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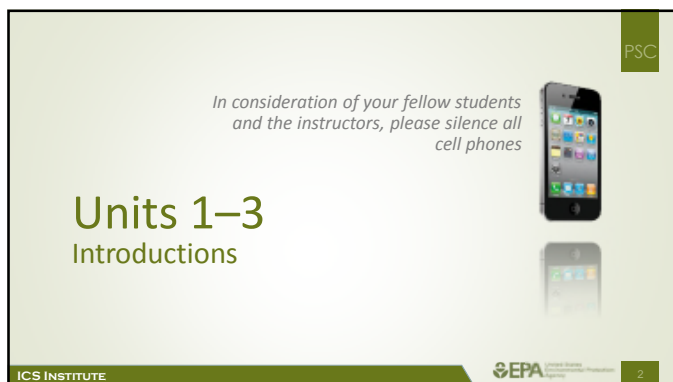
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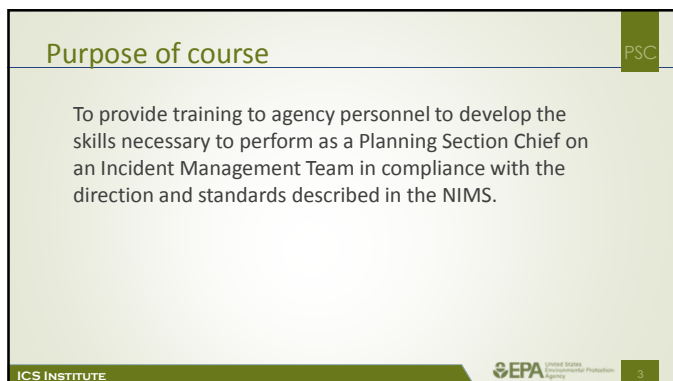
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### Instructor Introduction

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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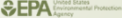
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### Resources

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

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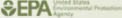
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### For Starters

- ▶ 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.?

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### Administrative Details

- ▶ 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

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### 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

► Final Exercise

- On Friday, March 24<sup>th</sup>, 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

► 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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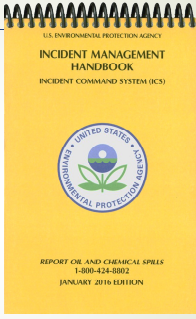
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### U.S. EPA ICS Guidance

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



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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-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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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

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- ▶ 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

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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



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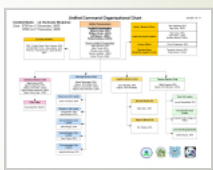



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### Hurricane Katrina - 2005



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

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SONS 07

June 2007  
Springfield

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



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

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### Enbridge Pipeline Response

August 2010, Marshall, MI



- ▶ 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



- ▶ 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



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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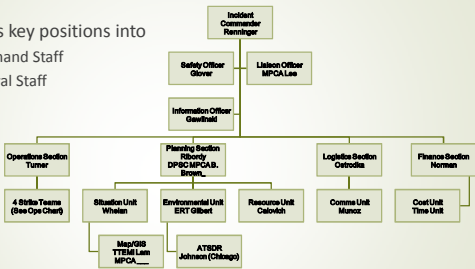
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The System

Divides key positions into

- Command Staff
- General Staff



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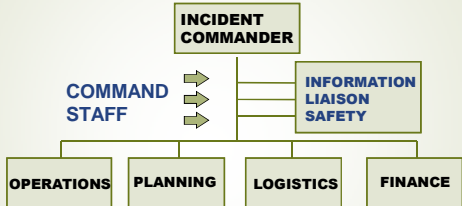
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The Command Staff



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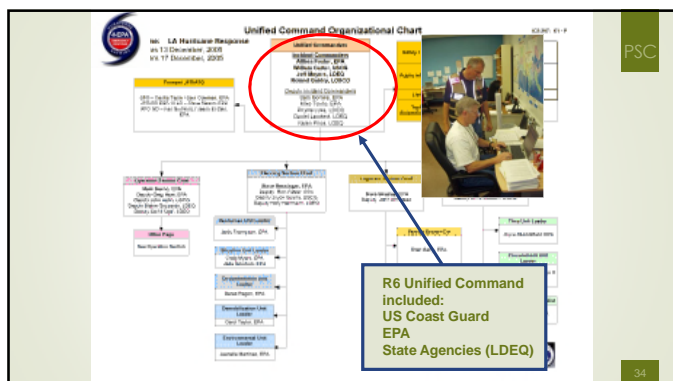
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### ESF-10 Unified Command Hurricane Katrina 2005 – EPA Region 4

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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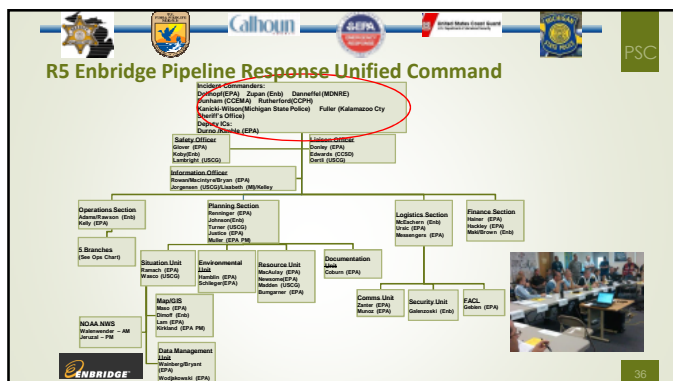
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