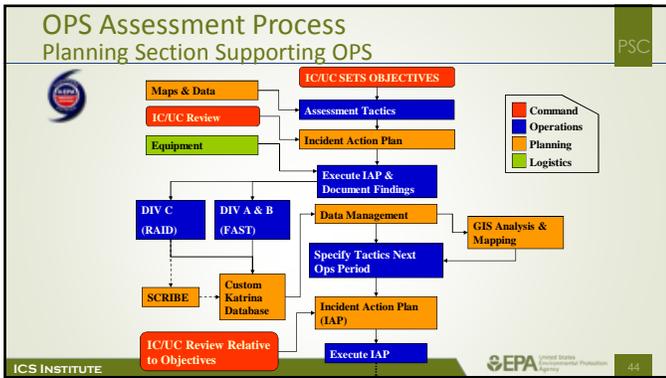
Recovering large gas cylinder

42

Operations - Assessment and Recovery Process

Systematic approach to identify and mitigate threats from oil and hazardous substances

- ▶ **Assessment**
 - Combined assessment teams (EPA, USCG, OFA, States, Contractors)
 - Systematic approach based upon grid overlay of assessment area
 - Includes ground, air, water operations
 - Priority given to immediate threats (e.g. NRC Reports)
 - Findings tracked via database maintained within Planning Section
- ▶ **Recovery** (Bulking, Sampling, Disposal non-HHW)
 - Systematic sweeps
 - Special operations (Large Tank Retrieval and/or Water Ops)



Operations – Grid System Planning Section Supporting OPS

1. Alabama and Mississippi – Assessment Area

Operations – Grid System
Planning Section Supporting OPS



2. Portion of "base layer" map prior to grid overlay

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Operations – Grid System
Planning Section Supporting OPS



3. Grid system overlay on base map

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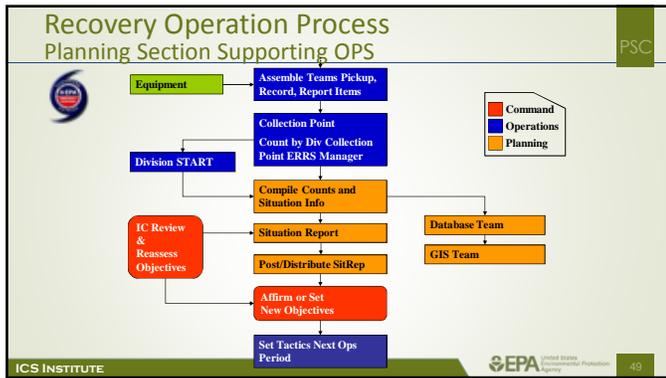
PSC

Operations – Assessment Photos



48

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Material Recovery Summary Planning Section Supporting OPS

Category	Total Alabama	Total Mississippi	Grand Total (number)	Percent of Total
Drums	250	3,747	3,997	1.6 %
Tanks	32	454	486	0.2 %
Totes	5	21	26	0.01 %
Cylinders	306	9,370	9,676	3.8 %
Batteries	160	13,292	13,452	5.3 %
Small Containers	3,004	225,139	228,143	89.1 %
Grand Total	3,757	252,023	255,780	100 %
Fuel	0*	90,400	90,400 (gal)	-
Oil/Water	4,000	157,900	161,900 (gal)	-

As of February 7, 2006
*Fuel and oil/water from vessels not reported.

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Operations – ASTs – Status Tracking Planning Section Supporting OPS

PSC

ID	Name	Status	Location
AST-001-001	AST-001	Normal	12345 Main St, Jackson, MS
AST-002-002	AST-002	Inactive	67890 Oak Ave, Hattiesburg, MS
AST-003-003	AST-003	Under Repair	11111 Pine Rd, Ocean Springs, MS
AST-004-004	AST-004	Normal	22222 Elm St, Gulfport, MS
AST-005-005	AST-005	Normal	33333 Maple Dr, Biloxi, MS
AST-006-006	AST-006	Normal	44444 Birch Ln, Ocean Springs, MS
AST-007-007	AST-007	Normal	55555 Cedar St, Ocean Springs, MS
AST-008-008	AST-008	Normal	66666 Birch Ln, Ocean Springs, MS
AST-009-009	AST-009	Normal	77777 Cedar St, Ocean Springs, MS
AST-010-010	AST-010	Normal	88888 Elm St, Ocean Springs, MS

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Operations – ASTs – Examples

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Operations – Above Storage Tanks (AST)

PSC

Storm Surge Overlay and AST Location Map, Gulf Coast, MS

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Operations – Collection Points

Click triangles to view Collection Point photos

Unified Command Organizational Chart

Logistics Section: Provides services and support to operations
Example: Food, comms, medical, supplies, facilities

Logistics Section

Responsible for providing facilities, services, and materials in support of the incident

- ▶ Identify service and support requirements for planned and expected operations
- ▶ Coordinate and process requests for resources (ICS form 213)
- ▶ Preparation of Medical Plan (ICS form 206)
- ▶ Preparation of Communications Plan (ICS form 205)

Logistics Section personnel at R4 Hurricane Katrina Response at Command Post, Biloxi MS

Logistics Specific Activities

- ▶ Facilities
 - Office space
 - Lodging
- ▶ Supplies
 - Office equipment
 - Field equipment
- ▶ Communication
 - 2-way
 - Internet



Satellite internet connection

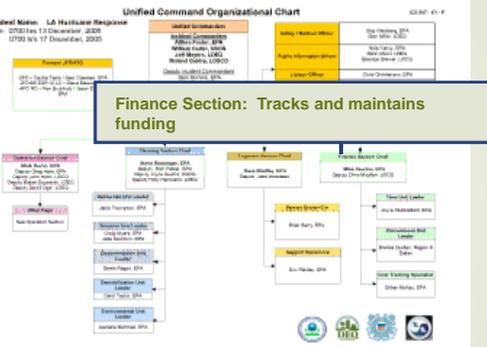
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Unified Command Organizational Chart

Incident Name: LA Hurricane Response
Date: 07/20 16:17 DisasterEvel 2005

ICS 301: 41-P

Finance Section: Tracks and maintains funding



59

Finance Section

Responsible for all financial, administrative, and cost analysis aspects of incident

- ▶ Track costs by mission assignment, contract ceilings, location (e.g. State)
- ▶ Track all EPA Personnel, START contracts, ERRS contracts
- ▶ Special accounting procedures to track:
 - FEMA vs. non-FEMA costs
 - Trust fund vs. non-trust fund



Finance Chief (left) tracking budget for R4 Hurricane Katrina Response at Command Post, ATC Mobile, AL

60

Unified Command Organizational Chart ICS 401 41-2

Residential Mobile - LA Maritime Response
 Date: 07/03 Feb 13 December, 2008
 LT700 9A-17 December, 2008

Planning Section: Develops IAP. Maintains situation and resource status for Operations

61

PSC Course Agenda - 2017 PSC

- Introduction (you are here)
- ICS Overview
- Planning Section Overview**
- PSC Interactions (Quiz)
- Planning Cycle (Quiz)
- Overview of SITL
- Meeting Facilitation Skills
- Facilitating an Initial Unified Command Meeting
- Overview of RESL
- RESL Issues
- Facilitating the C&GS Meeting
- Pre-Tactics Preparation Discussion
- Facilitating a Tactics Meeting
- Overview of the ENVL Position
- Facilitating a Planning Meeting
- ICS Forms (see below)
- Example IAP Review
- Strategies and Strategic Planning (Quiz)
- Facilitating an Ops Briefing
- Information Gathering (Quiz)
- Documentation Unit Overview
- PSC Toolbox/Go Kit (Quiz – includes all-module review)
- Demobilization and Transition Plans
- OPS Briefing Practice

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Planning Section Chief Major Responsibilities PSC

- Collect and manage all incident-relevant operational data (SCRIBE)
- Supervise preparation of the Incident Action Plan
- Conduct and facilitate planning meetings
- Provide periodic predictions on incident potential (NARAC)
- Compile and display incident status information (SitRep)

63

Planning Section Chief Using the Planning P

"Plans are nothing; Planning is everything."
- Eisenhower, Dwight D.

PSC Job #1: Navigate the IMT through the Planning P

64

Units Within the Planning Section

- ▶ Resource Unit
- ▶ Situation Unit
- ▶ Environmental Unit
- ▶ Documentation Unit
- ▶ Demobilization Unit

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Planning – Resource Unit

- ▶ Tracks status of assigned resources:
 - On-site personnel
 - Major equipment
- ▶ Check in/out procedures
- ▶ Prepares specific components of incident action plan
 - ICS Form 203 (Organization Assignment List)
 - ICS Form 204 (Assignment List)
 - ICS Form 207 (Organization Chart)

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Resource Unit Leader

PSC

- ▶ Oversees check-in of all resources
- ▶ Maintains status-keeping system of all resources
- ▶ Maintenance of a master list of all resources



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Resource Unit Leader Graduate Level RESL?

PSC

- ▶ Hybrid Tactics Meeting
- ▶ RESL works with OPS in Tactics Meeting to develop 204s from 215s
- ▶ Katrina lesson learned . . . saved 3 hours in IAP development



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Planning – Incident Action Plan

PSC

 Specifies IC/UC objectives and organizational structure, operational assignments, and supporting information per operational period

- ▶ General control objectives
- ▶ Reflects overall incident strategy
- ▶ Specifies action plan for next operational period
- ▶ Maps, telephone list, hospital locations



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Planning – Situation Unit

- Compile situation updates submitted by incident personnel
- Display incident information to keep all response personnel current
- Staff appropriate hotlines and monitor WebEOC for NRC reports
- Produce maps needed by operations
- Generate required status updates



SITL (left) consults with PSC and d-PSC, Katrina response, Metairie, LA

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Planning – Situation Report

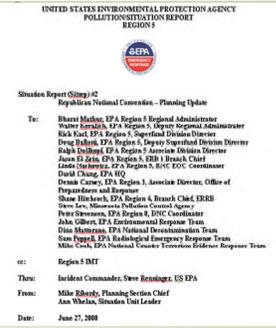
- Summary of Daily Incident Events and Activities
 - ▶ Submit daily to EPA Emergency Response Section Chief
 - ▶ Division and branch activity summary
 - ▶ Finances
 - ▶ Personnel resources
 - ▶ Future operations



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SitReps

- ▶ RNC Situation Unit Leader prepared SitReps for May, June, July, August.
- ▶ SitRep following National Template
- ▶ SitReps submitted daily during the RNC (Sept 1-4)



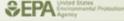
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RNC Website

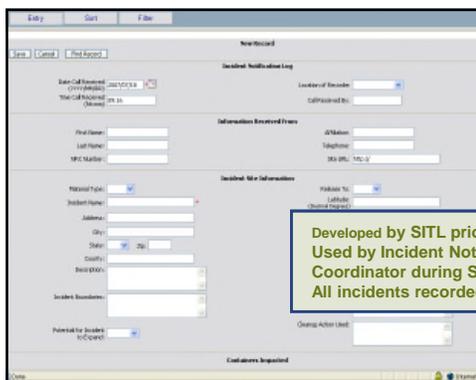

 EPA Region 5 established a password protected RNC website to post:

- SitReps
- Maps
- IAPs
- Org Charts

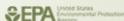




73

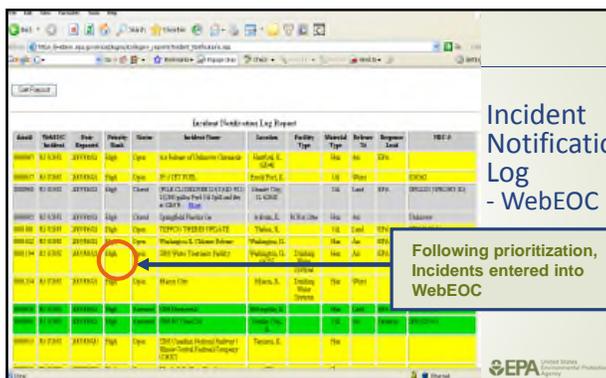
Incident Notification Log



Developed by SITL prior to SONS
 Used by Incident Notification Coordinator during SONS
 All incidents recorded & prioritized


74

Incident Notification Log - WebEOC



Following prioritization, incidents entered into WebEOC


75

Maps

- ▶ Maps updated hourly
- ▶ Posted to website
- ▶ Color coded
 - High priority (red)
 - Med priority (yellow)
 - Low priority (green)



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Planning – Environmental Unit

Advises on the collection of environmental data, and evaluates and interprets data relative to incident objectives and Operations

- Traditional ICS role, revised to meet EPA-specific needs
- Evaluates issues relative to planned operations in sensitive ecosystems in coordination with natural resource trustees



EU Example: Oak Glen crude pipeline spill, 2014

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EU Tasks: Salamanders and Shorelines



Protect during critical mating window

Net Environmental Benefit approach to cleanup



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Requires Close Coordination with Ops

PSC

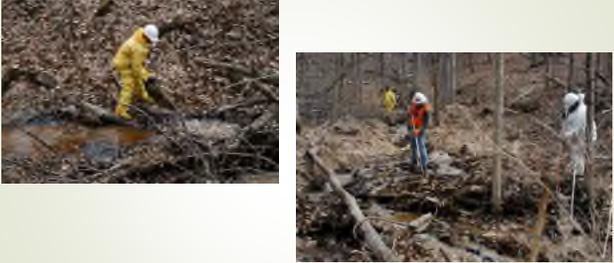


- ▶ Sunoco field EUL/SCAT rep was experienced spill responder, directed crews
- ▶ SCAT attended morning Ops Briefing with OSRO Team Leads, briefed 204
- ▶ SCAT attended tactics or pre-tactics meeting which included Ops Chief

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Shorelines Cleanup Monitoring

PSC



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Response Technique Assessment

PSC



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EPA Specialized Air Monitoring Equipment

ASPECT aerial monitoring system



Airborne Spectral Photometric Environmental Collection Technology

EPA's mobile air monitoring lab
Trace Atmospheric Gas Analyzer (TAGA)



ENVL requested ASPECT support for various incidents
ENVL developed TAGA candidates for air monitoring

82

Planning – Documentation

Archive and organization of all incident related information and data

- ▶ Document preservation plan
- ▶ Capture all electronic and paper documents
- ▶ Categorization by ICS organization structure
- ▶ Scan all documents
- ▶ Backup electronic data for remote divisions

DO NOT THROW ANYTHING AWAY!



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Planning – Information Technology (IT) Unit

Unit was created to utilize electronic data management systems to input, store, track, and display critical information (to support mapping)

- ▶ Database Team
 - Create and manage database
 - Generate operation-specific data reports
- ▶ GIS Team
 - Generate incident status maps
 - Operation-specific maps



IT Unit Personnel, R4 Hurricane Response, ICP Biloxi

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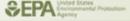
84

Planning – IT Unit – Database PSC

Extended Existing Tools to Capture and Manage Data Specific to Hurricane Katrina Operations

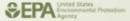
- ▶ **Features**
 - Response-specific data fields
 - Stand-alone (not internet dependent, not networked)
 - Automated and custom queries and reports
 - Non-proprietary, MS Access based
- ▶ **Management**
 - Designated administrator responsible for:
 - ✓ Data entry
 - ✓ Standardizing nomenclature
 - ✓ Export to GIS team

(Click here to view the first of four sample documents, then click document to view next document)

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Planning – IT Unit – GIS Products PSC

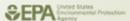
- ▶ **Incident Status Map** ([click here for example](#))
 - Small-scale snapshot of cumulative progress of assessment and removal operations
 - Updated per operational period or IC/UC request
- ▶ **Operation-Specific Maps** ([click here for example](#))
 - Large-scale map identifying specific locations
 - Designed for field use
- ▶ **Geospatial Analysis** ([click here for example](#))
 - Overlay multiple data sets to aid in prioritization of operations and/or assess effectiveness of efforts

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Planning – Field Observers PSC

 Personnel assigned to the Planning Section to observe and document specific field operations

- ▶ Monitor MDEQ-approved structural debris disposal sites for prohibited wastes
- ▶ Prevent prohibited wastes from entering debris sites
- ▶ Monitor segregation areas for adequate containment
- ▶ Provide guidance on waste handling and disposal practices
- ▶ Report observations to MDEQ

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Planning – Field Observers – Disposal Sites



Excavators pile Hurricane Katrina debris, MS

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Planning – Field Observers – Disposal Sites



Hancock County | Harrison County | Jackson County | Mobile County | Baldwin County

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PSC Course Agenda - 2017

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ **PSC Interactions (Quiz)**
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Tactics Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
- ▶ Facilitating a Planning Meeting
- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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PSC Course Agenda - 2017 PSC

- ▶ Introduction (you are here)
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- ▶ Planning Section Overview
- ▶ **PSC Interactions (Quiz)**
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
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- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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Unit 4
Planning Section Chief
Interactions PSC

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Unit 4 Objectives
Interactions PSC

- ▶ Describe the PSC's responsibility in supervising and managing the planning section
- ▶ Describe opportunities for interaction and information exchange
- ▶ Identify non-ICS personnel/groups the PSC may need to interact with on an incident

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Interactions PSC

- ▶ Three groups of people
 - IMT members (non-Planning Section)
 - Section personnel
 - Outside the IMT
- ▶ Each group needs to be related to differently

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Managing the Planning Section PSC

Due to the inherent responsibilities:

- ▶ Managing The Planning Section requires strong supervisory and interpersonal skills
- ▶ Coach/taskmaster/cheerleader and diplomat all rolled into one

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Managing the Planning Section – Supervision PSC

- ▶ What skills are necessary?

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Managing the Planning Section – Supervision PSC

- ▶ Review "Common Responsibilities" section in IMH (3-1)
- ▶ Review common "Unit Leader responsibilities" in the IMH (3-3)
- ▶ Review the PSC responsibilities section in the IMH (9-2)

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Managing the Planning Section – Initial Subordinates Briefing PSC

- ▶ Jurisdiction and command structure
- ▶ Environmental constraints
- ▶ Financial procedures and constraints
- ▶ Political considerations
- ▶ Security procedures
- ▶ Demobilization constraints and considerations
- ▶ Other pertinent information

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Managing the Planning Section – Establish Section Priorities PSC

- ▶ What is needed (expectations)?
- ▶ Who is responsible?
- ▶ When is it to be completed (time frame)?
- ▶ How is it to be delivered?
- ▶ How is it to be displayed (form)?
- ▶ Resources available, and . . .

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Managing the Planning Section – Coordination Issues

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Information Exchange Opportunities

- ▶ Official ICS-mandated Meetings:
 - Operational briefing
 - Command and General Staff Meeting
 - Tactics Meeting
 - Planning Meetings
- ▶ Unofficial (but critical) Meetings
 - Section/Unit meetings
 - Pre-tactics work period
 - Hallway/lunch meetings

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Information Exchange Opportunities – Daily Planning Section Meetings

9:00 a.m. C&G Staff Meeting
New tasks assigned

10:00 a.m. Planning Section Meeting
10:00—10:20 SITL update
10:20—10:40 RESL update
10:40—11:00 ENVL update

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Information Exchange Opportunities – Pre-Tactics Meeting

PSC

- ▶ For technical work, EU writes the plan, Ops executes the plan
- ▶ This requires trust, respect and close coordination between Ops and EU.



Excavation Planning at Mosier

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Who can I talk to?

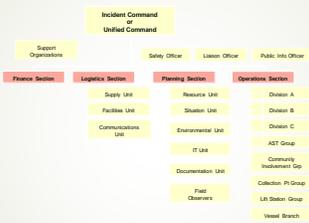
PSC

- ▶ Any and every one.
- ▶ Lines on the org chart represent chain of command, NOT COMMUNICATION PATHWAYS.
- ▶ If you gain information that may be useful to others, share it!

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Information Flow Discussion:

PSC



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PSC

Acting as a middle manager in ICS
BEYOND THE IMT

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Area Command PSC

- ▶ Expect increase in demand for intelligence information
- ▶ Expect increase in interaction
 - Conference calls
 - Reporting requirements
- ▶ *As PSC, you have critical role in establishing efficient and clear roles*

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Outside the IMT Influences PSC

- ▶ Regional and Headquarters management
- ▶ Regional Response Team
- ▶ National Response Team

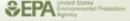
Possible Issues

- May not understand ICS structure
- Information requests – *counter with personnel request*
- Requests to modify objectives, strategy, or tactics

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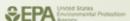
Review Objectives PSC

- ▶ Describe the PSC's responsibility in supervising and managing the planning section
- ▶ Describe opportunities for interaction and information exchange
- ▶ Identify non-ICS personnel/groups the PSC may need to interact with on an incident

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PSC Course Agenda - 2017 PSC

▶ Introduction (you are here)	▶ Facilitating a Tactics Meeting
▶ ICS Overview	▶ Overview of the ENVL Position
▶ Planning Section Overview	▶ Facilitating a Planning Meeting
▶ PSC Interactions (Quiz)	▶ ICS Forms (see below)
▶ Planning Cycle (Quiz)	▶ Example IAP Review
▶ Overview of SITL	▶ Strategies and Strategic Planning (Quiz)
▶ Meeting Facilitation Skills	▶ Facilitating an Ops Briefing
▶ Facilitating an Initial Unified Command Meeting	▶ Information Gathering (Quiz)
▶ Overview of RESL	▶ Documentation Unit Overview
▶ RESL Issues	▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
▶ Facilitating the C&GS Meeting	▶ Demobilization and Transition Plans
▶ Pre-Tactics Preparation Discussion	▶ OPS Briefing Practice

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Planning Cycle

PSC Course Agenda - 2017 PSC

- Introduction (you are here)
- ICS Overview
- Planning Section Overview
- PSC Interactions (Quiz)
- Planning Cycle (Quiz)**
- Overview of SITL
- Meeting Facilitation Skills
- Facilitating an Initial Unified Command Meeting
- Overview of RESL
- RESL Issues
- Facilitating the C&GS Meeting
- Pre-Tactics Preparation Discussion
- Facilitating a Tactics Meeting
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- Information Gathering (Quiz)
- Documentation Unit Overview
- PSC Toolbox/Go Kit (Quiz – includes all-module review)
- Demobilization and Transition Plans
- OPS Briefing Practice

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PSC

Unit 5

The Planning Cycle

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Objectives
The Planning Cycle PSC

1. Identify the five major milestones of The Planning Cycle
2. Describe the PSC's role in the planning meeting
3. Describe the purpose of the IAP
4. Describe the components of the IAP and who is responsible to prepare them

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Planning Cycle

Objectives
The Planning Cycle

5. Describe the PSC's role in the IAP
6. Identify who approves the IAP
7. List five people who need the IAP prior to publication
8. Describe the PSC's role in the Operations briefing
9. Describe other IMT meetings and briefings

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YOU Are Responsible!

- ▶ Meeting and Briefing Facilitation
 - Clearly defined objectives
 - Predetermined audience
 - Specific deliverables
 - Productive and efficiently as possible
- ▶ The Planning Cycle (See IMH, Chapter 4.)

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The Planning Cycle

- ▶ Establish Time Frames
- ▶ PSC is responsible
- ▶ Team's expectation
- ▶ Major Milestones
 - Tactics Meeting
 - Planning Meeting
 - Incident Action Plan Prep
 - Operational briefing
 - Incident Status Reports

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Planning Process

PSC



Introduction, Briefing, Initial Meeting

7

ICS Planning Process

PSC



Events
or
Incidents

- Understand the Situation
- Establish Incident Objectives and Strategy
- Develop the Plan
- Prepare and Disseminate the Plan
- Execute, Evaluate, and Revise the Plan

8

Planning Section Chief - The Planning P

PSC

PSC Job #1:
Navigate the IMT thru the Planning P



OPERATIONAL PERIOD PLANNING CYCLE

9

Written IAP Considered

PSC

What are the situations when you would consider developing a written Incident Action Plan?

10

When a Written IAP Is Considered

PSC

- ▶ Two or more jurisdictions are involved in the response
- ▶ The incident continues into the next operational period
- ▶ A number of ICS organizational elements are activated (typically when General Staff Sections are staffed)



11

What's an Operational Period?

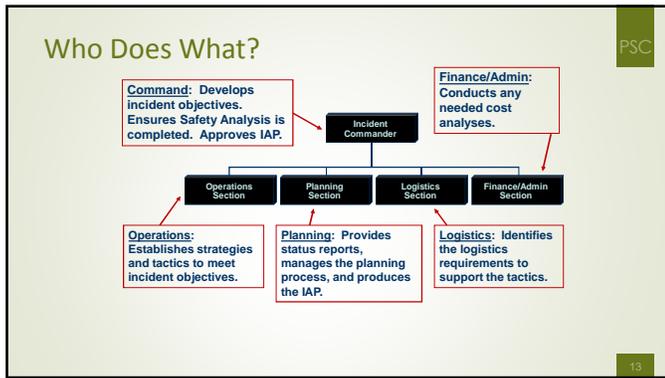
The designated time period in which tactical objectives are to be accomplished and reevaluated.

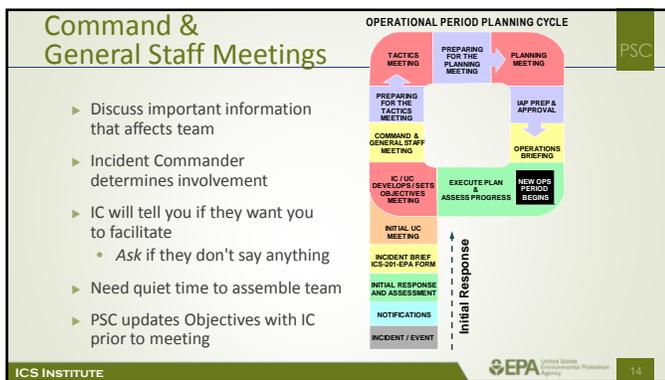
OPERATIONAL PERIOD PLANNING CYCLE

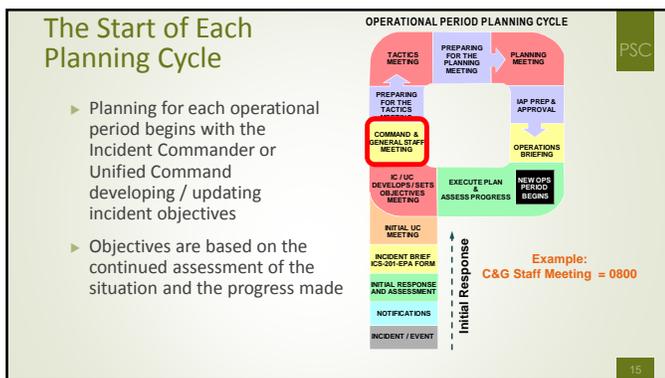


PSC

12





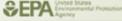


Command & General Staff Meeting Agenda
2007 R5 IMT @ SONS07

PSC

- ▶ Intro/no phones/30 min
- ▶ Objectives
- ▶ Action Items
- ▶ Planning Section
- ▶ Logistics Section
- ▶ Finance Section
- ▶ Operations Section
- ▶ Safety Officer
- ▶ Information Officer
- ▶ Liaison Officer
- ▶ IC



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Command & General Staff Meeting Agenda
2010 Enbridge IMT

PSC

- ▶ Intro/no phones/30 min
- ▶ Objectives
- ▶ Action Items
- ▶ Planning Section
- ▶ Logistics Section
- ▶ Finance Section
- ▶ Operations Section
- ▶ Safety Officer
- ▶ Information Officer
- ▶ Liaison Officer
- ▶ UC



- Enbridge Response ICP – 2010
- Three screens (Objectives, Action Tracker, Agenda Sheet)
- Vests only...LSC lock door

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Command & General Staff Meeting Agenda – ___ IMT

• Ground Rules (Cell/1 speaker/30 min)	PSC
• 207 (Roll Call)	PSC
• Opening Comments	IC
• Objectives/Key Decisions	IC/PSC
• Situation Update	SITL
• Action Items	PSC/Staff
• Information Issues	IO
• Liaison Issues	LNO
• Safety Issues	SO
• Finance Issues	FSC
• Logistics Issues	LSC
• Planning Section Issues	PSC
• Operations Section Issues	OPS
• IC/Closing Comments	IC
• Meeting Schedule	PSC

Planning Cycle

Strategy or Tactics Meeting

(1 to 3 hours prior to Planning Meeting)

- ▶ Operations Section Chief
- ▶ **Planning Section Chief**
- ▶ Logistics Section Chief
- ▶ Safety Officer
- ▶ **Resources Unit Leader**
- ▶ Others strictly as needed
- ▶ Meet to discuss the proposed plan that the OPS has developed – using the 215

The diagram illustrates the Operational Period Planning Cycle. It starts with 'Initial Response' at the bottom, leading to 'INCIDENT / EVENT', 'NOTIFICATIONS', 'INITIAL RESPONSE AND ASSESSMENT', 'INCIDENT BRIEF ICS-201-EPA FORM', and 'INITIAL ICS MEETING'. From there, it moves to 'IC / ICS DEVELOPS / SETS OBJECTIVES MEETING', 'COMMAND & GENERAL STAFF MEETING', 'PREPARING FOR THE TACTICS MEETING', and 'TACTICS MEETING'. This leads to 'PREPARING FOR THE PLANNING MEETING', 'PLANNING MEETING', 'IAP PREP & APPROVAL', 'OPERATIONS BRIEFING', 'EXECUTE PLAN & ASSESS PROGRESS', and finally 'NEW OPS PERIOD BEGINS', which loops back to 'Initial Response'.

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Tactics Meeting Agenda

24-Hour Operational Period: _____ - _____

• Intro/OPs Period/cell phones	PSC
• Org Chart	PSC
• Incident Objectives	PSC
• Situation/ Update	SITL
• Weather for next Ops Period	SITL
• OPs Plan (215)	OPS
• Update Ops 207	OPS
• Practice Briefing 215/207/Flex for Planning Mtg	SITL/OPS

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215 Completion Timing

A Completed 215 for the Tactics Meeting/Strategy Session will:

- ▶ Prevent unnecessary discussions of tactics
- ▶ Maximize effectiveness
- ▶ Avoid excessive external influences
- ▶ Promote a perception of organization
- ▶ Permit production of accurate 204s

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Tactics Meeting/Strategy Session

- ▶ Usually informal
- ▶ PSC facilitates to keep on track (PSC role)
- ▶ OPS explains proposed plan on a division by division or group by group basis
- ▶ Team members ask questions as needed
- ▶ PSC insures that plan is supportable

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The Tactics Meeting: Overview



Example: Tactics Meeting = 1200

- ▶ Purpose (215/204)
- ▶ Preparation (photo)
- ▶ Who Attends (PSC, OPS, RESL, SO)
- ▶ Who Leads (PSC . . . OPS)



OPERATIONAL PERIOD PLANNING CYCLE

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Hybrid Tactics Meeting 2013 in R5



- ▶ Katrina Lesson Learned
- ▶ Simultaneous production of 215 (OPS) and 204 (RESL)
- ▶ Request OPS to move thru 215 at a slower pace.....2-4 hrs off of IAP development

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Objectives, Strategies, and Tactics

Incident Objectives

State what will be accomplished.

↓

Strategies

Establish the general plan or direction for accomplishing the incident objectives.

↓

Tactics

Specify how the strategies will be executed.

Football analogy:
 Strategy = Get first downs
 Tactic = Use running back on sweep play

Tactics Meeting: Documentation

Operational Planning Worksheet, ICS Form 215

OPERATIONAL PERIOD PLANNING CYCLE

- INCIDENT / EVENT
- NOTIFICATIONS
- INITIAL RESPONSE AND ASSESSMENT
- INCIDENT BRIEF ICS-201-EPA FORM
- INITIAL IIC MEETING
- IIC / IUC DEVELOPS / SETS OBJECTIVES
- COMMAND & GENERAL STAFF MEETING
- PREPARING FOR THE TACTICS MEETING
- TACTICS MEETING
- PREPARING FOR THE PLANNING MEETING
- PLANNING MEETING
- MAP PREP & APPROVAL
- OPERATIONS BRIEFING
- EXECUTE PLAN & ASSESS PROGRESS
- NEW OPS PERIOD BEGINS

ICS Form 215 – Operational Planning Worksheet

Department / Unit / Resource	Resource Name	Resource Type	Resource Status										Reporting Location	Resource Available		
			1	2	3	4	5	6	7	8	9	10				
Parking Lot Group	Resource name from ICS-201-EPA Form	Person													Public Work Shop	1700
	Resource name from ICS-201-EPA Form	Person														
	Resource name from ICS-201-EPA Form	Person														
Division A	Resource name from ICS-201-EPA Form	Person													Public Work Shop	1700
	Resource name from ICS-201-EPA Form	Person														
	Resource name from ICS-201-EPA Form	Person														
Squad Group	Resource name from ICS-201-EPA Form	Person													Public Work Shop	1700
	Resource name from ICS-201-EPA Form	Person														
	Resource name from ICS-201-EPA Form	Person														
Total Resources - Single																
Total Resources - Other Types																

Preparing for the Planning Meeting

- ▶ OPS: Analyze the ICS 215 developed in the tactics meeting
- ▶ SO: Finalize the Incident Safety Analysis (ICS 215A) completed by the SO
- ▶ Assess current operations effectiveness and resource efficiency
- ▶ Pre-Planning Meeting "polling"
- ▶ IAP Checklist

PSC

31

IAP Checklist - Example

IAP CHECKLIST

Components of IAP	Primary Responsibility	Status
ICS 202 (Incident Objectives)	IC / OPS	
ICS 203 (Organization Assignment List)	RESL	
ICS 204 (Assignment List)	RESL	
ICS 205A (Incident Communications Plan)	COMM	
ICS 205 (Incident Radio Communications Plan)	COMM	
ICS 206 (Medical Plan)	LSO/RO	
ICS 207 (Organization Chart)	RESL	
ICS 210 (Air Operations Summary)*	OPS	
Incident Map	RESL	
Location Map of Individual Facilities	LSO / SO	
ICJ Database	OPS	
Safety Message	SO	
Traffic Plan	SHL / LSC	
Weather Forecast	RESL	
ICS 714 (Unit Log, Blank)	RESL	
ICS 230 (Daily Meeting Schedule)	PSC / RESL	

PSC

32

Incident Safety

Incident management must ensure the safety of:

- ▶ Responders to the incident
- ▶ Persons injured or threatened by the incident
- ▶ PSC: Request SO to prepare 215A for Planning Meeting
- ▶ PSC: Request SO to prepare Safety Message for Ops Briefing (2 min...Skippy @ Katrina)

PSC

33

Standard Display for Planning Meeting (EPA Examples)

PSC

Enbridge – ICP EPA Region 5
Note: PSC Go Kit Items: sheet / projectors / laser

BP – ICP
EPA Region 6

37

Planning Section Responsibilities

Situation Unit

- ▶ Intelligence and/or displays
 - Impacts to public health
 - Damage
 - Clean-up progression
 - Sampling locations and data
 - Risk analysis
 - Other
- ▶ Best method to get information across?

OPERATIONAL PERIOD PLANNING CYCLE

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Planning Section Responsibilities – Situation Unit @ Planning Meeting

PSC

SITL providing Weather Update & Situation Update with OPS
Note: FlexViewer

39

Planning Section Responsibilities – Environmental Unit @ Planning Meeting

ENVL summarizing air model. Supports Ops plan

PSC

40

Planning Section Responsibilities

Resources Unit

- ▶ Current status of resources
- ▶ Large 215 filled out
- ▶ Resource availability

OPERATIONAL PERIOD PLANNING CYCLE

TACTICS MEETING

PREPARING FOR THE TACTICS MEETING

COMMAND & GENERAL STAFF MEETING

IC/UC DEVELOPS/SETS OBJECTIVES MEETING

INITIAL UC MEETING

INCIDENT BRIEF ICS 201-EPA FORM

INITIAL RESPONSE AND ASSESSMENT

NOTIFICATIONS

INCIDENT / EVENT

↑ Initial Response

PREPARING FOR THE PLANNING MEETING

PLANNING MEETING

AP PREP & APPROVAL

OPERATIONS BRIEFING

EXECUTE PLAN & ASSESS PROGRESS

NEW OPS PERIOD BEGINS

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PSC

41

Planning Section Responsibilities

Planning Section Chief

- ▶ Incident Objectives
- ▶ Comparative analysis of Strategy vs. Objectives and progress
- ▶ Assigning someone to take notes or minutes
- ▶ Making sure the IC is there
- ▶ Making sure there are no surprises

OPERATIONAL PERIOD PLANNING CYCLE

TACTICS MEETING

PREPARING FOR THE TACTICS MEETING

COMMAND & GENERAL STAFF MEETING

IC/UC DEVELOPS/SETS OBJECTIVES MEETING

INITIAL UC MEETING

INCIDENT BRIEF ICS 201-EPA FORM

INITIAL RESPONSE AND ASSESSMENT

NOTIFICATIONS

INCIDENT / EVENT

↑ Initial Response

PREPARING FOR THE PLANNING MEETING

PLANNING MEETING

AP PREP & APPROVAL

OPERATIONS BRIEFING

EXECUTE PLAN & ASSESS PROGRESS

NEW OPS PERIOD BEGINS

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PSC

42



Planning Meeting Displays 2005

PSC

- ▶ Agenda
- ▶ Maps
- ▶ Incident Objectives
- ▶ ICS Form 215
- ▶ ICS Form 215A
- ▶ Katrina lesson: LCD projectors (3)

Hurricane Katrina ICP - 2005

44

Planning Meeting Displays 2007

PSC

- ▶ Agenda
- ▶ Maps
- ▶ Incident Objectives
- ▶ ICS Form 215
- ▶ ICS Form 215A
- ▶ Katrina lesson: LCD projectors (3)

SONG 07

45

Planning Meeting Displays 2010

PSC



- ▶ Agenda
- ▶ Maps
- ▶ Incident Objectives
- ▶ ICS Form 215
- ▶ ICS Form 215A
- ▶ Katrina lesson: LCD projectors (3)



Enbridge Response ICP - 2010

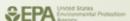
46

Planning Meeting Agenda

24-Hour Operational Period: Mar 22 (0700) – Mar 23 (0700)

PSC

• Intro/OPs Period/Ground Rules/cell phones	PSC
• Opening Comments	IC
• Org Chart	PSC
• Incident Objectives	SITL
• Situation/Update	SITL
• Weather	SITL
• OPs Plan (215)	OPS
• Safety	SO
• Team Consensus (FSC/LSC/SO/LNO/IO/UC)	Staff
• Schedule Highlights	PSC
• Closing Remarks	UC

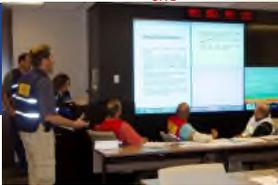
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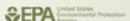
Planning Meeting Agenda

24-Hour Operational Period: Mar 22 (0700) – Mar 23 (0700)

PSC

• Intro/OPs Period/Ground Rules/cell phones	PSC
• Opening Comments	IC
• Org Chart	PSC
• Incident Objectives	SITL
• Always display Objectives. IC will compare plan against Objectives	
• Schedule Highlights	
• Closing Remarks	



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Planning Process



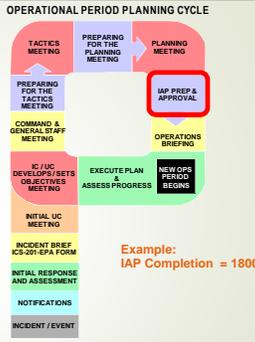
Planning Meeting

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IAP Preparation and Approval

Following the planning meeting:

- Organizational elements prepare IAP assignments and submit them to the Planning Section
- Planning Section collates, prepares, and duplicates the IAP document for the operational period briefing
- RESL coordinates with the LSC to acquire the amount and type of resources
- Incident Commander approves the IAP



Example: IAP Completion = 1800

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Unified Incident Management Team Incident Action Plan (IAP)

Oil & Hazardous Materials Response Annex

Operational Period(s) Starting: 0700 13 Ending: 0700 17

PSC & OPS (204s) conduct final review prior to IC approval

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IAP Recipients PSC

- ▶ Filled positions on ICS 203
- ▶ Positions on ICS Form 204 (not on ICS Form 203)
- ▶ Bulletin boards
- ▶ Facilities outside incident base (camps, staging areas, fixed wing base, and ATGS)
- ▶ Military needs
- ▶ Outside world
 - (1) Dispatchers
 - (2) Agency Execs/ Administrators
 - (3) NRT/RRT/ERT/HQ
- ▶ Extra copies
 - (1) Complete IAP
 - (2) IAP map only
- ▶ Post on response.epa.gov

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Duplication Considerations PSC

- ▶ Renting a copier
- ▶ Use of local copy company
- ▶ Use of contract copy service

Consider travel requirements, number of copies needed, equipment failure, and number of operational period IAPs needed

Overnight copy service used at Enbridge response in 2010

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Distribution Mechanisms PSC

- ▶ Print
- ▶ Web
- ▶ Remote location print off the Web
- ▶ Transport to remote locations

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Early Distribution to:

- ▶ Ground Support Unit Leader
- ▶ Food Unit Leader
- ▶ Supply Unit Leader
- ▶ Air Operations
- ▶ Agency Dispatch
- ▶ Medical Unit
- ▶ Communications Unit
- ▶ Contingencies to get IAP out to field operations

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Distribute IAP for Operational Briefing

- ▶ Approach varies with situation and number of personnel and copies
- ▶ Consider bundling for certain functions or groups
- ▶ Limited IAP numbers will require controlled distribution
- ▶ Must keep an original copy and corrected copy for Documentation

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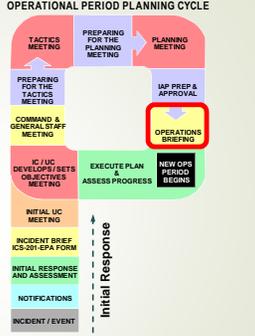
Preparing for the Operational Briefing

Why?

- ▶ Safety
- ▶ Effectiveness
- ▶ Last minute changes
- ▶ Clarify complex procedures



OPERATIONAL PERIOD PLANNING CYCLE



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Preparing for the Operational Briefing

- ▶ Select Briefing Time
 - Prior to any operational period
 - Plan for 30 minutes
 - Plan for travel time
- ▶ Who should attend?
- ▶ Select Briefing location
 - Large enough
 - Quiet enough
 - Audio system
 - Capable of displays, projection, etc.



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Operational Briefing

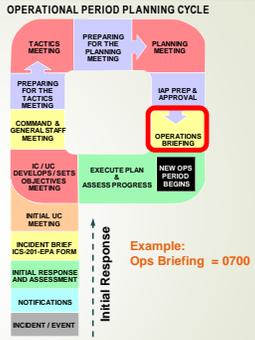
- ▶ Post Time and Location
- ▶ Notify Command and General Staff
- ▶ Make sure Planning Section Units are preparing their displays
- ▶ Determine Briefing Agenda
- ▶ Make sure your team is on the same page as you are

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Operations Briefing

The operations briefing:

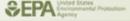
- ▶ Is conducted at the beginning of each operational period
- ▶ Presents the IAP to supervisors of tactical resources
- ▶ Should be concise
- ▶ 20-30 minutes



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Operations Briefing Agenda

▶ Intro/Ground Rules/Time Frame/Ops Period	PSC
▶ Incident Objectives	SITL
▶ Current Situation Update	SITL/OPS
▶ Weather Forecast	SITL
▶ Ops Org Chart	OPS
▶ Ops Assignments (204)	OPS
▶ Div/Grp Sup Mtg Note	OPS
▶ Safety Briefing	SO
▶ Logistics Update	LSC
▶ Finance Issues	FSC
▶ Information Issues	PIO
▶ Interagency Issues	LNO
▶ Next Ops Briefing @ _____	PSC
▶ Closing Comments	IC

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Operations Briefing



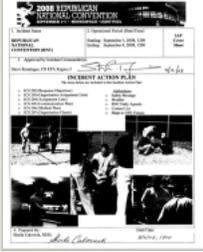


U.S. Hurricane Response
Unified Incident Management System (UIMS)
Incident Action Plan (IAP)
U.S. Environmental Protection Agency

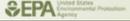
Operational Periods: Training: 1/18/08-2/1/08
Incident: 2/1/08-2/28/08

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Operations Briefing




OPS covering ICS 204s in IAP

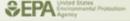
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Operations Briefing

PSC

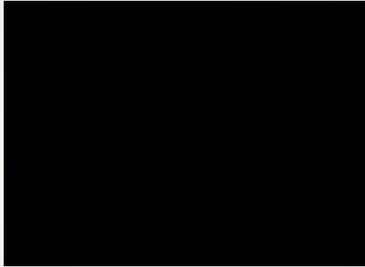


OPS Briefing at 2015 Galena, IL Train Derailment

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Planning Process

PSC



Ops Briefing

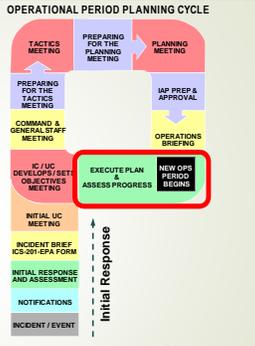
65

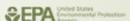
Execute Plan & Assess Progress

PSC

During the operation

- ▶ Operations monitors progress
- ▶ Develop plan for future operational period
- ▶ Situation provides intelligence needs for decisions



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Execute Plan & Assess Progress

During the operation

- OPS uses the ICS 215 to document needed
 - Resources
 - Supplies
 - Overhead
 - Proposed assignments

...for next operational period

The diagram shows a vertical cycle of activities. From bottom to top: INCIDENT / EVENT, NOTIFICATIONS, INITIAL RESPONSE AND ASSESSMENT (ICS 201-EPA FORM), INCIDENT BRIEF, INITIAL IIC MEETING, IIC / UC DEVELOPS / SETS OBJECTIVES MEETING, COMMAND & GENERAL STAFF MEETING, PREPARING FOR THE TACTICS MEETING, TACTICS MEETING, PREPARING FOR THE PLANNING MEETING, PLANNING MEETING, IAP PREP & APPROVAL, OPERATIONS BRIEFING, EXECUTE PLAN & ASSESS PROGRESS, and NEW OPS PERIOD BEGINS. A vertical arrow on the left indicates 'Initial Response'.

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Other Meetings and Briefings

Transition Meetings

- Will be discussed further in Unit #20
- Conducted when teams transition to another team or turn back to local management
- IC will tell you if he wants you to facilitate
 - Ask if they don't say anything

The diagram is identical to slide 67, with 'EXECUTE PLAN & ASSESS PROGRESS' and 'NEW OPS PERIOD BEGINS' highlighted in red.

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Other Meetings and Briefings

Planning Section Meetings

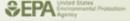
- Scheduled daily following C&G Staff meeting
- SITL=20 min, ENVL=20 min, RESL=20 min
- Discuss new tasks
- Need quiet time for maximum attendance
- Used to check on the "Planning Family" and coordinate within units
- Good problem solving time
- Transition with staff
- Proactive about issues

The diagram is identical to slide 67, with 'EXECUTE PLAN & ASSESS PROGRESS' and 'NEW OPS PERIOD BEGINS' highlighted in red.

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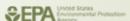
Review Unit Objectives PSC

1. Identify the five major milestones of The Planning Cycle
2. Describe the PSC's role in the planning meeting
3. Describe the purpose of the IAP
4. Describe the components of the IAP and who is responsible to prepare them

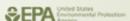
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Review Unit Objectives PSC

5. Describe the PSC's role in the IAP
6. Identify who approves the IAP
7. List five people who need the IAP prior to publication
8. Describe the PSC's role in the Operations briefing
9. Describe other IMT meetings and briefings

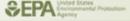
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Unit Quiz

ICS INSTITUTE  EPA United States Environmental Protection Agency 72

PSC Course Agenda - 2017 PSC

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ **Overview of SITL**
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Tactics Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
- ▶ Facilitating a Planning Meeting
- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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PSC Course Agenda - 2017 PSC

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Tactics Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
- ▶ Facilitating a Planning Meeting
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- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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Unit 6
Situation Unit Leader
Mission and Function

ICS INSTITUTE EPA United States Environmental Protection Agency 2

Unit 6 Objectives
Situation Unit Leader PSC

- ▶ Describe the responsibilities and functions of the Situation Unit (Situ)
- ▶ Describe work products and information exchange opportunities between Situ and others in IMT or beyond
- ▶ List things a PSC can do to help ensure Situation Leader success

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Introduction to the Situation Unit PSC

- ▶ Situation Unit is Responsible For
 - Determining information needs
 - Gathering information
 - Processing information
 - Displaying information
 - Turning information into Intelligence

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Job References PSC

- ▶ U.S. EPA Incident Management Handbook
 - "The SITL collects, processes, organizes, displays, and disseminates all incident information." (Status and situation.) IMH, p. 9-5.*
- ▶ Situation Unit Leader Job Aid

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Situation Unit Mission PSC

To support the IMT planning process by:

1. Providing incident personnel with timely and accurate incident status information via accurate displays and reports
2. Creating situation reports to send up the EPA management chain

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Effective Plans Require Intelligence

PSC

- ▶ Based on
 - Quality information
 - Timely information
 - Constantly updated information
 - Accurate and usable displays of information
 - Information that has been verified and analyzed



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Functions of the Situation Unit

PSC

To perform the functions of a SITL they have to understand the situation.



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Understand the Situation

PSC

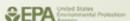
- ▶ What has happened?
- ▶ What progress has been made?
- ▶ What are the perimeters?
- ▶ What work is ongoing currently?
- ▶ What is our endpoint?



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Functions of the Situation Unit PSC

- ▶ Collecting and organizing status information relevant to the incident
- ▶ Analyzing and evaluating incident information
- ▶ Preparing and displaying incident information
- ▶ Providing mapping services
- ▶ Submitting reports and providing documentation
- ▶ *Providing predictive services (ENV)*
- ▶ *Providing risk assessments (ENV)*

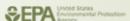
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Incident Information: PSC

Staging Areas
Sample Locations
Containers Collected
Cu Yds of disposed waste
Personnel On Scene
Air Monitoring Results
Shoreline Oiling
Photos
Etc.

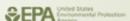
SITU Products:

- ▶ Briefing Maps
- ▶ Field Maps
- ▶ SitRep
- ▶ Progress tracking
- ▶ Incident Summary Display

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Approach to covering SitU PSC

- 1 – How to build/maintain accurate information
- 2 – Options for turning info into intel
- 3 – SitU responsibilities within Planning P
- 4 – SITL interactions with IMT members
- 5 – Going above and beyond
- 6 – Scenarios – group discussion
- 7 – PSC Role in SITL success

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Resources for Information PSC

Based on what you know about ICS and life, where would you recommend SITL go to look for information?

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Resources for Information PSC

- ▶ Debriefing OPS personnel
- ▶ Overflights
- ▶ Environmental Unit
- ▶ Agency GIS Staff
- ▶ State response / resource agencies
- ▶ Locals



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Resources for Information PSC

- ▶ Field Observers (FOBs)
- ▶ Meteorologist
- ▶ Talk to other IMT members
- ▶ Internet

Tip: *Be friendly. Be kind. Make it easy and pleasant for people who are providing information.*

Best Practice: *If Ops isn't pushing info, staff up SITU to pull info. Management decision on investment in rapid reporting*

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Types of Information

- ▶ Data
- ▶ Photos
- ▶ Narrative
- ▶ Maps
- ▶ GIS Layers
- ▶ Addresses
- ▶ Phone conversations

Phone call from field – Found the 3k gal tank by Highway 99, it's empty.

Email – Here is the local storm sewer outfall layer that you requested from Jim.

FOB delivery – Photo of Div A Collection Pad.

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Intelligence vs. Information

Intelligence is information that has been evaluated, analyzed, and processed into a useable format for the IMT.



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Intelligence vs. Information

- ▶ Categories of products:
 - Maps/Flexviewers
 - Reports
 - ICS Forms
 - Situation Briefings

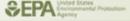
Information → Intelligence → Receiver

Unless you have all three pieces, reconsider producing the product!

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Intelligence vs. Information PSC

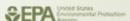
- ▶ Information from all sources relative to the incident must be gathered
- ▶ We must plan how and what information will be needed
- ▶ We must consider the past, present, and future of the incident
- ▶ Information is often (usually) flawed

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Turning Info into Intel
Maps / Flexviewers PSC

- ▶ Base Maps
- ▶ Overflight Maps
- ▶ Resource Status Maps
- ▶ Situation Maps
- ▶ Division Zone Maps
- ▶ Natural Resources At Risk & Protection Strategy Maps
- ▶ Trajectory Maps

See SITL Job Aid for details on who provides and when the products are needed.

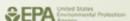
ICS INSTITUTE  20

Turning Info into Intel PSC

Maps / Flexviewers

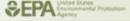
- ▶ Incident Overview Map
 - ICP, Divisions, Staging Areas, Roads, etc.
 - Orients responders and management
- ▶ Sampling/Monitoring Locations
- ▶ Maps to aid field operations staff

▶ *When do you pull the trigger on a flexviewer?*

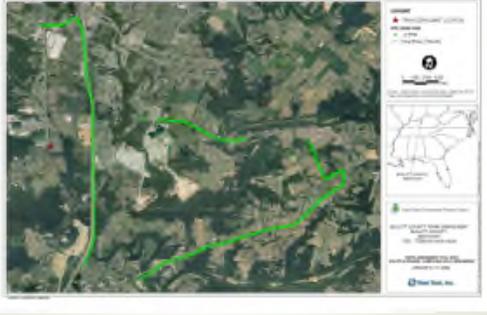
ICS INSTITUTE  21

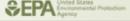
What makes a good map?

- ▶ Consider audience, and how they are using it
- ▶ Appropriate scale
- ▶ Complete legend
- ▶ Note date/time of data
- ▶ Informative title

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GIS

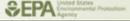


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NARAC



Parameter	Unit	Scale
PM2.5	µg/m³	0 - 100
PM10	µg/m³	0 - 1000
Ozone	ppb	0 - 100
CO	ppm	0 - 10
SO2	ppb	0 - 100
NO2	ppb	0 - 100
NO	ppb	0 - 100
Lead	ppb	0 - 100
Cadmium	ppb	0 - 100
Chromium	ppb	0 - 100
Copper	ppb	0 - 100
Iron	ppb	0 - 100
Manganese	ppb	0 - 100
Nickel	ppb	0 - 100
Silver	ppb	0 - 100
Zinc	ppb	0 - 100

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AreaRAEs

The slide features a central map of the United States with several red dots indicating AreaRAEs. To the left of the map are two photographs: the top one shows a field with a fence and utility poles, and the bottom one shows a blue container being moved by a forklift. A legend on the right side of the map lists various categories and symbols. The slide footer includes the ICS INSTITUTE logo, the EPA logo with the text 'United States Environmental Protection Agency', and the number 25.

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EPA United States Environmental Protection Agency

25

Turning Info into Intel

Reports

- ▶ Daily (?) SitRep
- ▶ Executive Situation Summary – the SITL has primary responsibility for the Executive Situation Summary, Situation Map, and the SitRep
- ▶ Incident Action Plan (IAP) – the SITL has primary responsibility for the Situation Map, Incident Objectives (ICS 202), and weather, current and tide forecast components of the IAP
- ▶ Close Out Reports – as appropriate

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The SitRep

- ▶ SitRep builder is in [Response.epa.gov](https://response.epa.gov).
- ▶ Audience: Management and stakeholders beyond the ICP.
- ▶ This is the most high-profile, and least operationally useful product of the SITU.
- ▶ Ensure you have adequate staff to meet information need.

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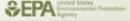
27

Turning Info into Intel PSC

Forms

- ▶ Daily Meeting Schedule (ICS 230)
- ▶ Meeting Situation Summary (notes, ICS 231)
- ▶ ACP Site Index (ICS 232a): (This function could also be performed by the ENVL)
- ▶ Form 214, *Unit Log*

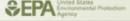
See SITL Job Aid for details on who needs each form and when is it needed.

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Turning Info into Intel PSC

Situation Briefings

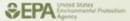
- ▶ At a minimum, the Situation Briefings should include:
 - Current situation / Incident Status
 - Incident potential
 - Weather and current information
- ▶ Best Practices:
 - Use graphics that are easily available or viewable
 - Show all talking points on map, if possible
 - Consider the audience for level of detail and duration
 - Encourage your SITL to prepare remarks; no off-the-cuff briefing

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Briefing Boards PSC

- ▶ Large Incident map
- ▶ Transportation map
- ▶ Current IAP
- ▶ SitRep

Can a flexviewer replace a briefing board?

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Crude Train Derailment: Mosier, OR

PSC

Incident Objectives

Org Chart

Aerial photos of incident

Meeting Schedule

Briefing Board: quick and functional, intended for ICP staff

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31

DWH Spill: Jackson, MS

PSC

DWH Spill: Jackson, MS

Briefing Board: thorough and considered, intended for ICP and field staff

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32

ICS Planning Process

PSC

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33

**Group Activity:
SITU role within the
Planning P**

- Break into 3 groups
- Use Post-It notes to ID product needs
- Use Job Aid to ID list of SITU products
- Choose one:
Hurricane Cleanup
Inland Oil Spill

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Planning Meeting Requirements

- ▶ Planning Meeting briefing Sketch Map and Detail Map
 - At a minimum prepare a Sketch Map, PowerPoint diagram, or MapQuest view
 - Not to scale
 - Shows Planning Meeting talking points
 - Detail Map needs to be large scale to be visible to all

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Planning Meeting Maps/Displays

- ▶ Incident mapping may be on:
 - Topographical maps
 - Planimetric maps
 - GIS
 - NARAC
 - PowerPoint
- ▶ We must produce a plot of the incident perimeter, operational boundaries and facilities

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Planning Meeting Maps/Displays

Maps and displays often speed and/or improve comprehension of intelligence reports

- ▶ Plume models (NARAC)
- ▶ Incident progression and/or damage
- ▶ Values and risks
- ▶ Evacuation
- ▶ Weather
- ▶ Imaging



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Planning Meeting Displays



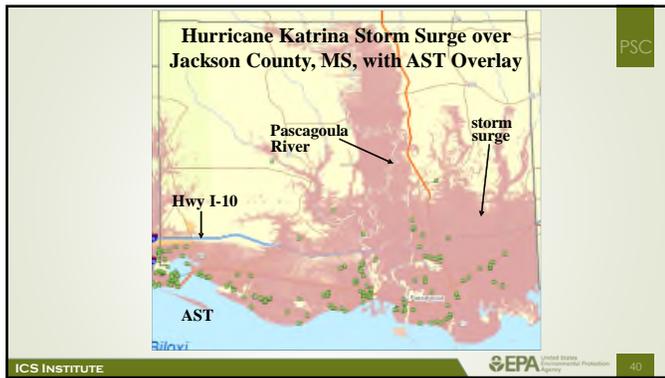
ICS INSTITUTE EPA United States Environmental Protection Agency 38

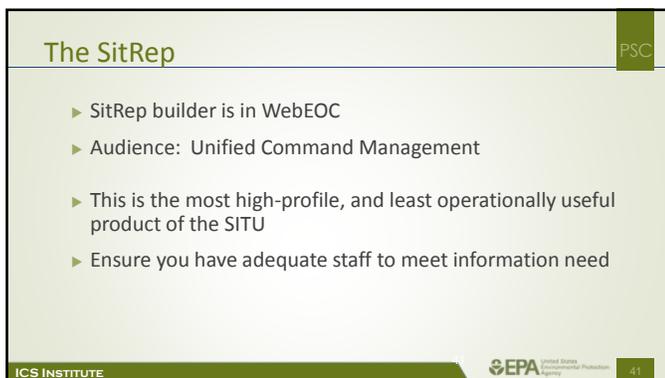
Planning Meeting Requirements

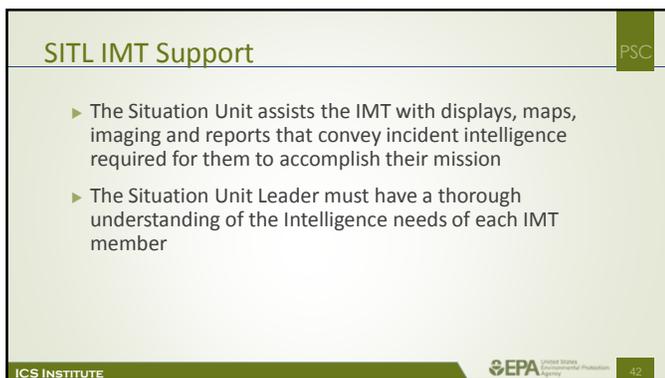
- ▶ Reports
 - Incident activity, location and progression
 - Spot Weather (Wx) forecast
 - Incident projection and risks
 - Values at risk
 - Threats to the environment and Endangered Species

Sometimes Sit Briefing = Ops only
Sometimes Sit Briefing = entire IMT work
Clarify for your SITL

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Incident Commander PSC

- ▶ Information release
- ▶ SitRep review time
 - % containment or mitigation
 - Status of incident
 - Priorities

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Operations Section Chief PSC

- ▶ Mapping needs
 - Field activities
 - Recon intel
 - Field direction (DIVS)
- ▶ Sampling location maps
- ▶ Sensitive areas, values, risks, losses
- ▶ System for debriefing DIVS
- ▶ Verify all incident facilities and traffic plans



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Public Information and Liaison Officers PSC

- ▶ Needs their intelligence and maps for press release
- ▶ Needs SitRep, ASAP
 - *Best Practice: PIO not to release maps or incident info unless confirmed by SITL*
- ▶ Make agreement on info board maintenance

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Safety Officer PSC

- ▶ Inform on incident status
- ▶ Threats / risk identification may be used in briefing materials
- ▶ Obtain injury info for SitRep

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Resource Unit PSC

- ▶ Assist in locating resources
 - Providing extra manpower or equipment for SITU to boost SITU function
- ▶ Obtain SitRep resource info



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Resource Advisors and Agency Reps PSC

- ▶ Sensitive resources and issues
- ▶ Map/data sources
- ▶ Local knowledge
- ▶ Keep informed – SitRep



Kalamazoo River: Yellow = critical habitat

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Finance Section PSC

- ▶ Provide SitRep
- ▶ Obtain SitRep cost info
- ▶ Answer questions when asked

- ▶ If your SITL is doing an awesome job, they are a sitting duck in the ICP with current information

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Compensation and Claims Unit PSC

- ▶ Provide info on damages and losses
- ▶ Assist with documentation and imaging of possible claims and losses
- ▶ Obtain info on reportable injuries
- ▶ (Not a common function on EPA responses)

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RRC / EOC Support PSC

- ▶ SitRep editing
- ▶ Obtain assistance / support as needed
 - Some products / intel creation are more easily done from the EOC
 - Consider how a flexviewer may facilitate coordination with EOC

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Success as a Situation Unit Leader

PSC

- ▶ Provide Intel not just history
- ▶ Answer the questions for our customers before they ask
- ▶ Support operations with what they need to know and provide products to speed field work
- ▶ Endeavor to delegate all tasks, and act as a reviewer / manager

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Hit the Scene Running

PSC

- ▶ Be prepared to do it all at a dead run for the first 48 hrs
- ▶ They expect a perfect map in minutes
- ▶ Must have “can do!” attitude
- ▶ Ingenuity
- ▶ Must be able to handle **STRESS**

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Staffing Considerations

PSC

- ▶ Work load
- ▶ Lag time / travel time
- ▶ Staffing hours
- ▶ Size and complexity
- ▶ IMT needs and products
- ▶ Public impact – PIO needs, RRC, HQ, etc.
- ▶ Imaging needs
- ▶ Projection needs – tech specs?
- ▶ GIS support (START contractor)



GIS Unit during Katrina Response

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Resources for Display Processing PSC

- ▶ Day/night display and Report processor
 - DPRO collect data, prepare displays and reports
- ▶ Computer service
- ▶ GIS Technician
- ▶ Plotter

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SIT Unit Positions PSC

- ▶ **DPRO** (display / report processor)
- ▶ **FOBS** (field observer)
- ▶ **IMET** (incident meteorologist)
- ▶ **GIST** (geographic information system specialist) (START)
- ▶ **Photographer**
- ▶ **Technical Specialist** (Tech/Spec)
- ▶ **Support Staff** (START)

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Going Above and Beyond PSC

- ▶ Establish and track metrics towards the UC-defined endpoints
- ▶ Create a story board or rolling slideshow that highlights operations and serves as a reminder to IMT members of their larger purpose
- ▶ Take the time to be nice

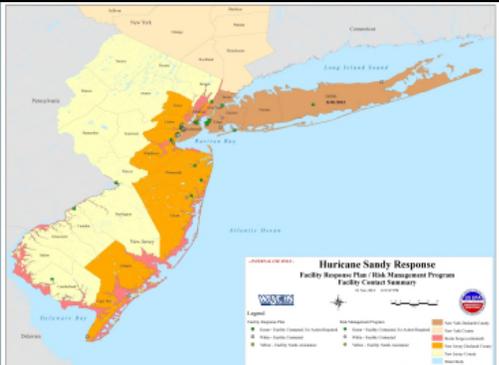


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Hurricane Sandy



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Hurricane Sandy Response Facility Status / Risk Management Program Facility Contact Summary
October 2012

Legend:

Facility Status	Not Responding/Unknown	Not High Potential/Not Early
● Active Facility (Operational)	● Active Facility (Operational)	● Not Responding
● Active Facility (Closed)	● Active Facility (Closed)	● Risk Management/Not
● Active Facility (Not Available)	● Active Facility (Not Available)	● Not Responding/Not
		● Not Responding

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Sit Unit Tasks

- ▶ Track notifications through NRC
- ▶ Provide Situation Briefings
- ▶ Generate SitRep
- ▶ Manage GIS services and maps
- ▶ Maintain Briefing Boards
- ▶ Track progress towards endpoints

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Key Successes

- ▶ Used password protected Data Viewer
 - Allowed all to see updated info
 - Reduced workload on GIS staff
- ▶ Daily field info collection in mid-afternoon
 - Well-prepared with latest info at Planning Meeting
- ▶ Added container counts at end of day
- ▶ Put all information into SitRep

SITL truly was first stop for incident information within IMT.

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Rapid Assessment Tool (RAT)

PSC

64

Data Management - SCRIBE

PSC

65

GIS

- ▶ Hospitals, daycares, schools
- ▶ Parcels (County)

PSC

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66

PSC

PSC Role in SITL Success

All content culled from previous slides

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PSC

PSC should . . .

- ▶ Enable SITL to tour incident upon arrival
- ▶ Ensure SITL is experienced/has Job Aid
- ▶ Provide clear expectations and priorities
- ▶ Proactively work with SITL to ensure needs of IMT are being met
- ▶ Ensure high-quality reporting from Ops
- ▶ Ensure SITU has tech support and staff
- ▶ QC products initially to build SITL credibility/trust

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PSC

Tools I need to pull this off

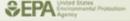
- ▶ 3 copies of the SITL job aid
- ▶ 3 large format Planning Ps
- ▶ Post-it notes

- ▶ Hard copies of 3 diverse SitReps

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PSC Course Agenda - 2017 PSC

▶ Introduction (you are here)	▶ Facilitating a Tactics Meeting
▶ ICS Overview	▶ Overview of the ENVL Position
▶ Planning Section Overview	▶ Facilitating a Planning Meeting
▶ PSC Interactions (Quiz)	▶ ICS Forms (see below)
▶ Planning Cycle (Quiz)	▶ Example IAP Review
▶ Overview of SITL	▶ Strategies and Strategic Planning (Quiz)
▶ Meeting Facilitation Skills	▶ Facilitating an Ops Briefing
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▶ Overview of RESL	▶ Documentation Unit Overview
▶ RESL Issues	▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
▶ Facilitating the C&GS Meeting	▶ Demobilization and Transition Plans
▶ Pre-Tactics Preparation Discussion	▶ OPS Briefing Practice

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- Example SITL experiences put at end.
- No intention of teaching them on this round, but seemed premature to delete them.

Hurricane Katrina

PSC

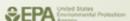
72

Planning – Situation Unit PSC

- ▶ Compile situation updates submitted by incident personnel
- ▶ Prepare daily situation reports (“SitRep”)
- ▶ Staff household hazardous waste and ESF#10 pickup hotline
- ▶ Post IAP and SitRep to internet
- ▶ Monitor WebEOC for Katrina related NRC reports



Operations Chief (left) consults with Situation Unit Leader, R4 Hurricane Katrina Response, ATC Mobile

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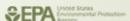
Planning – Information Technology Unit PSC

Unit was Created to Utilize Electronic Data Management Systems to Input, Store, Track, and Display Critical Information (in Recognition of Diverse Data Management and Mapping Needs)

- ▶ Database Team
 - Create and manage database
- ▶ GIS Team
 - Generate incident status maps
 - Operation-specific maps
 - Geospatial analysis of data

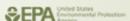


IT Unit Personnel, R4 Hurricane Response, ICP Biloxi

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Planning Meeting Agenda PSC

▶ Intro/OPs Period/Org Charts	PSC
▶ <u>Sit Map / Ops Update</u>	<u>SITL / OPS</u>
▶ Incident Objectives	PSC
▶ Weather	PSC
▶ OPs Plan (215)	OPS
▶ Safety	SO
▶ Team Consensus (Fin / LDEQ / EPA / USCG)	Staff
▶ Schedule Highlights	PSC
▶ Closing Remarks-Unified Command	USCG / EPA / LDEQ

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Planning Meeting

PSC



Situation Unit Leader uses maps to brief IMT on current status

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Operations Briefing Agenda

PSC

▶ Intro/Ground Rules/Time Frame/Ops Period	PSC
▶ Current Situation Update	OPS
▶ Incident Objectives	IC/PSC
▶ Weather Forecast	SITL
▶ Ops Assignments (204)	OPS
▶ Safety Briefing	SO
▶ Comm Plan Info	LSC
▶ Logistical Concerns	LSC
▶ Financial Concerns	FSC
▶ Information Plan & Updates	PIO
▶ Cooperating Agencies	LNO
▶ Next Ops Briefing @ 0800 (6/9/05)	PSC
▶ Next Planning Meeting @ 1200 (6/9/05)	PSC
▶ Closing Comments	IC

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Operations Briefing – 0700 Daily

PSC



Situation Unit Leader prepares maps and weather report for Operations Briefing

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WJ4 The document called for by the blue prompt needs to be embedded and animated to show up. Otherwise, the document must be in the exact folder displayed when you hover over the image on this slide. Or else the interactive prompt should be removed. ~ JBW

Weidner, Jeffrey, 2/17/2017

EPA's White Goods Recovery & Recycling




White Goods Summary Table (Noon 1/12 to Noon 1/16)		
Collection Locations	Reporting Period	Grand Total
510	0	0
Grand Isle	28	2,695
Jefferson	505	56,924
Lafourche/Terrebonne	0	772
Orleans	5,514	146,546
Plaquemines	1,041	2,778
St. Bernard	0	10,982
St. Tammany	1,691	55,963
Vermilion *	0	166
West Branch	0	0
Total	8,778	279,096
White Goods Cumulative Total		279,096

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PSC Course Agenda - 2017

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- Planning Cycle (Quiz)
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- Meeting Facilitation Skills**
- Facilitating an Initial Unified Command Meeting
- Overview of RESL
- RESL Issues
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- Information Gathering (Quiz)
- Documentation Unit Overview
- PSC Toolbox/Go Kit (Quiz – includes all-module review)
- Demobilization and Transition Plans
- OPS Briefing Practice

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UC Initial Meeting / Objectives Meeting

Purpose: UC develops objectives & key decisions
Attends: UC, PSC, SITL
Action Tracker
Key Decisions

OPERATIONAL PERIOD PLANNING CYCLE

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Initial Unified Command Meeting

- On-Scene Incident Commander (Local Fire)
- On Scene Coordinators (OSC)
 - Federal OSC from USEPA/USCG
 - State OSC
- Responsible Party
 - A Senior Transportation Officer will act as the lead railroad official.

Initial Unified Command Meeting of La Crosse, WI Exercise 2014. Establishing Initial Objectives

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Initial Unified Command – Objectives Meeting Agenda PSC

Ground Rules	PSC
Roll Call	PSC
Purpose of Meeting	PSC
Review 207	PSC
Key Decisions (see next slide)	PSC/UC
Develop/Update Objectives 202 (example to follow)	PSC/UC
Action Tracker	PSC/UC
Closing Comments	UC
Next Meeting (C&G Staff)	PSC

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Initial Unified Command – Objectives Meeting Agenda PSC

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Roll Call	PSC
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Develop/Update Objectives 202 (example to follow)	PSC/UC
Action Tracker	PSC/UC
Closing Comments	UC
Next Meeting (C&G Staff)	PSC

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Initial Unified Command – Objectives Meeting Agenda PSC

Ground Rules	PSC
Roll Call	PSC
Purpose of Meeting (Key Decisions/Objectives)	PSC
Review 207	PSC
Key Decisions (see next slide)	PSC/UC
Develop/Update Objectives 202 (example to follow)	PSC/UC
Action Tracker	PSC/UC
Closing Comments	UC
Next Meeting (C&G Staff)	PSC

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Initial Unified Command – Objectives Meeting Agenda

Ground Rules	PSC
Roll Call	PSC
Purpose of Meeting	PSC
Review 207	PSC
Key Decisions (see next slide)	PSC/UC
Develop/Update Objectives 202 (example to follow)	PSC/UC
Action Tracker	PSC/UC
Closing Comments	UC
Next Meeting (C&G Staff)	PSC

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ICS Form 207

Response Incident Management Assistance Team

Identify who is in Unified Command
 Identify lead KLPs

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Initial Unified Command – Objectives Meeting Agenda

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Closing Comments	UC
Next Meeting (C&G Staff)	PSC

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Key Decisions

Incident Name = _____

Unified Command = EPA, _____

Assisting/Cooperating Agencies = _____

ICP Location = _____

Operational Period #1 = Present to _____

Operational Period #2 = _____

Night Ops = Limited to lighted areas? _____

UC lead PID = _____

UC lead OPS = _____

IAP Components = Cover Sheet/202/203/204/205/206/207/Incident Map/Safety Message

230 Meeting Schedule =

C&G Staff @	_____
Tactics Mtg @	_____
Planning Meeting @	_____
Ops Briefing @	_____

UC Critical Reporting Thresholds =

Injury	_____
Media	_____
Evacuations	_____
Funding > \$	_____

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Initial Unified Command – Objectives Meeting Agenda

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Develop/Update Objectives 202 (example to follow)	PSC/UC
Action Tracker	PSC/UC
Closing Comments	UC
Next Meeting (C&G Staff)	PSC

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Incident Objectives (ICS202)

1. Enter into Unified Command with other Federal, State, and Local agencies as appropriate to ensure protection of public and response personnel health and safety.
1. Assess extent and impact of water and air releases along with impacts to human health and the environment
1. Recommend actions to address and minimize impacts of releases to human health and the environment and contain further migration of contaminants (oil)
1. Establish support and staging areas for field operations
1. Establish procedures and metrics for tracking and reporting progress of field activities in a timely manner
1. Establish mechanisms to provide relevant and accurate information to the media and public of response efforts and potential human and environmental impacts, including use of social media

Command Emphasis for Ops Period:

- 1.
- 2.

Safety Emphasis

- 1.
- 2.

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Initial Unified Command – Objectives Meeting Agenda PSC

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Roll Call	PSC
Purpose of Meeting	PSC
Review 207	PSC
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Develop/Update Objectives 202 (example to follow)	PSC/UC
Action Tracker	PSC/UC
Closing Comments	UC
Next Meeting (C&G Staff)	PSC

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Action Item List - Example PSC

1	A	B	C	D	E	F
2	Action	Date Assigned	ICS Section	Assigned To	Status	Date
3	Complete planning cycle	7/31/2010	Erbridge Planning	EPA PSC	Ongoing	daily
4	Prepare IAP (components due 1700)	7/31/2010	EPA Planning & Erbridge	RESL(s)	Ongoing	daily
5	Update DIT Organization Charts	7/31/2010	EPA Planning & Erbridge	RESL(s)	Ongoing	daily
6	Prepare STOREP (input by 1700)	7/26/2010	EPA Planning	SITL	Ongoing	daily
7	Integrate Environmental Data into SCRIBE	7/31/2010	EPA Planning	SITL Lam	Ongoing	daily
8	Resource staffing for graphic	8/1/2010	EPA Planning & Erbridge	RESL(s)	Ongoing	daily

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Initial Unified Command – Objectives Meeting Agenda PSC

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Roll Call	PSC
Purpose of Meeting	PSC
Review 207	PSC
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Action Tracker	PSC/UC
Closing Comments	UC
Next Meeting (C&G Staff)	PSC

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Initial Unified Command – Objectives Meeting Agenda		PSC
Ground Rules		PSC
Roll Call		PSC
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Develop/Update Objectives 202 (example to follow)		PSC/UC
Action Tracker		PSC/UC
Closing Comments		UC
Next Meeting (C&G Staff)		PSC

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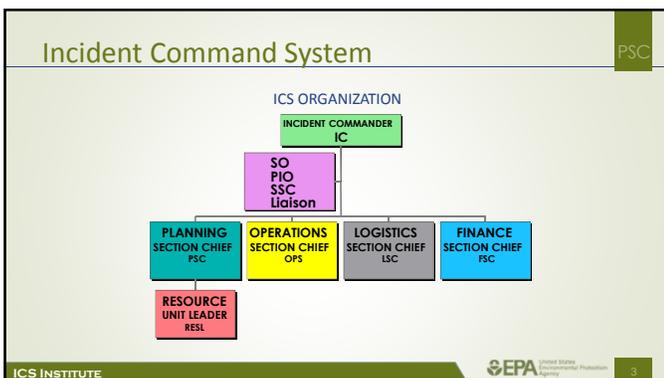
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Unit 8
Resource Unit Leader
Overview For PSCs

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Resource Unit Overview PSC

- ▶ Overview of Resource Unit Leader
- ▶ Check-in Procedures
- ▶ Tracking Resources
- ▶ Operational Planning
- ▶ Resource Unit Products

Overview of a 40 hour class in 1 hour

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What the Resource Unit Does PSC

- ▶ Oversees check-in of all resources
- ▶ Maintains status-keeping system of all resources
- ▶ Backbone of IAP development
- ▶ Maintenance of a master list of all resources
- ▶ 2010 Enbridge vs BP ID cards = resource tracking



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Resource Unit Leader Mission PSC

1. Establish and maintain check-in procedure
2. Track location and status of all tactical resources
 - Document resource location and change of status
 - T-cards or equivalent system...scan badges?



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Sources of Information PSC

- ▶ IC and Command Staff
- ▶ Planning Section Chief
- ▶ Operations Section
- ▶ Supply Unit
- ▶ Ground Support Unit
- ▶ Incident Briefing (ICS 201)



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Responsibilities PSC

1. Prepare and maintain applicable ICS forms as well as personnel and equipment lists
 - Attend Planning Meetings if invited
 - Assist with briefings if needed
 - Assemble Incident Action Plan (IAP)
 - Assist with demobilization
 - Respond to inquiries from incident staff
2. Maintain master file of Check-in Sheets



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Resource Unit Functions PSC

- ▶ Display resource status information
 - Post and maintain information about ICS organization
 - Display all of the tactical resources
- ▶ Maintain resource status cards (ICS 219)
 - Ensure resource information is recorded
 - Update status, as needed
 - Add/remove cards as necessary



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Resource Unit Functions

- Retrieve Resource Status Information
 - Know the status of all operational resources
 - Four types of status:
 - Assigned
 - Unassigned
 - Out-of-Service
 - En Route
 - Respond to requests about status and location



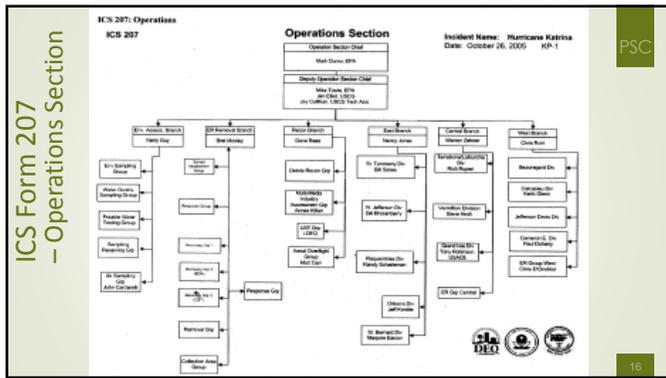
Resource Unit Functions

- Track IAP Components with Checklist
- Prepare Organizational Assignment List (ICS 203) and
- Prepare Division Assignment from ICS 204 from ICS 215 (OPS)
- Incident Organization Chart (ICS Form 207)

IAP Component Checklist			
ICS Form	Title	Prepared By	Submitted
IAP Cover	Cover	PSC/RESL	
202	Objectives	IC/PSC	
203	Org Assignment	RESL	
204	Division Assignment	RESL	
205	Comms Plan	LSC	
206	Med Plan	LSC/SOFR	
207	Org Chart	PSC/RESL	
209	Incident Sum. (use SitRep)	SUL	
214	Unit Log (use Sit Log)	SUL	
215	Ops Worksheet	OSC	
215a	Safety Analysis	SOFR	
230	Air Ops (Aspect7)	OSC	
Maps		SUL	
Traffic Plan		LSC	

ICS Form 203

Resource Unit -- Overview



Resource Unit Functions – Hybrid Tactics Meeting

- ▶ Prepare Assignment List (ICS Form 204 - EPA)
 - Information obtained from Operational Planning Worksheet (ICS 215 - EPA)
 - Identifies supervisors and contacts of given division/group for one operational period
 - Identifies TYPE, KIND, and NUMBER of assigned resources
 - Identifies transportation method, location, and timing
 - Identifies work assignments and special instructions

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Resource Unit Functions – Hybrid Tactics Meeting

- ▶ Katrina Lesson Learned
- ▶ Simultaneous production of 215 (OPS) and 204 (RESL)
- ▶ Request OPS to move thru 215 at a slower pace...
 ...2-4 hrs off of IAP development

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ICS Form 215
– Operational Planning
Worksheet

PSC

19

ICS Form 215 – Purpose

- ▶ Documents decisions made during the Tactics and later presented in the Planning Meeting
- ▶ Used to complete Assignment List (ICS 204 - EPA)
- ▶ Identifies shortages or excess resources
- ▶ Allows for safety assessments

PSC

20

ICS Form 204

- ▶ RESL converts 215 to 204 identifying specific resources with OPS
- ▶ 204 appears in the IAP
- ▶ Lesson Learned: Don't wait until after the Planning Meeting to start the 215 to 204 conversion

PSC

21

Activate Resource Unit

PSC

- 5. Set up process and contacts for resource status change information
- 6. Set up layout of resource status (T-Cards, Asset Tracker, Barber Chart)
- 7. Record initial resource status information



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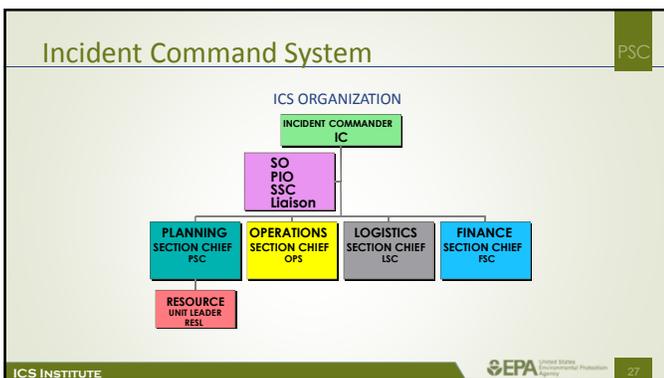
Activate Resource Unit

PSC

- 8. Compile resource numbers and types of information by agency
- 9. Post resource data on Incident Command Post Display(s)
- 10. Attend Operational Briefings



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Planning Section – Check-In Recorder

PSC

```
graph TD; PSC[PSC] --- RESL[RESL]; PSC --- SITL[SITL]; PSC --- DOCL[DOCL]; PSC --- DMOB[DMOB]; RESL --- SCR[STATUS/CHECK-IN RECORDER]; SITL --- TS[TECHNICAL SPECIALISTS]; DOCL --- ENVL[ENVL];
```

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Roles and Responsibilities

PSC

```
graph TD; IC[INCIDENT COMMANDER] --- PSC[PLANNING SECTION CHIEF]; PSC --- RUL[RESOURCE UNIT LEADER]; RUL --- SCR[STATUS/CHECK-IN RECORDERS];
```

MANAGE UNIT OPERATIONS; DELEGATE TASKS; PLAN & COORDINATE

RECORD CHECK-IN INFO. FORWARD ICS-211 INFO TO RESOURCES UNIT

COLLECT/RECORD STATUS INFO

FILL OUT 203s & 204s

FILL OUT, UPDATE AND RETRIEVE STATUS CARDS ("T" CARDS)

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Number of Unit Personnel

PSC

1. Size of the incident
2. Complexity of the incident
3. Number of resources assigned
4. Kind of resources assigned
5. Stage of the incident

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Staffing Guidelines

UNIT POSITION	SIZE OF INCIDENT (# OF DIVS/Groups)				
	2	5	10	15	25
Resource Unit Leader	1	1	2	2	4
Status Check-In Recorder <small>(Add for remote check in locations)</small>	1	2	3	3	5

PER OPERATIONAL PERIOD!

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CHECK-IN



Knowing the status of your resources is critical to incident success.

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Check-in Locations

1. Incident Command Post
2. Staging Area
3. Air Operations/Helibase
4. Division/Group Rally Point
5. Forward Operating Base
6. Other Identified Location



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Reporting Methods

- ▶ Let the RESL determine frequency of reporting
- ▶ Methods of reporting vary
 - Computers and other electronic means
 - Face-to-Face: Incident Command Post
 - Telephone (mobile or landline)
 - Runners: outlying location / poor radio link
 - Radio: outlying locations / good radio link



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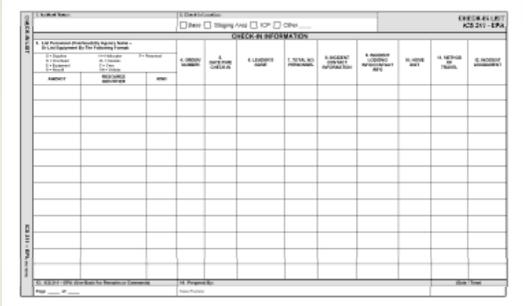
Reporting Methods

- ▶ Monitor check-in activities and be aware of pitfalls:
 1. Not enough Status Check-In Recorders
 2. Span of control too much
 3. Provide for personnel and material needs



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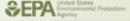
ICS Form 211 - Check-in List



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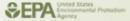
Check-in List (ICS Form 211) PSC

- ▶ Information Collected on the Check-in List:
 - Incident Name
 - Check-in Location
 - Date/time form is prepared
 - Agency
 - Resource Identifier (name)
 - Kind
 - Order/Number
 - Date/Time Check-in
 - Leader's Name

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Check-in List (ICS Form 211) PSC

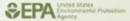
- ▶ Total Number of Personnel
- ▶ Incident Contact Information
- ▶ Incident Lodging Info / Contact Info
- ▶ Home Unit
- ▶ Method of Travel
- ▶ Incident Assignment
- ▶ Number of pages in document
- ▶ Form preparer information

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T-Card (ICS Form 219) PSC

- ▶ The purpose of a T-card is to provide a format for and record of:
 - Status of resource
 - Location
 - Demobilization



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T-Card (ICS Form 219)

219-1	GRAY	Header
219-2	GREEN	Teams
219-3	ROSE	Vehicles
219-4	BLUE	Equipment
219-5	WHITE	Overhead
219-6	ORANGE	Aircraft
219-7	YELLOW	Heavy Equipment
219-8	TAN	Miscellaneous Resources and Task Forces

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Layout and Filing of Resource Status Cards

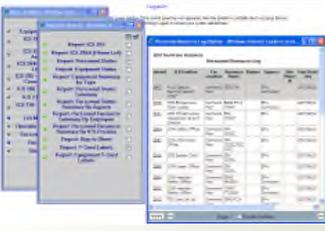
Completed resource status cards are filed in a rack called a **Resource Locator** or **T-card Rack**



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Resource Management - EPA Examples

- ▶ There are electronic ways to accomplish resource management
 - Electronic systems such as Asset Tracker in WebEOC or a “Barber Chart” are available
 - Resource unit leaders are learning both
- * Integrated databases or spreadsheets are superior for data integrity and documentation



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Resource Management PSC

Barber Chart (Excel spreadsheet)



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Task Forces and Strike Teams PSC

- ▶ Can be formed on the incident
- ▶ When formed on the incident they must be disassembled prior to release from the incident



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Incident Formed Strike Teams PSC

- ▶ A Strike Team is
 - A group of like resources working together under a Strike Team Leader
 - For example : Level A team with multiple tasks like sampling and monitoring



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Incident Formed Strike Teams

PSC



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Incident Formed Task Forces

PSC

► A Task Force is:

- A group of resources working together to achieve a specific mission under a Task Force Leader
- For example: One sampling team, one monitoring team, one drilling crew. Individual task or task specific



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Resource Unit Leader Responsibilities

PSC

1. Attends Incident Briefing and collects information about resource commitment and planning
 - Status of resources
 - Status of initial response resources
 - Obtains a copy of the incident briefing report (ICS-201)



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Resource Unit Leader Responsibilities

PSC

2. Accomplishes Pre-meeting Activities
 - Knows availability and status of resources:
 - ✓ Kind, type and numbers
 - ✓ Constraints and capabilities
 - ✓ Rest/work status
 - Meets with Operations Section Chief
 - ✓ Records Operational Information on ICS wall sized 215



RESL meets with OPS in Tactics Meeting

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Resource Unit Leader Responsibilities

PSC

3. Participates in Planning Meetings
 - Provides resource status information as requested
 - Displays ICS 215 information
 - Records changes on the ICS 215
 - Identifies excess or shortages of resources



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Resource Unit Leader Responsibilities

PSC

4. Accomplishes Post-meeting Activities
 - Clarifies the information needed to develop work products
 - ✓ Initiates order / request for needed resources
 - ✓ Develops work products to include in IAP



RESL, SO, and OPS meeting

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U.S. EPA Lessons Learned

Transcribing 215 information to 204s during or immediately after the Tactics Meeting greatly reduced IAP preparation cycle time.....2-4 hours daily.



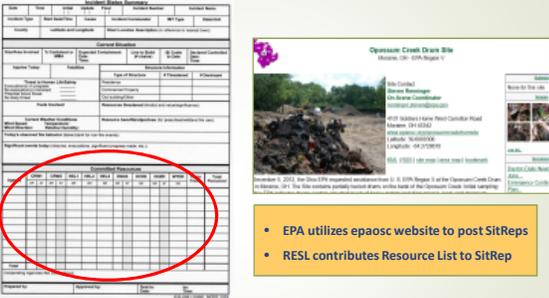
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Incident Action Plan



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ICS Form 209 (or SitRep)



- EPA utilizes epaosr website to post SitReps
- RESL contributes Resource List to SitRep

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Slide 57

WJ1 There is another image behind this; looks like maybe Side 2 of Form 209 -- the header reads "Outlook". It was there in the source module, not programmed to animate or reveal. Does presenter need to display it? If so, we can make it reveal with a click. ~ JBW

Weidner, Jeffry, 2/20/2017

RESL Routine Activities - Summary PSC

1. Prepare IAP components including the **Organization Assignment List** (ICS 203), **Organization Chart** (ICS 207) and parts of the **Division Assignment List** (ICS 204)
2. Monitor check-in function at incident locations including supervision status check-in recorders
3. Maintain and post the current status and location of all resources



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RESL Routine Activities – Summary continued PSC

4. Work with OPS to prepare **Operational Planning Worksheet** (ICS 215)....204
5. Attend Planning Meeting and Tactics Meeting
6. Provide personnel information to SITL for preparation of **SitRep** (ICS 209)
7. Attend Operational Briefing



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RESL Routine Activities – Summary continued PSC

8. Work with the Logistics Section Chief to determine resources ordered
9. Assign incident-formed strike teams and task forces
10. Respond to requests from incident personnel



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PSC

Unit 8

Resource Unit Leader
Overview For PSCs

Conclusion

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61

PSC

PSC Course Agenda - 2017

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ **PSC Interactions (Quiz)**
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ **RESL Issues**
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Tactics Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
- ▶ Facilitating a Planning Meeting
- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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PSC Course Agenda - 2017 PSC

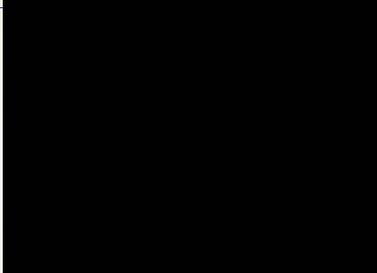
- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
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- ▶ Meeting Facilitation Skills
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- ▶ **Facilitating the C&GS Meeting**
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- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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Unit 9
Facilitating a
Command & General Staff Meeting

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Planning Process PSC



Initial Strategy Meeting

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The Start of Each Planning Cycle

- ▶ Planning for each operational period begins with the Incident Commander or Unified Command developing / updating incident objectives
- ▶ Objectives are based on the continued assessment of the situation and the progress made

Example: C&G Staff Meeting = 0900
Football analogy: Team huddle

OPERATIONAL PERIOD PLANNING CYCLE

Initial Response

OPERATIONAL PERIOD PLANNING CYCLE
Expires must succeed by assembling an IAP

PSC

4

1. Incident Name: LA Hurricane Response	2. Operational Period (Date/Time): From: 0700 13 Dec 05 To: 0700 17 Dec 05	ICS 201: Incident Objectives ICS 201-EPA
---	--	--

3. Objectives:

- 1) Ensure health and safety of the public and responders by identifying and conducting environmental assessments, controlling hazards, and conducting operations in accordance with the approved site safety and quality assurance sampling plan.
- 2) Conduct aggressive air, ground and water action and investigation activities to identify active and potential pollution targets, as well as confirm extent of hurricane damage to oil and chemical facilities and critical infrastructure.
- 3) Rapidly control, contain and mitigate all sources of pollution threatening or impacting public health and the environment inland, and within the commercially navigable waterways, in accordance with the memorandum signed by USCG and EPA delineating FOSC responsibilities (dated 2 Oct 05, amended 13 Oct 05).
- 4) Remove household hazardous waste and debris from impacted communities in close coordination with affected stakeholders.
- 5) Properly characterize and dispose of all hazardous materials in an efficient and effective manner, with all necessary documentation.

Prior to the Command & General Staff Meeting, the PSC and IC:

- ▶ Establish Objectives
- ▶ Review / modify / update Objectives

outreach programs.

- 9) Accurately document ESF #10 response actions and ensure it is captured in appropriate official repositories.
- 10) Manage a financial system that ensures accurate, efficient and effective accounting of resources; continually monitor ESF #10 funds and adjust operations as needed.

PSC

5

Command & General Staff Meeting Agenda 2007

- ▶ Intro / no phones / 30 min
- ▶ Objectives
- ▶ Action Items
- ▶ Planning Section
- ▶ Logistics Section
- ▶ Finance Section
- ▶ Operations Section
- ▶ Safety Officer
- ▶ Information Officer
- ▶ Liaison Officer
- ▶ IC

- Using Action Tracker, each KLP provides update
- IC/UC assigns new tasks

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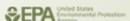
PSC

6

ACTION ITEM LIST – Aug 2010 EPA Enbridge Response

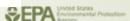


1	A	B	C	D	E	F
Action	Date Assigned	ICS Section	Assigned To	Status	Date	
2	7/31/2010	Enbridge Planning	EPA PSC	Ongoing	daily	
3	7/31/2010	EPA Planning & Enbridge	RESL(s)	Ongoing	daily	
4	7/31/2010	EPA Planning & Enbridge	RESL(s)	Ongoing	daily	
5	7/26/2010	EPA Planning	SITL	Ongoing	daily	
6	7/31/2010	EPA Planning	SITL Lam	Ongoing	daily	
7	8/1/2010	EPA Planning & Enbridge	RESL(s)	Ongoing	daily	

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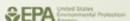
IAP Component Checklist

ICS Form	Title	Prepared By	Submitted
IAP Cover	Cover	RUL/PSC	
202	Objectives	ICP/SCRUL	
203	Org Assignment	RUL	
204	Division Assignment	RUL	
205	Comms Plan	LSC	
206	Med Plan	LSC/SOFR	
207	Org Chart	PSC	
209	Incident Sum. (use SitRep)	SUL	
214	Unit Log (use Sit Log)	SUL	
215	Ops Worksheet	OSC	
215a	Safety Analysis	SOFR	
220	Air Ops (Aspect)	OSC	
Maps		SUL	
Traffic Plan		LSC	
Safety Message		SOFR	

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C&G Staff Meeting Agenda

Updated Nov 2016

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Command & General Staff Meeting

Purpose: Initial IMT meeting.

Attends: C&G Staff

Review Key Decisions by UC

Review Objectives

Review Action Item List

13

Command & General Staff Meeting Agenda – IMT

- > Ground Rules (Call/1 speaker/30 min) PSC
- > 207 (Roll Call) PSC
- > Opening Comments IC
- > Objectives/Key Decisions IC/PSC
- > Situation Update SITL
- > Action Items PSC/Staff
- > Information Issues IO
- > Liaison Issues LNO
- > Safety Issues SO
- > Finance Issues FSC
- > Logistics Issues LSC
- > Planning Section Issues PSC
- > Operations Section Issues OPS
- > IC/Closing Comments IC
- > Meeting Schedule PSC

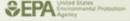
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Response Incident Management Assistance Team

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Command & General Staff Meeting Agenda – ____
IMT

- > Ground Rules (Call/1 speaker/30 min) PSC
- > 207 (Roll Call) PSC
- > Opening Comments IC
- > Objectives/Key Decisions IC/PSC
- > Situation Update SITL
- > Action Items PSC/Staff
- > Information Issues IO
- > Liaison Issues LNO
- > Safety Issues SO
- > Finance Issues FSC
- > Logistics Issues LSC
- > Planning Section Issues PSC
- > Operations Section Issues OPS
- > IC/Closing Comments IC
- > Meeting Schedule PSC

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1. Incident Name:	2. Operational Period (Date/Time):	ICS 202: Incident Objectives
LA Hurricane Response	From: 0700 13 Dec 05 To: 0700 17 Dec 05	ICS 202-EPA

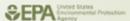
3. Objectives:

- 1) Ensure health and safety of the public and respond by identifying and conducting environmental assessments, controlling hazards, and conducting operations in accordance with the approved site safety and quality assurance sampling plans.
- 2) Conduct aggressive air, ground and water recon and investigation activities to identify active and potential pollution targets, as well as confirm extent of hurricane damage to oil and chemical facilities and critical infrastructure.
- 3) Rapidly control, contain and mitigate all sources of pollution threatening or impacting public health and the environment inland, and within the commercially navigable waterways, in accordance with the memorandum signed by USCG and EPA delineating FUSC responsibilities (dated 2 Oct 05, amended 13 Oct 05).
- 4) Remove household hazardous waste and debris from impacted communities in close coordination with affected stakeholders.
- 5) Properly characterize and dispose of all hazardous materials in an efficient and effective manner, with all appropriate documentation.
- 6) Minimize wildlife/domestic animal impacts. Coordinate rehabilitation of affected animals and recovery of deceased wildlife.
- 7) Manage a coordinated response effort with local, state, federal and industry partners and ensure adherence to policies, practices and plans, of all participating agencies.
- 8) Assure that all stakeholders are informed of response activities and enhance proactive media and community outreach programs.
- 9) Accurately document ESF #10 response actions and ensure it is captured in appropriate official repositories.
- 10) Manage a financial system that ensures accurate, efficient and effective accounting of resources; continually monitor ESF #10 funds and adjust operations as needed.

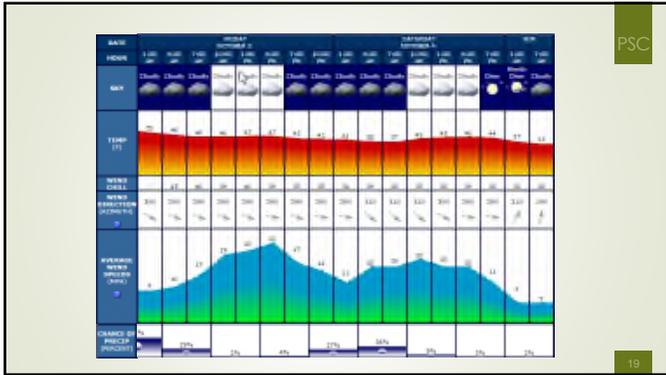
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Command & General Staff Meeting Agenda – ____
IMT

- > Ground Rules (Call/1 speaker/30 min) PSC
- > 207 (Roll Call) PSC
- > Opening Comments IC
- > Objectives/Key Decisions IC/PSC
- > Situation Update SITL/OPS
 - > Situation Update (Recall) SITL
 - > Update on Current Operations (OPG)
- > Action Items PSC/Staff
- > Information Issues IO
- > Liaison Issues LNO
- > Safety Issues SO
- > Finance Issues FSC
- > Logistics Issues LSC
- > Planning Section Issues PSC
- > Operations Section Issues OPS
- > IC/Closing Comments IC
- > Meeting Schedule PSC

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Facilitating a C&GS Mtg



Command & General Staff Meeting Agenda – IMT

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Ground Rules (Cell/1 speaker/30 min)	PSC
207 (Roll Call)	PSC
Opening Comments	IC
Objectives/Key Decisions	IC/PSC
Situation Update	SITL
Action Items	PSC/Staff
Information Issues	ID
Liaison Issues	LNO
Safety Issues	SO
Finance Issues	FSC
Logistics Issues	LSC
Planning Section Issues	PSC
Operations Section Issues	OPS
IC/Closing Comments	IC
Meeting Schedule	PSC

Action Item List

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No.	Topic	Status	Responsible Party	Date Assigned	Date Due	Date Completed
1						
2						
3						
4						
5						
6						
7						
LONGER TERM ITEMS						
8						
9						
10						
11						
12						

Active Items | Completed Items | (0)

Command & General Staff Meeting Agenda – ____
IMT

▶ Ground Rules (Cell/1 speaker/30 min)	PSC
▶ 207 (Roll Call)	PSC
▶ Opening Comments	IC
▶ Objectives/Key Decisions	IC/PSC
▶ Situation Update	SITL
▶ Action Items	PSC/Staff
▶ Information Issues	IO
▶ Liaison Issues	LNO
▶ Safety Issues	SO
▶ Finance Issues	FSC
▶ Logistics Issues	LSC
▶ Planning Section Issues	PSC
▶ Operations Section Issues	OPS
▶ IC/Closing Comments	IC
▶ Meeting Schedule	PSC

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Command & General Staff Meeting Agenda – ____
IMT

▶ Ground Rules (Cell/1 speaker/30 min)	PSC
▶ 207 (Roll Call)	PSC
▶ Opening Comments	IC
▶ Objectives/Key Decisions	IC/PSC
▶ Situation Update	SITL
▶ Action Items	PSC/Staff
▶ Information Issues	IO
▶ Liaison Issues	LNO
▶ Safety Issues	SO
▶ Finance Issues	FSC
▶ Logistics Issues	LSC
▶ Planning Section Issues	PSC
▶ Operations Section Issues	OPS
▶ IC/Closing Comments	IC
▶ Meeting Schedule	PSC

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Command & General Staff Meeting Agenda – ____
IMT

▶ Ground Rules (Cell/1 speaker/30 min)	PSC
▶ 207 (Roll Call)	PSC
▶ Opening Comments	IC
▶ Objectives/Key Decisions	IC/PSC
▶ Situation Update	SITL
▶ Action Items	PSC/Staff
▶ Information Issues	IO
▶ Liaison Issues	LNO
▶ Safety Issues	SO
▶ Finance Issues	FSC
▶ Logistics Issues	LSC
▶ Planning Section Issues	PSC
▶ Operations Section Issues	OPS
▶ IC/Closing Comments	IC
▶ Meeting Schedule	PSC

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Command & General Staff Meeting Agenda – ____
IMT

▶ Ground Rules (Cell/1 speaker/30 min)	PSC
▶ 207 (Roll Call)	PSC
▶ Opening Comments	IC
▶ Objectives/Key Decisions	IC/PSC
▶ Situation Update	SITL
▶ Action Items	PSC/Staff
▶ Information Issues	IO
▶ Liaison Issues	LNO
▶ Safety Issues	SO
▶ Finance Issues	FSC
▶ Logistics Issues	LSC
▶ Planning Section Issues	PSC
▶ Operations Section Issues	OPS
▶ IC/Closing Comments	IC
▶ Meeting Schedule	PSC

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Command & General Staff Meeting Agenda – ____
IMT

▶ Ground Rules (Cell/1 speaker/30 min)	PSC
▶ 207 (Roll Call)	PSC
▶ Opening Comments	IC
▶ Objectives/Key Decisions	IC/PSC
▶ Situation Update	SITL
▶ Action Items	PSC/Staff
▶ Information Issues	IO
▶ Liaison Issues	LNO
▶ Safety Issues	SO
▶ Finance Issues	FSC
▶ Logistics Issues	LSC
▶ Planning Section Issues	PSC
▶ Operations Section Issues	OPS
▶ IC/UC/Closing Comments	IC
▶ Meeting Schedule	PSC

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Command & General Staff Meeting Agenda – ____
IMT

▶ Ground Rules (Cell/1 speaker/30 min)	PSC
▶ 207 (Roll Call)	PSC
▶ Opening Comments	IC
▶ Objectives/Key Decisions	IC/PSC
▶ Situation Update	SITL
▶ Action Items	PSC/Staff
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▶ Finance Issues	FSC
▶ Logistics Issues	LSC
▶ Planning Section Issues	PSC
▶ Operations Section Issues	OPS
▶ IC/Closing Comments	IC
▶ Meeting Schedule	PSC

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Planning Cycle Meeting Schedule

Next Meeting = Tactics Mtg @ 1100

Who attends Tactics Mtg:
 PSC/SITL/ENVL
 OPS
 SO
 LSC
 FSC

31

Planning Process

2010 C&G Staff Meeting (0900 hrs @ Enbridge Response)

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PSC Course Agenda - 2017

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ **Pre-Tactics Preparation Discussion**
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
- ▶ Facilitating a Planning Meeting
- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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PSC Course Agenda - 2017

PSC

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
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- ▶ **Facilitating a Tactics Meeting**
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- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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Tactics Meeting

PSC

Purpose: Operations develops primary and alternative strategies to accomplish Incident Objectives for next Operational period

Attends: Ops/PSC/SO/RESL/SITL/LSC/ENVL

Develop 215

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2

Tactics Meeting Agenda

24-Hour Operational Period: ___ - ___

PSC

- ▶ Intro/OPs Period/cell phones PSC
- ▶ Org Chart PSC
- ▶ Incident Objectives PSC
- ▶ Situation/ Update SITL
- ▶ Weather for next Ops Period SITL
- ▶ OPs Plan (215) OPS
- ▶ Update Ops 207 OPS
- ▶ Practice Briefing 215/207/Flex for Planning Mtg SITL/OPS

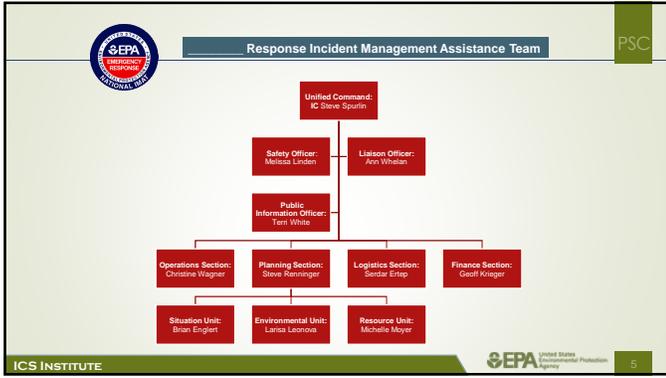
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3

Tactics Meeting Agenda PSC

24-Hour Operational Period: ____ - ____

- ▶ Intro/OPs Period/cell phones PSC
- ▶ Org Chart PSC
- ▶ Incident Objectives PSC
- ▶ Situation/ Update SITL
- ▶ Weather for next Ops Period SITL
- ▶ OPs Plan (215) OPS
- ▶ Update Ops 207 OPS
- ▶ Practice Briefing 215/207/Flex for Planning Mtg SITL/OPS

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Tactics Meeting Agenda PSC

24-Hour Operational Period: ____ - ____

- ▶ Intro/OPs Period/cell phones PSC
- ▶ Org Chart PSC
- ▶ Incident Objectives PSC
- ▶ Situation/ Update SITL
- ▶ Weather for next Ops Period SITL
- ▶ OPs Plan (215) OPS
- ▶ Update Ops 207 OPS
- ▶ Practice Briefing 215/207/Flex for Planning Mtg SITL/OPS

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1. Incident Name:	2. Operational Period (Date/Time):	ICS 202: Incident Objectives
LA Hurricane Response	From: 0700 13 Dec 05 To: 0700 17 Dec 05	ICS 202-2FA

3. Objective:

- 1) Ensure health and safety of the public and respond by identifying and conducting environmental assessments, controlling hazards and conducting operations in accordance with the approved site safety and quality assurance sampling plans.
- 2) Conduct aggressive air, ground and water recon and investigation activities to identify active and potential pollution targets, as well as confirm extent of hurricane damage to oil and chemical facilities and critical infrastructure.
- 3) Rapidly control, contain and mitigate all sources of pollution threatening or impacting public health and the environment inland, and within the commercially navigable waterways, in accordance with the memorandum signed by USCG and EPA delineating FOSC responsibilities (dated 2 Oct 05, amended 13 Oct 05).
- 4) Remove household hazardous waste and debris from impacted communities in close coordination with affected stakeholders.
- 5) Properly characterize and dispose of all hazardous materials in an efficient and effective manner, with all appropriate documentation.
- 6) Minimize wildlife/domestic animal impacts. Coordinate rehabilitation of affected animals and recovery of deceased wildlife.
- 7) Manage a coordinated response effort with local, state, federal and industry partners and ensure adherence to policies, practices and plans, of all participating agencies.
- 8) Assure that all stakeholders are informed of response activities and enhance proactive media and community outreach programs.
- 9) Accurately document ESF #10 response actions and ensure it is captured in appropriate official repositories.
- 10) Manage a financial system that ensures accurate, efficient and effective accounting of resources; continually monitor ESF #10 funds and adjust operations as needed.

ICS INSTITUTE PSC

Tactics Meeting Agenda

24-Hour Operational Period: ____ - ____

▶ Intro/OPs Period/cell phones	PSC
▶ Org Chart	PSC
▶ Incident Objectives	PSC
▶ Situation/ Update (Flexviewer)	SITL
▶ Weather for next Ops Period	SITL
▶ OPs Plan (215)	OPS
▶ Update Ops 207	OPS
▶ Practice Briefing 215/207/Flex for Planning Mtg	SITL/OPS

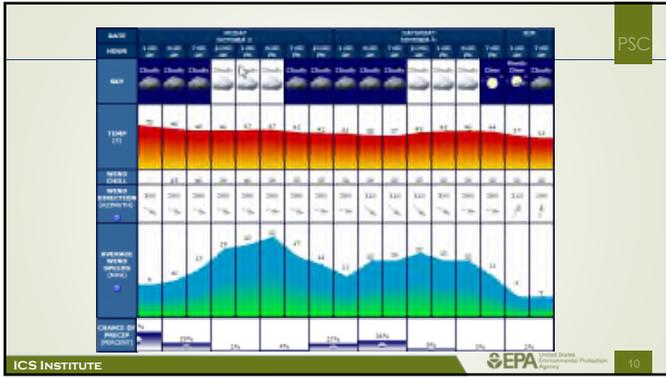
ICS INSTITUTE EPA United States Environmental Protection Agency

Tactics Meeting Agenda

24-Hour Operational Period: ____ - ____

▶ Intro/OPs Period/cell phones	PSC
▶ Org Chart	PSC
▶ Incident Objectives	PSC
▶ Situation/ Update	SITL
▶ Weather for next Ops Period	SITL
▶ OPs Plan (215)	OPS
▶ Update Ops 207	OPS
▶ Practice Briefing 215/207/Flex for Planning Mtg	SITL/OPS

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Tactics Meeting Agenda

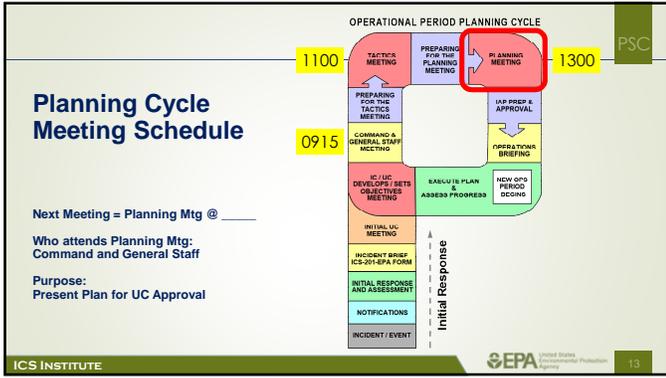
24-Hour Operational Period: _____ - _____

- ▶ Intro/OPs Period/cell phones PSC
- ▶ Org Chart PSC
- ▶ Incident Objectives PSC
- ▶ Situation/ Update SITL
- ▶ Weather for next Ops Period SITL
- ▶ OPs Plan (215) OPS
- ▶ Update Ops 207 OPS
- ▶ Practice Briefing 215/207/Flex for Planning Mtg SITL/OPS

Tactics Meeting Agenda

24-Hour Operational Period: _____ - _____

- ▶ Intro/OPs Period/cell phones PSC
- ▶ Org Chart PSC
- ▶ Incident Objectives PSC
- ▶ Situation/ Update SITL
- ▶ Weather for next Ops Period SITL
- ▶ OPs Plan (215) OPS
- ▶ Update Ops 207 OPS
- ▶ Practice Briefing 215/207/Flex for Planning Mtg SITL/OPS



PSC Course Agenda - 2017

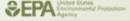
<ul style="list-style-type: none"> ▶ Introduction (you are here) ▶ ICS Overview ▶ Planning Section Overview ▶ PSC Interactions (Quiz) ▶ Planning Cycle (Quiz) ▶ Overview of SITL ▶ Meeting Facilitation Skills ▶ Facilitating an Initial Unified Command Meeting ▶ Overview of RESL ▶ RESL Issues ▶ Facilitating the C&GS Meeting ▶ Pre-Tactics Preparation Discussion 	<ul style="list-style-type: none"> ▶ Facilitating a Tactics Meeting ▶ Overview of the ENVL Position ▶ Facilitating a Planning Meeting ▶ ICS Forms (see below) ▶ Example IAP Review ▶ Strategies and Strategic Planning (Quiz) ▶ Facilitating an Ops Briefing ▶ Information Gathering (Quiz) ▶ Documentation Unit Overview ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review) ▶ Demobilization and Transition Plans ▶ OPS Briefing Practice
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Environmental Unit -- Overview

PSC Course Agenda - 2017 PSC

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Tactics Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ **Overview of the ENVL Position**
- ▶ Facilitating a Planning Meeting
- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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Unit 11
Planning Section Chief
Environmental Unit – Mission, Functions and Management

ICS INSTITUTE  2

NIMS Says: PSC

The environmental unit would prepare environmental data for the Situation Unit and work in close coordination with other units and sections within the ICS structure to enable effective decision support to the IC or UC.

Source: Page 78 NIMS 

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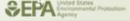
Environmental Unit -- Overview

Environmental Unit Mission Statement PSC

The Environmental Unit of the Planning Section is established to promote the use of science and engineering principles to support response decisions.

Source: EPA ENVL Job Aid, March 2017, p.1

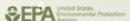
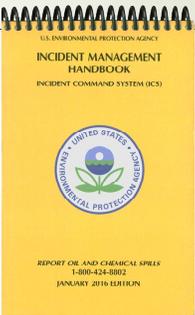
Source: Page 28 A-10



4

EPA Environmental Unit PSC

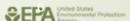
- ▶ Incident Management Handbook (IMH)
- ▶ EPA ENVL Job Aid



5

ENV Module Roadmap PSC

- ▶ Overview of EU responsibilities
- ▶ Group Activity: incident-specific EUs
- ▶ PSC Role in EU success
- ▶ *Spoiler Alert: very few photos*

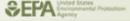


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Environmental Unit -- Overview

Environmental Unit Responsibilities (1 of 2) PSC

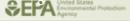
- Sampling Planning, Analysis, and Environmental Monitoring;
- Quality Assurance;
- Data Evaluation, Processing, and Interpretation;
- Environmental Modeling;
- Assess Response and Cleanup Technologies;
- Perform Ecological and Human Health Assessments

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Environmental Unit Responsibilities (2 of 2) PSC

- Coordinate with HQ ENV
- Identify need for permits and other authorizations
- Recommend cleanup endpoints

- **Proactively inject good science into response decisions**

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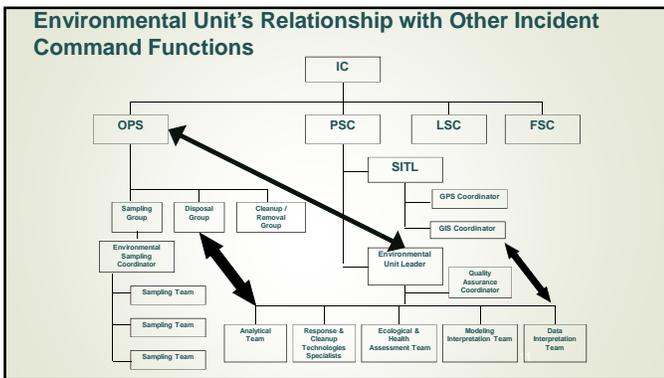


Environmental Unit -- Overview

Organizing the ENV

- ▶ Span of control
- ▶ Based on function
- ▶ Can expand and contract
 - Size of response
 - Nature of response
 - Stage of response
- ▶ Varies widely between responses

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Communicate with IMT

It is key to have Open Communication With all members of the IMT.

Refer to pp. 7-8 of Job Aid.

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Environmental Unit -- Overview

MEET WITH	ENVL OBTAINS	ENVL PROVIDES
Planning Section Chief	Approval for additional personnel and resources Guidance on needs of IMT	Environmental information Recommendations for response options Current and Future priorities and actions Plans, Data, Interpretations, and other products
Operations Section Chief (OPS)	Incident situation status during initial phase and throughout entire incident Buy-in from OPS on plan development for sampling and response options	Recommendations for response options Sampling and analysis plans Interpreted data, modeling results, technical information, etc
Public Information Officer	NA	Environmental data, information, and interpretations in plain language
Environmental Unit Personnel	Information from tech specialists Products	Information, products, plans, data, constraints, etc.
Situation Unit	Access to database, GIS products (maps, charts), and situational updates	Environmental data and data interpretation Information for displays (maps, charts, tides, weather, etc.)
Liaison Officer	Cooperating agency and other stakeholder participation	Expertise to Science Advisory Board, if applicable
Scientific Support Coordinator	Special Topic Briefings	Incident Environmental Data and Interpretation

PSC

Some moments are more powerful than others

- ▶ Your primary goal is to infuse the response with good science and enable the best decisions to be made by planning and ops.
- ▶ Be sensitive of their planning cycle when making recommendations.

PSC

Who can help your ENVL?

- ▶ Typical: ERT, START, OSCs
- ▶ Local resource trustees
- ▶ Area Committee Members



The Cosmos News

PSC

Environmental Unit -- Overview

Data Management within ICS

PSC

UC sets objectives
ENVL/Ops plan data gathering
ENVL writes QAPP
Data Management Plan?

Ops gathers data
SITL manages data

PIO, LSC message data

OPS, PSC and UC use data to drive decisions

ENVL validates and analyzes data
SITL displays data

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ICS Organizational Structure

PSC

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Command Staff: Data Support Coordinator

PSC

- ▶ Evaluate Incident Objectives and develops an incident-specific Data Management Plan.
- ▶ Establish an appropriate data management organizational structure to achieve incident objectives and assist unit leaders with the tasking of personnel to ensure the effective implementation of the incident-specific Data Management Plan.
- ▶ Ensure that data management activities support data and information transparency across various organizational levels: IMT, EPA Management, Stakeholders, Public, etc.
- ▶ Ensure that data summaries and reports support the internal and external release of data and information.
- ▶ Serve as the primary point of contact for all data management issues and needs for the response.

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Environmental Unit -- Overview

There is a plan . . . Consult at expert.

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19

EU Resource Consideration

- ▶ Lag/Travel time
- ▶ Shifts and hours
- ▶ Number of tours of duty
- ▶ Contractors/COR responsibilities
- ▶ Reach back vs. onsite
- ▶ H&S requirements

PSC issue: Do ENV Tech Specs need a handler?

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20

Criteria for a Successful Unit

- Consider working conditions
- Coordinate with Operations
- Eliminate duplication of effort
- Advise personnel on what requires Environmental Unit Leader approval
- Get the right resource, in the right place, at the right time

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21

PSC

GROUP ACTIVITY

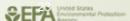
Break into 3 groups.
1 ENVL Job Aid, 1 flip chart

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PSC

GROUP ACTIVITY

- ▶ For each scenario:
 - Identify key issues for ENV to address
 - Identify other parts of the IMT that would need to be engaged for each issue.
 - Create basic org chart that would meet those needs
 - Do not get hung up on technicalities, ask or make assumptions and move on.
- ▶ We will do the first one together.
- ▶ You have 40 min for the final 2.
- ▶ You will report back to group at the end.

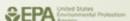
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MOSIER DERAILMENT

UNIQUE RESPONSE, UNIQUE EU

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Environmental Unit -- Overview

Mosier Incident Summary PSC

Friday, June 3, 12:30 pm, a west-bound Union Pacific 96-car unit train carrying Bakken crude derailed in Mosier, Oregon. 16 cars came off the tracks. The tracks were ~100 yards from the Columbia River. Three of the rail cars caught fire (correction from earlier reports of 4 on fire). 15 fire departments responded from OR and WA. After cooling the rail fire overnight with water, the fire was extinguished at 2:05 a.m. Saturday, June 4.

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Mosier EU Tasks PSC

► Day 1-2

- ID booming locations
- ID critical resources
- Environmental Assessment Plans
- *Community Air Monitoring?*



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Mosier EU Tasks PSC

► Day 3-6

- Cultural Resource Monitoring
- Soil Excavation Plan
- Water Sampling Technique for salmon concerns
- Consultation with resource trustees



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Environmental Unit -- Overview

Plans from EU forced true unity of command. PSC



Mosier Derailment:
Briefing out Community Air Monitoring Plan at C&GS Mtg.

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28

Always a Unique EU Role

- ▶ Menu of potential roles is long
- ▶ Any science inserted into ICP likely comes through EU



29

PSC Role in ENVL Success

 PSC

- ▶ Fight for a qualified ENVL. Don't be fooled by location on the org chart.
- ▶ Assist in creation of effective coordination between Ops and ENV.
- ▶ Support ENVL with staffing and logistical needs.
- ▶ Run interference for ENVL with difficult political issues.
- ▶ Other ideas or examples of EUs?

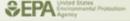
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30

Environmental Unit -- Overview

PSC Course Agenda - 2017 PSC

▶ Introduction (you are here)	▶ Facilitating a Tactics Meeting
▶ ICS Overview	▶ Overview of the ENVL Position
▶ Planning Section Overview	▶ Facilitating a Planning Meeting
▶ PSC Interactions (Quiz)	▶ ICS Forms (see below)
▶ Planning Cycle (Quiz)	▶ Example IAP Review
▶ Overview of SITL	▶ Strategies and Strategic Planning (Quiz)
▶ Meeting Facilitation Skills	▶ Facilitating an Ops Briefing
▶ Facilitating an Initial Unified Command Meeting	▶ Information Gathering (Quiz)
▶ Overview of RESL	▶ Documentation Unit Overview
▶ RESL Issues	▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
▶ Facilitating the C&GS Meeting	▶ Demobilization and Transition Plans
▶ Pre-Tactics Preparation Discussion	▶ OPS Briefing Practice

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Facilitating a Planning Meeting

PSC Course Agenda - 2017

- Introduction (you are here)
- ICS Overview
- Planning Section Overview
- PSC Interactions (Quiz)
- Planning Cycle (Quiz)
- Overview of SITL
- Meeting Facilitation Skills
- Facilitating an Initial Unified Command Meeting
- Overview of RESL
- RESL Issues
- Facilitating the C&GS Meeting
- Pre-Tactics Preparation Discussion
- Facilitating a Tactics Meeting
- Overview of the ENVL Position
- Facilitating a Planning Meeting**
- ICS Forms (see below)
- Example IAP Review
- Strategies and Strategic Planning (Quiz)
- Facilitating an Ops Briefing
- Information Gathering (Quiz)
- Documentation Unit Overview
- PSC Toolbox/Go Kit (Quiz – includes all-module review)
- Demobilization and Transition Plans
- OPS Briefing Practice

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Unit 10

Facilitating a Planning Meeting

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Conducting the Planning Meeting

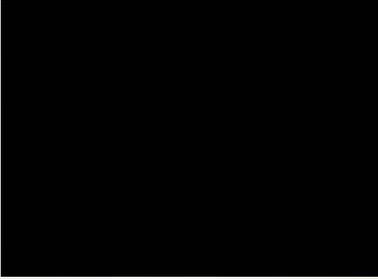
Purpose:
Present plan for IC/UC approval

The diagram illustrates the Operational Period Planning Cycle. It is a vertical flowchart with stages: INCIDENT / EVENT, NOTIFICATIONS, INITIAL RESPONSE AND ASSESSMENT, INCIDENT BRIEF ICS-201-EPA FORM, INITIAL ICS MEETING, IC/UC DEVELOPS / SETS OBJECTIVES / MEETING, COMMAND & GENERAL STAFF MEETING, PREPARING FOR THE TACTICS MEETING, TACTICS MEETING, EXECUTE PLAN & ASSESS PROGRESS, NEW OPS PERIOD BEGINS, OPERATIONS BRIEFING, IAP PREP & APPROVAL, PLANNING FOR THE PLANNING MEETING, and PLANNING MEETING. A red box highlights the 'PLANNING MEETING' stage. An arrow labeled 'Initial Response' points upwards through the first four stages.

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Facilitating a Planning Meeting

Planning Process



Planning Meeting

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Conducting the Planning Meeting

- ▶ All participants must come **PREPARED**
- ▶ Strong leadership must be evident
- ▶ Agency representatives must be able to commit their agencies
- ▶ Adhere to the Planning Process
- ▶ No radios/cell phones/side talking



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Conducting the Planning Meeting

- ▶ Always start **on time**
- ▶ Always give **ground rules**
- ▶ Always display **command presence**
- ▶ Keep to **30 minutes** or less
- ▶ Always use **timesavers**
- ▶ Touch base with all concerned
- ▶ **FOCUS** on product – why are we here?

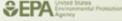


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Conducting the Planning Meeting

- ▶ Have involved folks **up front**
- ▶ Discuss their roles before the meeting
- ▶ Command presence – but not starchy!
- ▶ Keep on track – arrange "after" meetings
- ▶ Know who will speak
- ▶ **NO** dead air time



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Standard Display for Planning Meeting

USFS Example



8

Standard Display for Planning Meeting



9

Standard Display for Planning Meeting
(2010 EPA Example)



Enbridge – ICP
EPA Region 5
Note: Go Kit items



PSC

10

Standard Display for Planning Meeting
(2013 EPA Example)



SITL providing Weather Update & Situation Update with OPS
Note: FlexViewer



PSC

11

Standard Display for Planning Meeting
(2013 EPA Example)



Vinyl Chloride



ENVL summarizing air model. Supports OPS plan

PSC

12

Facilitating a Planning Meeting

Ten-Step Planning Meeting Checklist		PSC
1. Set or reaffirm incident objectives	IC	
2. Current situation and resource briefing	PSC, SITL, RESL	
3. Primary and alternative strategies	OPS	
4. Designate boundaries and functions	OPS	
5. Describe tactical operations	OPS, SO	

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Ten-Step Planning Meeting Checklist		PSC
6. Make tactical assignments	OPS, PSC	
7. Specify reporting locations and times	OPS, LSC	
8. Develop resources order	PSC, LSC	
9. Consider additional support requirements	LSC, PSC	
10. Finalize, approve, and develop the plan	PSC, IC	

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Facilitating a Planning Meeting

Planning Meeting Agenda

24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700)

Intro/OPs Period/cell phones	PSC
Org Chart	PSC
Incident Objectives	PSC
Situation/ Update	SITL
Weather	PSC
OPs Plan (215)	OPS
Safety	SO
Team Consensus (FSC/LSC/SO/LNO/IO/UC)	Staff
Schedule Highlights	PSC
Closing Remarks	UC

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The Operational Planning "P"

ICS Notes:
EPA Staff List – Due
Demob List
Transition Team

SR | EPA | 17

Planning Meeting Agenda

24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700)

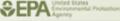
Intro/OPs Period/cell phones	PSC
Org Chart	PSC
Incident Objectives	PSC
Situation/ Update	SITL
Weather	PSC
OPs Plan (215)	OPS
Safety	SO
Team Consensus (FSC/LSC/SO/LNO/IO/UC)	Staff
Schedule Highlights	PSC
Closing Remarks	UC

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Facilitating a Planning Meeting

Planning Meeting Agenda
 24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700) PSC

▶ Intro/OPs Period/cell phones	PSC
▶ Org Chart	PSC
▶ Incident Objectives	PSC
▶ Situation/ Update	SITL
▶ Weather	PSC
▶ OPs Plan (215)	OPS
▶ Safety	SO
▶ Team Consensus (FSC/LSC/SO/LNO/IO/UC)	Staff
▶ Schedule Highlights	PSC
▶ Closing Remarks	UC

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Incident Objectives (202)
 24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700) PSC

- ▶ Ensure health and safety of the public and response & recovery personnel
- ▶ Maintain the isolation of Talmadge Creek and Kalamazoo River from the source area
- ▶ Contain and recover oil and contaminated vegetation in Talmadge Creek and Kalamazoo River
- ▶ Maintain effective unified communications with cooperating & assisting agencies and the public
- ▶ Perform remediation & restoration of all affected public & private areas of river & river systems
- ▶ Provide protection of environmentally and culturally sensitive areas including wildlife and historic properties
- ▶ **Protect threatened and endangered species & continue to recover & rehabilitate injured wildlife**
- ▶ Maintain Joint Information Center function
- ▶ Continue to collect, coordinate, manage and communicate environmental and public health data
- ▶ Obtain input from multi-agency Science Team to help establish protocols to guide cleanup of environmentally impacted areas

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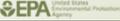
Command Emphasis (202)
 24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700) PSC

Command Emphasis

- ▶ Enbridge to assume primary responsibility for planning cycle and IAP development by 8/16/10
 - Continue transition of EPA logistics/procurement functions to Enbridge
 - Continue transition of IAP development from EPA to Enbridge
 - Monitor effectiveness of IAP briefing and use by Operations.
- ▶ Concentrate resources for river, shore, and floodplain cleanup and sheen management in Division C
- ▶ Review SCAT recommendations with Science Team, with emphasis on Division C, to coordinate near term cleanup efforts
- ▶ Continue efforts to remove oil and contaminated soil from pipeline release zone.
- ▶ Re-evaluate and enhance current continuous comprehensive on-water analytical sheen and subsurface monitoring, sediment investigation, reporting, control and recovery at Morrow Lake
- ▶ Continue to monitor overall effectiveness of community outreach
- ▶ **Science team, SCAT team and Unified Command visitation of work areas in Divisions A, B, and C**

Safety Objectives for Operational Period

- ▶ Continue industrial hygiene evaluations at release site
- ▶ Continue safety management through on-going discussions with OSHA and MIOSHA on safety practices and oversight associated with site operations
- ▶ Continue increased safety and health presence and oversight in Division C
- ▶ Increase awareness and monitoring for signs of heat related fatigue and illnesses

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Facilitating a Planning Meeting

Planning Meeting Agenda

24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700)

▶ Intro/OPs Period/cell phones	PSC
▶ Org Chart	PSC
▶ Incident Objectives	PSC
▶ Situation/Update	SITL
▪ Situation Update (SITL)	
▪ Update on Current Operations (OPS)	
▶ Weather	PSC
▶ OPs Plan (215)	OPS
▶ Safety	SO
▶ Team Consensus (FSC/LSC/SO/LNO/IO/UC)	Staff
▶ Schedule Highlights	PSC
▶ Closing Remarks	UC

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Planning Meeting Agenda

24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700)

▶ Intro/OPs Period/cell phones	PSC
▶ Org Chart	PSC
▶ Incident Objectives	PSC
▶ Situation/Update	SITL
▶ Weather	NOAA
▶ OPs Plan (215)	OPS
▶ Safety	SO
▶ Team Consensus (FSC/LSC/SO/LNO/IO/UC)	Staff
▶ Schedule Highlights	PSC
▶ Closing Remarks	UC

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Forecast for Monday, August 16

Time	Temp	Humidity	Wind
04:00	57°	73%	11 to 13
07:00	52°	85%	14 to 17
10:00	57°	43%	15 to 24
13:00	49°	30%	17 to 24
16:00	77°	48%	14 to 18
19:00	52°	68%	7 to 11
22:00	51°	53%	7 to 11
01:00	52°	72%	14 to 18

Dry and cooler with temperatures slightly below normal. Breezy in the afternoon.
Maximum heat index values: 80 to 83

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Facilitating a Planning Meeting

Planning Meeting Agenda

24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700)

Intro/OPs Period/cell phones	PSC
Org Chart	PSC
Incident Objectives	PSC
Situation/ Update	SITL
Weather	PSC
OPs Plan (215)	OPS
Safety	SO
Team Consensus (FSC/LSC/SO/LNO/PIO/UC)	Staff
Schedule Highlights	PSC
Closing Remarks	UC

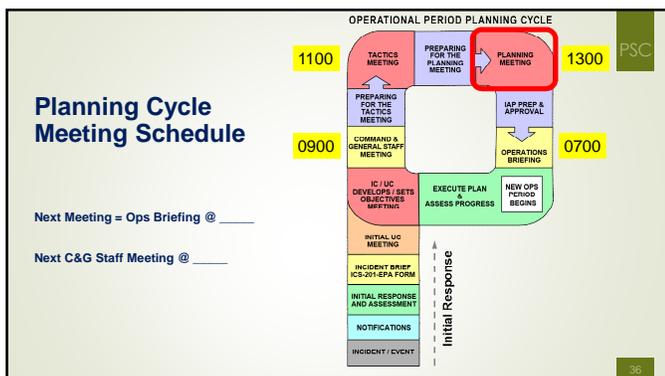
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Planning Meeting Agenda

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Team Consensus (FSC/LSC/SO/LNO/PIO/UC)	Staff
Schedule Highlights	PSC
Ops Briefing @	PSC
Next C&GS Staff Meeting @	PSC
Closing Remarks	UC

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Facilitating a Planning Meeting

JANUARY 2016 **IAP Components** PSC

Components of an IAP (use as pertinent)	Primary Responsibility
1. Incident Objectives (ICS 202 form)	Resource Unit
2. Organization List/Chart (ICS 203/207 forms)	Resource Unit
3. Assignment List (ICS 204 form)	Resource Unit
4. Communications Plan (ICS 205 form)	Communications Unit
5. Medical Plan (ICS 206 form)	Medical Unit
6. Incident Map	Situation Unit
7. Weather, tide forecast	Situation Unit
8. Safety Plan	Safety Officer
9. Decontamination Plan	Technical Specialist
10. Waste Management or Disposal Plan	Technical Specialist
11. Demobilization Plan	Demobilization Unit
12. Air Operations Summary (ICS 220 form)	Air Operations Branch Director
13. Traffic Plan	Ground Support Unit

Provide IAP Components to RESL by _____

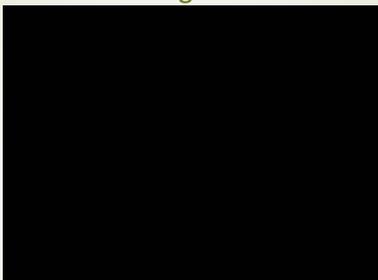
37

Planning Meeting Agenda
24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700) PSC

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Planning Process PSC



Planning Meeting

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Facilitating a Planning Meeting

PSC Course Agenda - 2017 PSC

▶ Introduction (you are here)	▶ Facilitating a Tactics Meeting
▶ ICS Overview	▶ Overview of the ENVL Position
▶ Planning Section Overview	▶ Facilitating a Planning Meeting
▶ PSC Interactions (Quiz)	▶ ICS Forms (see below)
▶ Planning Cycle (Quiz)	▶ Example IAP Review
▶ Overview of SITL	▶ Strategies and Strategic Planning (Quiz)
▶ Meeting Facilitation Skills	▶ Facilitating an Ops Briefing
▶ Facilitating an Initial Unified Command Meeting	▶ Information Gathering (Quiz)
▶ Overview of RESL	▶ Documentation Unit Overview
▶ RESL Issues	▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
▶ Facilitating the C&GS Meeting	▶ Demobilization and Transition Plans
▶ Pre-Tactics Preparation Discussion	▶ OPS Briefing Practice

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PSC Course Agenda - 2017 PSC

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- Facilitating an Initial Unified Command Meeting
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- RESL Issues
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- ICS Forms (see below)**
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- OPS Briefing Practice

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Unit 11
Incident Action Plan
ICS Forms

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Incident Action Plan/ICS Forms PSC

OPERATIONAL PERIOD PLANNING CYCLE

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Incident Action Plan/ICS Forms PSC

- ▶ Incidents will vary in size and complexity – so will your IAP
- ▶ The IAP is generated from the planning process and is the guide to accomplishing the objectives
- ▶ IAP's must be as accurate as possible and complete enough to be the guide for operations
- ▶ The first IAP on any assignment isn't the best, but you should try to make it that way
- ▶ An IAP may not need every component

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In General, an Incident Requires a Written Incident Action Plan When: PSC

- ▶ 1. The response involves a large number of resources
- ▶ 2. The incident exceeds one operational period
- ▶ 3. The incident requires a regional response organization
- ▶ 4. An IAP is requested by the Incident Commander
- ▶ 5. An IAP is required by an Agency

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Purpose of the IAP PSC

- 1. Safety of personnel**
- 2. Effectiveness of response operations**

- ▶ Provides operational direction for incident personnel (who, what, when, where, how)
- ▶ Provides objectives and a sequence of events to meet those objectives
- ▶ Communications tool
- ▶ Formal chronological diary

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ICS 205a

ICS 205a

PSC

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119

ICS 206

ICS 206

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20

ICS 206

ICS 206

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21

Traffic Plan Map

Traffic Safety Alert for Parking at ICF, 1801 Pratt Avenue

- This report was developed in 2011.
- There is only limited parking for ICF employees and pedestrian traffic. Watch vehicle speeds.
- Due to the proximity to the ICF facilities and offices, only call for assistance at the back entrance.
- Transport materials to the Security Check Point as shown at the back entrance.

See Section 10.0 of the ICF, 1801 Pratt Avenue Site Plan.

Prepared by: Susan Davis, Safety & Security Specialist | 1/17/17 | 25

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Transportation Map

Legend

- Military Bases
- Airport
- Seaport
- Primary Highway
- Secondary Highway
- Interstate
- Park
- County Boundary

Locator Map

26

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Additional Components of the IAP

- ▶ Predictions / assessments / analyses
- ▶ Weather Forecast
- ▶ ICS Form 220 Air Operations Summary Worksheet
- ▶ Human Resource Message
- ▶ Other blank forms as needed

27

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Make Sure You . . . PSC

- ▶ Identify **WHO** is responsible to develop **which** IAP components
- ▶ Identify and communicate **WHEN** they are due
- ▶ Identify **WHO** should receive the completed components
- ▶ **You** should Review each component for accuracy and clarity

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Make Sure You . . . PSC

- ▶ Assemble and then complete another final review of the completed IAP
- ▶ Obtain the IC's approval of the plan
- ▶ Arrange for Duplication
- ▶ Determine the number of IAPs needed



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PSC Course Agenda - 2017 PSC

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- ▶ OPS Briefing Practice

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Unit 15
Planning Section Chief
Strategies and Strategic Planning

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Unit Objectives – Strategies PSC

- ▶ Define the difference between strategy and tactics.
- ▶ Identify who is responsible for formulating the strategy and who is responsible for monitoring it.
- ▶ Identify who is responsible for formulating tactics.

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Unit Objectives – Strategies PSC

- ▶ List four sources of input that could be used to evaluate the strategy.
- ▶ Explore the need for Strategic Planning on lengthy responses
- ▶ Specialty Plans

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Strategy PSC

- ▶ The **general concept, plan, or course of action** selected to accomplish incident objectives
- ▶ Tells us **HOW** to achieve
- ▶ Flexibility in objectives allows for generation of multiple strategies . . . more options to choose from

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Examples of Strategies PSC

Objective: Prevent contamination in town and reduce the reservoir level 35 ft. by 0800 tomorrow so it can hold the contaminated inflow.

- ▶ Strategy #1: Reduce or divert clean inflow
- ▶ Strategy #2: Open spillways
- ▶ Strategy #3: Use pumps

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Strategy Versus Tactics

Strategy: The **general "plan," concept or direction** selected to accomplish incident objectives.

Tactics: Short-term, **site-specific actions**. Deploying resources to accomplish objectives.

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Tactic

- ▶ Deploying and employing resources while executing a strategy to achieve an objective
- ▶ Tells us the **"WHO, WHAT Equipment, WHERE to do it, WHEN to do it."**



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Examples of Tactics

Strategy: Use pumps

Tactics: Use truck-mounted pumps working from the road on north side discharging into spillway

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ACTIVITY!! PSC

- ▶ For each Objective please create:
 - 2 Strategies
 - 4 Tactics
- ▶ *Objective 1: Increase light in the living room.*
- ▶ *Objective 2: Minimize stress in your workplace.*
- ▶ *Bonus! Make up your own.*

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Who is Responsible? PSC

```
graph LR; UC[UC] --> PSCOPS[PSC/OPS]; PSCOPS --> OPS[OPS]; UC --- UC_obj["• Objectives  
• ICS 202"]; PSCOPS --- PSCOPS_strat["• Strategies  
• ICS 234"]; OPS --- OPS_tact["• Tactics  
• ICS 215"]
```

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Considerations of Initial Strategy PSC

- ▶ Chemical and physical properties of involved material
- ▶ Safety considerations
- ▶ Environmental concerns
- ▶ Property, infrastructure, public health, economic and natural resources to be protected

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Considerations of Initial Strategy PSC

- ▶ Availability and cost of resources (contractors)
- ▶ Current and predicted environmental conditions (weather)
- ▶ Available alternatives
- ▶ Regulatory restrictions

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Considerations of Initial Strategy PSC

2 min War Story Moment:
Please describe an incident where unique realities determined what response strategies you used.

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Clarifying Questions PSC

?? Is information correct and current? ??

- Are the assumptions realistic?
- What alternatives were NOT selected?
- Why were they not selected?
- What conditions have changed? ??

??

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What Considerations Could Require a Change?

- ▶ Incident moves beyond projections
- ▶ Expense will exceed approval
- ▶ Resources or material not available
- ▶ New opportunity to change approach
- ▶ Change in political climate
- ▶ Any others?

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17

Who Can Suggest Modifications?

(Sources of Input)

1. Agency Exec./Administrator
2. Planning Section Chief
3. Operations Section Chief
4. Finance Section Chief
5. Logistics Section Chief
6. Safety Officer
7. Resource Advisor
8. Incident Commander

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18

Who Needs To Know?

Local governments
Cooperator
Land Owner
Media
Regional Incident Coordinator
USCG
All incident personnel

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Strategic Planner

- Anticipating several operational periods ahead
- Ramping up/ramping down
- Exit Plan/definition of complete

Must Have:

- Good project management skills and constant communication with other sections*

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Strategic Planning

Example: IC requests EPA to create strategic plan for Hurricane Response 30 and 90 days in future

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Strategic Planning PSC

Example:
DeepWater/BP
Response in 2010.
Strategic Planning
initiated at Day 45....5
phases. Led by PSC
from O'Briens Group.



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Specialty Plans PSC

- ▶ What do written plans do?
 - Enable true consensus among IMT
 - Provide consistency among responders
 - Reduce redundant work
- ▶ Typically written in response to planned repetitive tasks, outside influences or anticipated concerns

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Specialty Plans PSC

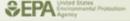
- ▶ Severe weather plan - Greensburg Tornado Response
- ▶ Mardi Gras Traffic Plan - Katrina
- ▶ Air contingency plan - Joplin
- ▶ Holiday staffing plans - most long responses
- ▶ Multiple Disaster Contingency Plan - Hurricane Sandy
- ▶ Residential re-entry plan - evacuation requirement
- ▶ VIP Tour plans - most political responses
- ▶ Secondary Release Plan - Gold King Mine
- ▶ Discovery of cultural resources plan - Mosier Derailment
- ▶ Etc. - every response has a unique need

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Unit Summary – Strategies PSC

Are you now able to?:

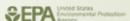
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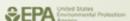
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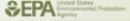
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Unit Quiz PSC

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Facilitating an Operations Briefing

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PSC

Unit 16

Facilitating an Ops Briefing

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Operations Briefing PSC

The operations briefing:

- ▶ Is conducted at the beginning of each operational period
- ▶ Presents the IAP to supervisors of tactical resources
- ▶ Should be concise
- ▶ 20-30 min

Example:
Ops Briefing = 0700

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Facilitating an Operations Briefing

Planning Process PSC



Operational Period Briefing

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Conducting the Operational Briefing PSC

- ▶ **Select Briefing Time**
 - Prior to any operational period
 - Plan for 30 minutes
 - Plan for travel time
- ▶ **Who should attend?**
 - Supervisors & Ops personnel
- ▶ **Select Briefing location**
 - Large enough
 - Quiet enough
 - Audio system
 - Capable of displays, projection, etc.



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Conducting the Operational Briefing PSC

- ▶ **Post Time and Location**
- ▶ **Notify Command and General Staff**
- ▶ **Make sure Planning Section Units are preparing their displays**
- ▶ **Determine Briefing Agenda**
- ▶ **Make sure your team is on the same page as you are**



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Conducting the Operational Briefing PSC

- ▶ Hand out IAPs prior to start
- ▶ Display presentation and facilitation skills
- ▶ Keep focused, crisp, rapid, and remain professional
- ▶ Make sure someone is keeping a "red pencil" copy of the plan during the briefing



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Conducting the Operational Briefing PSC

- ▶ Arrange for "after briefing" meetings if necessary
- ▶ Arrange for a location for confused, unassigned, and lost resources to meet with a representative from Operations or Plans
- ▶ Use the phrase "on page...." to walk thru IAP



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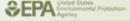
Operations Briefing Agenda PSC

- ▶ **Intro / Ground Rules / Time Frame / Ops Period** PSC
- ▶ Incident Objectives PSC
- ▶ Current Situation Update SITL/OPS
- ▶ Weather Forecast SITL
- ▶ Ops Org Chart OPS
- ▶ Ops Assignments (204) OPS
- ▶ Div/Grp Sup Mtg Note OPS
- ▶ Safety Briefing SO
- ▶ Logistics Update LSC
- ▶ Finance Issues FSC
- ▶ Information Issues PIO
- ▶ Interagency Issues LNO
- ▶ Next Ops Briefing @ _____ PSC
- ▶ Closing Comments IC

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Operations Briefing Agenda

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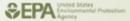
1. Incident Name:	2. Operational Period (Date/Time):	ICS 202: Incident Objectives
LA Hurricane Response	From: 0700 13 Dec 05 To: 0700 17 Dec 05	ICS 202-EPA
3. Objectives:		
<ol style="list-style-type: none"> 1) Ensure health and safety of the public and responders by identifying and conducting environmental assessments, controlling hazards, and conducting operations in accordance with the approved site safety and quality assurance sampling plans. 2) Conduct aggressive air, ground and water monitoring and investigation activities to identify active and potential pollution targets, as well as confirm extent of hurricane damage to oil and chemical facilities and critical infrastructure. 3) Rapidly control, contain and mitigate all sources of pollution threatening or impacting public health and the environment inland, and within the commercially navigable waterways, in accordance with the memorandum signed by USCG and EPA delineating FOSC responsibilities (dated 2 Oct 05, amended 13 Oct 05). 4) Remove household hazardous waste and debris from impacted communities in close coordination with affected stakeholders. 5) Properly characterize and dispose of all hazardous materials in an efficient and effective manner, with all appropriate documentation. 6) Minimize wildlife/domestic animal impacts. Coordinate rehabilitation of affected animals and recovery of deceased wildlife. 7) Manage a coordinated response effort with local, state, federal and industry partners and ensure adherence to policies, practices and plans, of all participating agencies. 8) Assure that all stakeholders are informed of response activities and enhance proactive media and community outreach programs. 9) Accurately document ESF #10 response actions and ensure it is captured in appropriate official repositories. 10) Manage a financial system that ensures accurate, efficient and effective accounting of resources; continually monitor ESF #10 funds and adjust operations as needed. 		

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Incident Objectives (202)

24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700)

- ▶ Ensure health and safety of the public and response & recovery personnel
- ▶ Maintain the isolation of Talmadge Creek and Kalamazoo River from the source area
- ▶ Contain and recover oil and contaminated vegetation in Talmadge Creek and Kalamazoo River
- ▶ Maintain effective unified communications with cooperating & assisting agencies and the public
- ▶ Perform remediation & restoration of all affected public & private areas of river & river systems
- ▶ Provide protection of environmentally and culturally sensitive areas including wildlife and historic properties
- ▶ **Protect threatened and endangered species & continue to recover & rehabilitate injured wildlife**
- ▶ Maintain Joint Information Center function
- ▶ Continue to collect, coordinate, manage and communicate environmental and public health data
- ▶ Obtain input from multi-agency Science Team to help establish protocols to guide cleanup of environmentally impacted areas

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Facilitating an Operations Briefing

Command Emphasis (202)

24-Hour Operational Period: Aug 16 (0700) – Aug 17 (0700)

Command Emphasis

- Enbridge to assume primary responsibility for planning cycle and IAP development by 8/16/10
 - Continue transition of EPA logistics/procurement functions to Enbridge
 - Continue transition of IAP development from ENR to Enbridge
 - Monitor effectiveness of IAP briefing and use by Operations.
- Concentrate resources for river, shore, and floodplain cleanup and sheen management in Division C
- Review SCAT recommendations with Science Team, with emphasis on Division C, to coordinate near term cleanup efforts
- Continue efforts to remove oil and contaminated soil from pipeline release zone.
- Re-evaluate and enhance current continuous comprehensive on-water analytical sheen and subsurface monitoring, sediment investigation, reporting, control and recovery at Morrow Lake
- Continue to monitor overall effectiveness of community outreach
- Science team, SCAT team and Unified Command visitation of work areas in Divisions A, B, and C

Safety Objectives for Operational Period

- Continue industrial hygiene evaluations at release site
- Continue safety management through on-going discussions with OSHA and MIOSHA on safety practices and oversight associated with site operations
- Continue increased safety and health presence and oversight in Division C
- Increase awareness and monitoring for signs of heat related fatigue and illnesses

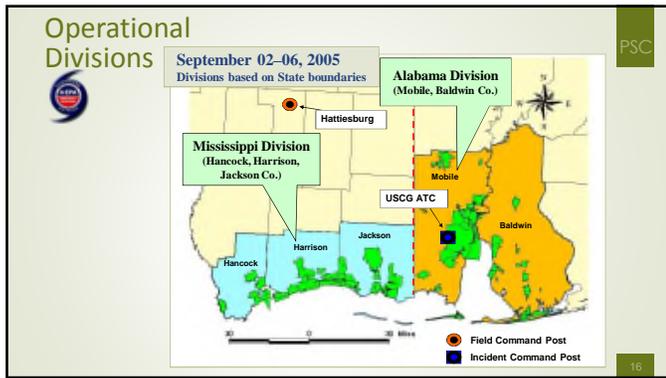
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Operations Briefing Agenda

Intro / Ground Rules / Time Frame / Ops Period	PSC
Incident Objectives	PSC
Current Situation Update	SITL/OPS
Situation Update (SITL)	
Current Response Actions / Accomplishments (OPS)	
Weather Forecast	SITL
Ops Org Chart	OPS
Ops Assignments (204)	OPS
Div/Grp Sup Mtg Note	OPS
Safety Briefing	SO
Logistics Update	LSC
Finance Issues	FSC
Information Issues	PIO
Interagency Issues	LNO
Next Ops Briefing @ _____	PSC
Closing Comments	IC

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Operations Briefing Agenda

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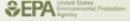
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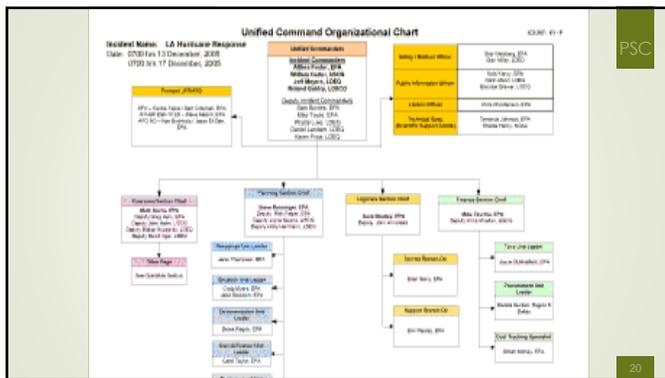
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Operations Briefing Agenda

- ▶ Intro / Ground Rules / Time Frame / Ops Period PSC
- ▶ Incident Objectives PSC
- ▶ Current Situation Update SITL/OPS
- ▶ Weather Forecast SITL
- ▶ Ops Org Chart OPS
- ▶ Ops Assignments (204) OPS
- ▶ Div/Grp Sup Mtg Note OPS
- ▶ Safety Briefing SO
- ▶ Logistics Update LSC
- ▶ Finance Issues FSC
- ▶ Information Issues PIO
- ▶ Interagency Issues LNO
- ▶ Next Ops Briefing @ _____ PSC
- ▶ Closing Comments IC

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Operations Briefing Agenda

- ▶ Intro / Ground Rules / Time Frame / Ops Period PSC
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- ▶ Closing Comments IC

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Facilitating an Operations Briefing

ICS 204
PSC

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EPA
22

Operations Briefing Agenda
PSC

- ▶ Intro / Ground Rules / Time Frame / Ops Period PSC
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Operations Briefing Agenda
PSC

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Facilitating an Operations Briefing

Operations Briefing Agenda

▶ Intro / Ground Rules / Time Frame / Ops Period	PSC
▶ Incident Objectives	PSC
▶ Current Situation Update	SITL/OPS
▶ Weather Forecast	SITL
▶ Ops Org Chart	OPS
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Operations Briefing Agenda

▶ Intro / Ground Rules / Time Frame / Ops Period	PSC
▶ Incident Objectives	PSC
▶ Current Situation Update	SITL/OPS
▶ Weather Forecast	SITL
▶ Ops Org Chart	OPS
▶ Ops Assignments (204)	OPS
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▶ Closing Comments	IC

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Operations Briefing Agenda

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▶ Incident Objectives	PSC
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▶ Ops Org Chart	OPS
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Facilitating an Operations Briefing

Operations Briefing Agenda

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Operations Briefing Agenda

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▶ Incident Objectives	PSC
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▶ Ops Org Chart	OPS
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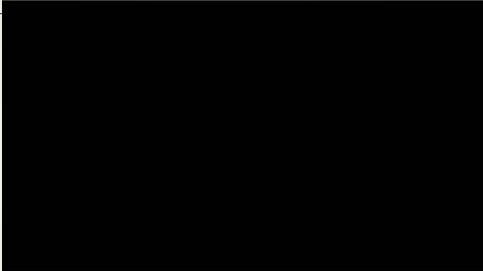
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Operations Briefing Agenda

▶ Intro / Ground Rules / Time Frame / Ops Period	PSC
▶ Incident Objectives	PSC
▶ Current Situation Update	SITL/OPS
▶ Weather Forecast	SITL
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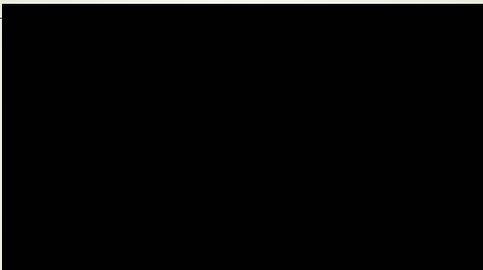
Planning Process



Enbridge Operational Period Briefing Example 1

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Planning Process



Enbridge Operational Period Briefing Example 2

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PSC Course Agenda - 2017

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Tactics Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
- ▶ Facilitating a Planning Meeting
- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ **Information Gathering (Quiz)**
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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PSC Course Agenda - 2017 PSC

- ▶ Introduction (you are here)
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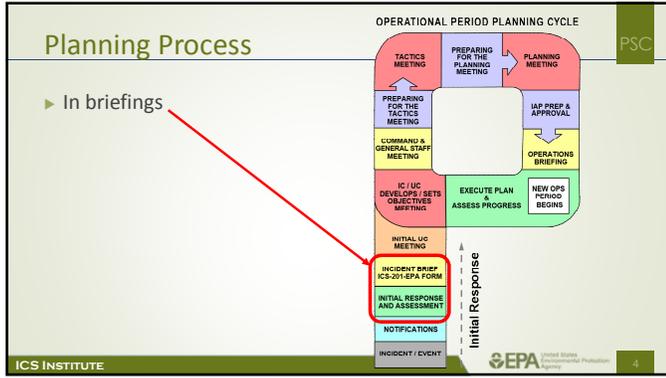
Unit 17a
Planning Section Chief
Information Gathering

ICS INSTITUTE EPA United States Environmental Protection Agency 2

Unit Objectives - Information Gathering PSC

- ▶ List six key documents that the Planning Section Chief (PSC) should obtain at the transition briefings.
- ▶ Describe items of information that the PSC will receive from the Incident Commander's (IC) team briefing.
- ▶ Describe the ongoing information and evaluation process of the Planning Section throughout the incident.

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Transition Briefings

- ▶ 3 Types
 - ✓ RIC
 - ✓ Initial I.C.
 - ✓ Current IMT
- ▶ Should get two of them prior to assuming management
- ▶ May be done at same time

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5

Information from Transition Briefings

- ▶ Incident's history and current status
- ▶ Command structure (PRP?)
- ▶ Magnitude, potential, and estimated duration
- ▶ Political, environmental, and economic constraints
- ▶ Current plan, priorities, and objectives
- ▶ Status of communications

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Initial I.C. or Current Team Briefing

PSC

- ▶ Should have one or the other
- ▶ Will have specifics
- ▶ Will know resources



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Six Key Documents

PSC

- ▶ ICS 201 - Incident Briefing Form
- ▶ ICS Form 209 / SITREP
- ▶ Delegation of Authority/Letter of Direction/Mission Assignment
- ▶ Incident intelligence data
- ▶ Current IAP
- ▶ Interagency Agreement/Decision Memo/Memorandum of Understanding

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Transition Plan Comments

PSC

- ▶ PSC Issues:
 - Section's need for space at Camp Jefferson
 - The environmental and resources units need to rejoin the remaining portions of the Planning section Computer and technical needs- wireless Phones(for the office space) and radios (Field Observers)
 - Technical support from NDAA need to be included with situation unit
- ▶ Typical routine responsibilities:
 - Operational Briefing
 - Command and General Staff Meeting
 - Produce a 203 for the Planning Meeting
 - Tactics Meeting
 - Planning Meeting
 - Sign the IAP and review Sitrep
- ▶ IAP:
 - Resource 204 and updates and accurately reported
 - Posting on webIDC. Katrina response on the region 6's website
- ▶ Situation Unit:
 - Field Observers to ground truth operational information and provide intel to the planning section.
 - Post the sitrep
 - Support environmental unit's need for maps and other technical assistance (GIS and IT)
- ▶ Environmental Unit:
 - Continue support to operation
 - Provide scientific support to IMT, specifically the operation section
 - QA/QC sample results
 - Provide sampling plans
 - Provide the QAPP
 - Make determinations of sampling needs and points to sample
- ▶ Documentation unit:
 - Provide 203 for the IAP
 - Provide filing procedure and provide the serve of filing
 - Scanning of all documents being produced



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Ongoing information and evaluation process of the Planning Section

Regional Incident Coordination

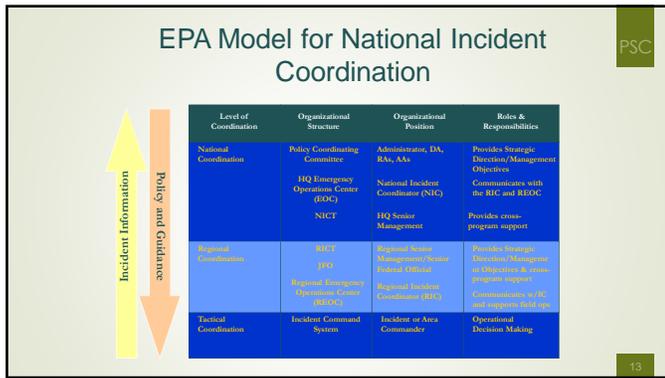
Acknowledge the reality, we all have a boss

- ▶ Primary point-of-contact with Incident and Area Commander
- ▶ Provides strategic/management objectives and oversight to IMT and Area Command
- ▶ Provides clarification of regional policy issues
- ▶ Ensures effective and timely communication flow between field activities and upper level management

Source: Incident Management for Executives

Regional Emergency Operations Center (REOC)

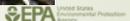
- ▶ Managed by Removal Manager or designee
- ▶ Provide immediate “reach back” to support to the Incident Management Team
- ▶ Coordinates FEMA/ NRF/ ESF activities
- ▶ REOC assigns/ coordinates agency resources deployment to the incidents



Planning Section Chief

Responsible for the collection, evaluation, dissemination, and use of information about the development of the incident and the status of assigned resources.

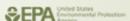


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Planning Section Chief

- ▶ Status of information acquisition duties
 - Information requirements and reporting schedules adequate?
 - Specialized resources in support of the incident needed?
 - Are special information collection activities necessary, e.g., weather, environmental, toxics, etc?



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Planning Section Chief

- ▶ Activate or deactivate units?
- ▶ Order, replace, or demobilize personnel?
- ▶ Compares strategy against objectives
- ▶ Gather and assemble data on alternative strategies
- ▶ Evaluates how the section is doing

Evaluation

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Resource Unit Leader

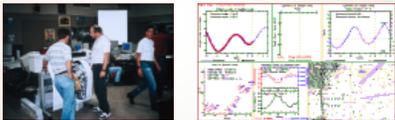
- ▶ Ensures completion of check in function (ICS 211)
- ▶ Maintains resource status tracking system for safety purposes
- ▶ Prepares resource summaries (SITREP and 215)
- ▶ Collaborates with the OPS in preparing the resource assignments (ICS 203, 204, 207, and 215)



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Situation Unit Leader

- ▶ Provides incident driven intelligence and supporting displays/maps
- ▶ Tracks perimeter, progression, impacts, zones, boundaries, etc.
- ▶ Acquires data and coordinates analysis for use by the OSC
- ▶ Coordinates off-site situation reports



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Environmental Unit Leader

PSC

- ▶ Reviews and evaluates the science used to make decisions regarding protection of public health, welfare, and the environment
- ▶ Reviews and evaluates the science used to make decisions regarding protection of public health, welfare, and the environment
- ▶ Evaluates environmental tradeoffs and economic impacts for significant response actions.
- ▶ Evaluates data; providing interpretation of evaluated data to the IC and IMT for response and public health



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Documentation Unit Leader

PSC

- ▶ Assembles, organizes, and secures records of events, decisions, and working incident information
- ▶ Collects materials from all sections



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Demobilization Unit Leader

PSC

- ▶ Ensures timely and safe release of resources and equipment from incident
- ▶ Assists in monitoring resources for compliance with contractual milestones
- ▶ Provides for emergency personnel releases due to family emergencies

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Review Objectives - Information Gathering PSC

- ▶ List six key documents that the Planning Section Chief (PSC) should obtain at the transition briefings.
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PSC

Unit Quiz

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PSC Course Agenda - 2017 PSC

- ▶ Introduction (you are here)
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- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ **Documentation Unit Overview**
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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PSC

Unit 17b

Planning Section Chief

ICS within different frameworks

"Fit ICS to the response, don't fit the response to ICS"
- John Martin's guru

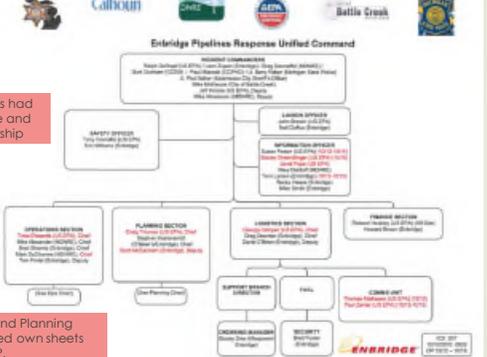
ICS INSTITUTE
EPA United States Environmental Protection Agency
1



PSC

Large Fund Lead Response: Kalamazoo River

2

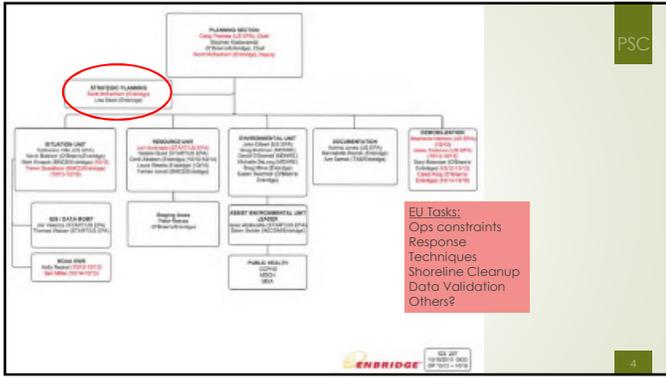


PSC

Many KLPs had Fed, State and RP leadership

Ops and Planning needed own sheets for IAP.

3







**Stafford Act:
Hurricane Sandy**
Mission: Disposal and WWTPs

ICS INSTITUTE EPA

ICS 207: Sandy (Non-Ops)

NY and NJ each had a Dep. IC/ Ops Chief

Liaison to FEMA JFOs

Modest EU, minimal issues

Resources only for EPA staffing, IAP light

ERRS Contract Leads in Logs

ICS INSTITUTE PSC

ICS 207: Sandy (Ops)

Discussion Points:

- Operations planning was straight forward, and happened at the branch level.
- 204 generation by IMT = redundant paperwork, wasn't done.
- Sit Unit/Ops connection kept IMT aware of operational details.
- Was REOC actually an Area Command?

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**RP-Led Response:
Mosier Crude Train**

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Community air monitoring

Indicates EPA Staff
Indicates C.G, State and Tribal regulators

Other Regulatory Staff:
EU was staffed by 2 EPA, 6 STARTs, 4 State Regulators, 2 Tribal Reps and 2 archeologists.

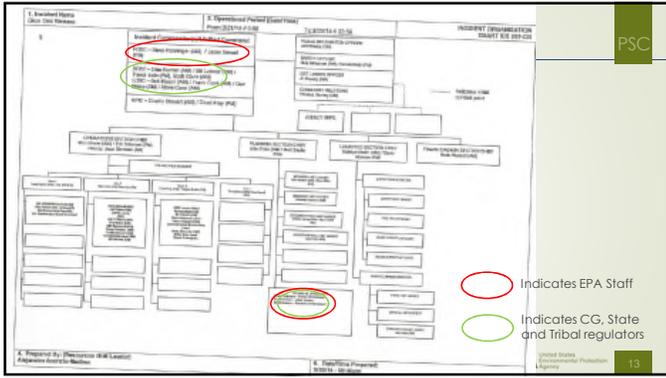
IMI:
Union Pacific RR brought in CTEH to be the IMI.

Challenge:
Maintaining chain of command when PSC doesn't have environmental background.

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**RP-Led Response:
Oak Glen Crude Pipeline Release**

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PSC Course Agenda - 2017 PSC

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- ▶ OPS Briefing Practice

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UNIT 16
Documentation Unit Overview
Adapted from U.S. EPA Region V START Training

PSC

2

Introduction PSC

Under the Incident Command System (ICS) organizational structure, the Documentation Unit (DU) is located within the Planning Section.

```
graph TD; IC[INCIDENT COMMAND] --- OS[OPERATIONS SECTION]; IC --- PS[PLANNING SECTION]; IC --- LS[LOGISTICS SECTION]; IC --- FS[FINANCE SECTION]; PS --- DU[Documentation Unit];
```

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Documentation Responsibilities PSC

- ▶ Maintenance of Incident Files
- ▶ Ensuring that Each Section is Maintaining and Providing Appropriate Documents to the DU
- ▶ Providing Duplication and Copying Services
- ▶ Storing Incident Files
- ▶ Collecting, Identifying, and Organizing All Records and/or Related Documentary Materials

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Establishing and Maintaining The Documentation Unit PSC

- ▶ Establish Working Relationships
- ▶ Establish Command Support
- ▶ Conduct a Site Tour
- ▶ Evaluate DU ICS Organization Structure
- ▶ Identify Document Originators

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Establishing and Maintaining The Documentation Unit PSC

- ▶ Establish Procedure for Assigning Unit Identifier Codes
- ▶ Establish Procedure for Collection of Documents
- ▶ Establish Procedure for Demobilization Document Collection
- ▶ Additional Duties

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Establishing and Maintaining The Documentation Unit PSC

- ▶ Establish Working Relationships
 - Report to the Planning Section Chief
 - Establish Contact with all Organizational Unit Leaders
 - Develop a Complete Understanding of Relationships
 - Policy Meetings

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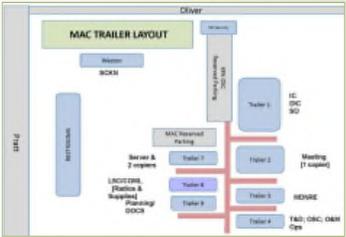
Establishing and Maintaining The Documentation Unit PSC

- ▶ Establish Command Support
 - Command Support
 - Complying with the Documentation Unit
 - Need for Documentation

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Establishing and Maintaining The Documentation Unit PSC

- ▶ Conduct a Site Tour
 - Incident Command Post and Any Remote Locations
 - ✓ Communicate with All Assigned Personnel



The diagram, titled 'MAC TRAILER LAYOUT', shows a top-down view of a trailer with a 'DRIVER' position at the top. The layout includes several units: 'Admin' (BCKH) at the front left; 'MAC Document Station' (BCKH) at the front center; 'Service & Supplies' (BCKH) at the front right; 'LADDER, EQUIPMENT, Planning' (BCKH) at the rear left; 'Trailer 1' (IC, ICS, SIG) at the rear center; 'Trailer 2' (Planning) at the rear right; 'Trailer 3' (Manning, 11 supplies) at the rear far right; 'Trailer 4' (IAD, CMC, O&M, Ops) at the rear far left; and 'Trailer 5' (REPAIR) at the rear center-right. A 'BCKH' unit is also located at the rear left.

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Establishing and Maintaining The Documentation Unit

PSC

- ▶ Evaluate DU ICS Organization Structure
 - Organizational Placement of the Documentation Unit
 - Incident of National Significance (INS)

```
graph TD; IO[Incident Officer] --- IC[INCIDENT COMMAND]; LO[LIAISON OFFICER] --- IC; DU[DOCUMENTATION UNIT] --- IC; IC --- OS[OPERATIONS SECTION]; IC --- PS[PLANNING SECTION]; IC --- LS[LOGISTICS SECTION]; IC --- FS[FINANCE SECTION];
```

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Establishing and Maintaining The Documentation Unit

PSC

- ▶ Identify Document Originators
 - Information Loops
 - Dynamic or Static Documents
 - Communication mechanisms
 - Collection Plan
 - Monitor Collection Loops
 - Coordinate with Other Agencies and Contractors

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Establishing and Maintaining The Documentation Unit

PSC

- ▶ Establish Procedure for Assigning Unit Identifier Codes (UICs)
 - Development of Organizational Chart
 - UIC Codes
 - Coordination and Creation of UIC Codes

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Establishing and Maintaining The Documentation Unit

Unified Command

- C000 RP
- C000 RPE
- C000 RPB
- C000 RPT
- C000 NRE
- C000 ACCOM
- C171
- C172
- C173
- C174
- C175
- C176
- C177
- C178
- C179
- C17A
- C17B
- C17C
- C17D
- C17E
- C17F
- C17G

Operations

- O000
- O00A
- O00B
- O00C
- O00D
- O00E
- O100
- O200
- O300
- O400
- O500
- O510
- O540
- O550
- O560
- O600
- O680
- O800
- O900
- O950

Finance

- F200
- F210
- F220
- F230
- L300
- L310
- L320
- L330
- L340
- L350
- L360
- L380
- F500
- F510
- F520
- F530
- F540
- F550
- F560
- F570
- F580

Logistics

SSSID: MS... UIC: (as shown below) **Marshall Oil Response** 11 0206

Command and Control Staff

Unified Area Command

Incident Commander

Operations Section

Planning Section

Safety Section

Logistics Section

Public Information Officer

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Establishing and Maintaining The Documentation Unit

- ▶ Establish Procedure for Assigning Unit Identifier Codes (UICs) – Continued
 - New Personnel
 - Standard Naming Convention
 - Email Correspondence

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Establishing and Maintaining The Documentation Unit

- ▶ Establish Procedure for Collection of Documents
 - Litigation Holds
 - Documentation Checklist
 - Collecting Documents
 - Establishing Collection of Documents
 - Processing Documentation
 - Email boxes

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Establishing and Maintaining The Documentation Unit PSC

- ▶ Establish Procedure for Collection of Documents
 - Continued
 - Submittal of Records
 - Duplicate Documents

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Establishing and Maintaining The Documentation Unit PSC

- ▶ Establish an Electronic Filing System
 - Server Establishment
 - Creating File Folders with UICs
 - Electronic File Names
 - “Working” Location on the Server

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Document Processing In The Field PSC

- ▶ Introduction to Document Processing
 - SDMS Database
 - Excel Index and PDF Files

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Document Processing In The Field

PSC

- ▶ Obtain Document ID Numbers
 - Reserving SDMS Document ID Numbers

Barcodes are generated in MS Excel and then imported into MS Word



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19

Document Processing In The Field

PSC

- ▶ Paper Document Processing Procedures
 - Document Organization and Control

UIC on first page: 0680 (Operations Section, Oil Recovery and Cleanup (O&M, SOTF, Dredging, Remediation))

SDMS DocID Barcode



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20

Document Processing In The Field

PSC

- ▶ Paper Document Processing Procedures – Continued
 - Indexing



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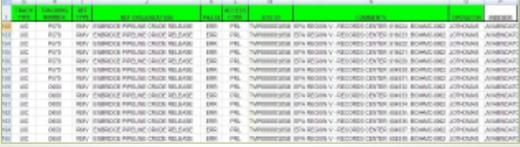
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21

Document Processing In The Field

PSC

- ▶ Paper Document Processing Procedures – Continued
 - Indexing Continued



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Document Processing In The Field

PSC

- ▶ Paper Document Processing Procedures – Continued
 - ▶ Scanning and Standards
 - Specific Scanner
 - 300 dpi
 - Black /White or 24-bit Color (No Grayscale)
 - PDF Files with OCR Text Embedded Under the Image
 - Compatible with Adobe 8.0 or Higher

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Document Processing In The Field

PSC

- ▶ Paper Document Processing Procedures – Continued
 - ▶ PDF Processing
 - OCR



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Document Processing In The Field PSC

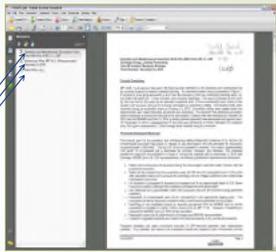
- ▶ Paper Document Processing Procedures – Continued
- ▶ PDF Processing
 - OCR – Continued



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Document Processing In The Field PSC

- ▶ Paper Document Processing Procedures – Continued
- PDF Processing



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Document Processing In The Field PSC

- ▶ Paper Document Processing Procedures – Continued
- Paper Document In-Filing



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Document Processing In The Field PSC

- ▶ Paper Document Processing Procedures – Continued
- ▶ Final QA/QC
 - PDF File and Paper Document Should Correspond
 - Retrieval in SDMS

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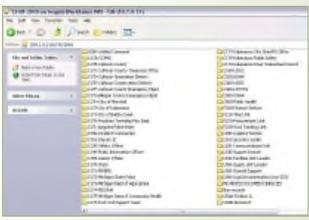
Document Processing In The Field PSC

- ▶ Electronic Document Processing Procedures
 - Prepare Server for Processing
 - ✓ Establish Cut-Off Date
 - ✓ Make all Files, Folders, and Subfolders “Read-Only”
 - ✓ Change Name of Active Server
 - ✓ Create a DU Working File Copy of Archive – Read Only

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Document Processing In The Field PSC

- ▶ Electronic Document Processing Procedures – Continued
 - Organize Electronic Documents by UIC



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Document Processing In The Field

PSC

- ▶ Electronic Document Processing Procedures – Continued
 - Identify Non-Record and Duplicate Electronic Files
 - ✓ What are Non-Records?
 - ✓ Storing Non-Records

Shortcut to 12-01-2010 on Seagate BlackArmor NAS - GIS (10.1.0.11)

Shortcut to 1154 - ER Marshall Oil

Shortcut to Shared on 10.1.0.230

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Document Processing In The Field

PSC

- ▶ Electronic Document Processing Procedures – Continued
 - Identify Non-Record and Duplicate Electronic Files – Continued
 - ✓ Identifying Duplicate Electronic Documents

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Document Processing In The Field

PSC

- ▶ Electronic Document Processing Procedures – Continued
 - Establish Document Boundaries
 - Electronic File Conversion
 - Add Bookmarks
 - Conduct Final QA/QC

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Handling Confidential Business Information (CBI) Documentation

- ▶ What is CBI?
- ▶ Personal Conflict of Interest
- ▶ Delivery of CBI Documentation
- ▶ Storing CBI Documentation



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Responding To Freedom Of Information Act (FOIA) Requests

- ▶ What is a FOIA Request?
- ▶ Regional Office should handle FOIA Requests
- ▶ Information Request Protocol for FOIA requestors
- ▶ Coordinate with Legal Officer or Legal Office

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PSC Course Agenda - 2017

- ▶ Introduction (you are here)
- ▶ ICS Overview
- ▶ Planning Section Overview
- ▶ PSC Interactions (Quiz)
- ▶ Planning Cycle (Quiz)
- ▶ Overview of SITL
- ▶ Meeting Facilitation Skills
- ▶ Facilitating an Initial Unified Command Meeting
- ▶ Overview of RESL
- ▶ RESL Issues
- ▶ Facilitating the C&GS Meeting
- ▶ Pre-Tactics Preparation Discussion
- ▶ Facilitating a Tactics Meeting
- ▶ Overview of the ENVL Position
- ▶ Facilitating a Planning Meeting
- ▶ ICS Forms (see below)
- ▶ Example IAP Review
- ▶ Strategies and Strategic Planning (Quiz)
- ▶ Facilitating an Ops Briefing
- ▶ Information Gathering (Quiz)
- ▶ Documentation Unit Overview
- ▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
- ▶ Demobilization and Transition Plans
- ▶ OPS Briefing Practice

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PSC Course Agenda - 2017 PSC

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Unit 19
PSC Toolbox / Go Kit

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Unit Objectives OSC Toolbox/Go Kit PSC

- Describe items to carry in a Planning Section Chief Go Kit
- Describe components of the OSC Toolbox (epaosc.net)

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USFS Pre-Incident Personal Kit



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PSC 4

PSC Go Kit Items



Go Kit items: Computer, Sheets, Screen, Projector, Agendas, Name Tents, ICS Forms

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Steve's PSC "Go Kit"

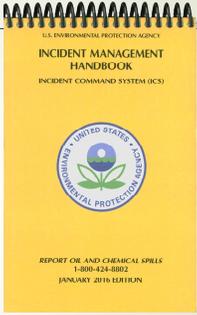
<ul style="list-style-type: none">• Computer / laptop• Thumb drives / external hard drive• "Air card"• LCD projectors (1-3)• Extension cords (2+)• Projection screen, or sheets• ICS forms (hard copy & digital)• Tacks / wall hangers	<ul style="list-style-type: none">• PowerPoint software• PowerPoint org chart• PowerPoint Meeting Agendas• PSC Tool Box http://www.epaosc.net/PlanningSection<ul style="list-style-type: none">– Job Aids– Agendas / Plans / Templates• SITREP template• IAP Examples• NARAC air-plume modeling account• Printer / plotter (Sit Unit)• Name tents for Command & General Staff (C&GS)
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Pre-Incident References

- ▶ EPA IMH
- ▶ Mobilization Guides
- ▶ www.epaosc.net/ICS_FORMS
- ▶ KLP Job Aids (on website)
- ▶ SitRep guidance
- ▶ National Contingency Plan



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Pre-Incident Other Kit Items

- ▶ Laptop computer with software:
 - Word processing (Microsoft Word)
 - Risk analysis
 - NARAC/IMAAC account
 - Spreadsheet (Microsoft Excel)
 - Road atlas (Google/Mapquest)
 - ICS forms
 - Resource tracking
 - Weather link

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Sources for ICS Forms

- ▶ NIT-approved EPA forms
 - response.epa.gov/ICS_FORMS
- ▶ Alternative sites
 - [Coast Guard ICS forms \(Homeport\)](http://www.coastguard.gov.uk/ics-forms)
 - <http://response.restoration.noaa.gov/oil-and-chemical-spills/oil-spills/response-tools/electronic-incident-command-system-ics-forms.html>
 - <https://training.fema.gov/emiweb/is/icsresource/icsforms.htm>
 - <https://www.nwgc.gov/publications/ics-forms>

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Unit Quiz

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13

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PSC Course Agenda - 2017

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- ▶ **Demobilization and Transition Plans**
- ▶ OPS Briefing Practice

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14

PSC Course Agenda - 2017 PSC

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- ▶ OPS Briefing Practice

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Unit 20
Demobilization and Transition Plans
Mission and Function

ICS INSTITUTE  2

Demobilization Unit Functions PSC

- ▶ Planning
- ▶ Work with all sections on the incident
- ▶ Coordinate with Regional Response Center (RRC)
- ▶ Manage the Demobilization Unit in a professional and business like manner
- ▶ Solve demobilization problems/issues

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Demobilization Is: PSC

- ▶ A team effort involving all elements of the ICS organization
- ▶ Safe and orderly release of all resources from the incident/site
- ▶ History shows???



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Staffing the Unit PSC

- ▶ Size of the incident
- ▶ Types of resources
- ▶ Transportation needs
- ▶ Length of event
- ▶ Time of year
- ▶ Other incidents/responses/sites
- ▶ Where did the resources come from?

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Scope of the Job PSC

Very Simple Demobilization – PSC and/or RESL alone

Simple Demobilization – One Demobilization Unit Leader with support from Status / Check-in Recorders (SCKN), local / regional resources, less than 100 people, short duration.

Moderately Complex – One lead Demobilization Unit Leader with one assistant or trainee with support from Status / Check-In Recorder, regional / multiregional, 100-500 people, several air travelers.

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Scope of Job

Very Complex – One lead Demobilization Unit Leader with 2-3 assistants with support from Status / Check-In Recorder, multiregional / national / NSI (National Significant Event), more than 500 people from multiple agencies and areas, long duration, probably reassignments.

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Demobilization Workload Curve

Demob Workload

Incident Begins

Demob Planning & Implementation

Incidental Demob Emergency Demob

Incident Demob

Incident Duration

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Incident Commander Responsibilities

- ▶ Sets release priorities and timeframes
 - Checks adequacy of the plan
 - Approves the plan
- ▶ Coordinates overall planning efforts
 - Manages agency(ies) considerations
 - Manages the overall demobilization process

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Setting Release Priorities PSC

- ▶ Coordinated with host agency
- ▶ Coordinated with resource sources
- ▶ National and regional needs
- ▶ Other considerations

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Demobilization Planning Meeting PSC

- ▶ May be special meeting to discuss demobilization only
- ▶ Command and General Staff should be present
- ▶ A basic plan should be made available for review and to ensure nothing is overlooked
- ▶ Achieve concurrence from Command and General Staff

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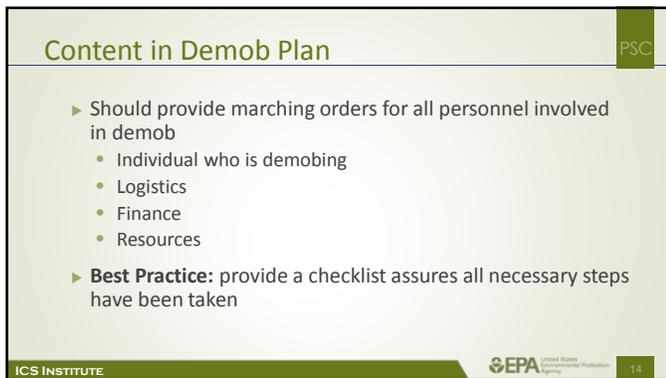
Demobilization Plan PSC

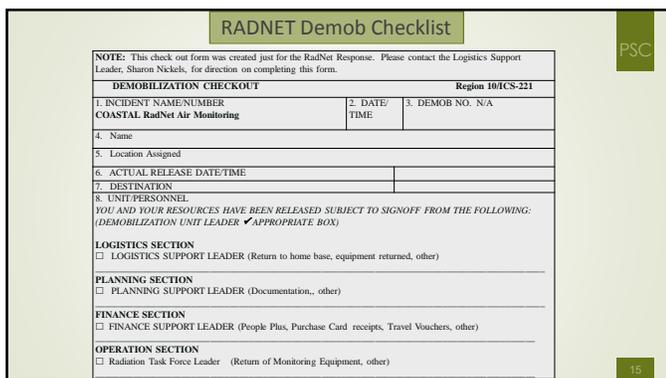
1. General Section
2. Responsibilities Section
3. Release Priorities
4. Release Procedures
5. Travel Information

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Demobilization Unit -- Overview







Transition Planning for IMT PSC

- ▶ You are one in a series of Planning Section Chiefs
- ▶ Your unit leaders are one in a series of Unit Leaders

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Transition Plan from EPA to non-EPA PSC

- ▶ Transition of the work/responsibility from EPA back to State/Locals
- ▶ Example: During Katrina, EPA IMTs developed plans for transitioning each task for each Parish

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Additional Plans PSC

- ▶ Severe weather plan
- ▶ Mardi-Gras Traffic Plan
- ▶ Holiday staffing plans
- ▶ Multiple Disaster Contingency Plan
- ▶ Residential re-entry plan
- ▶ VIP Tour plan

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The Yerkes Dodson Curve

As a section manager, your goal is to keep your staff in the eustress zone.

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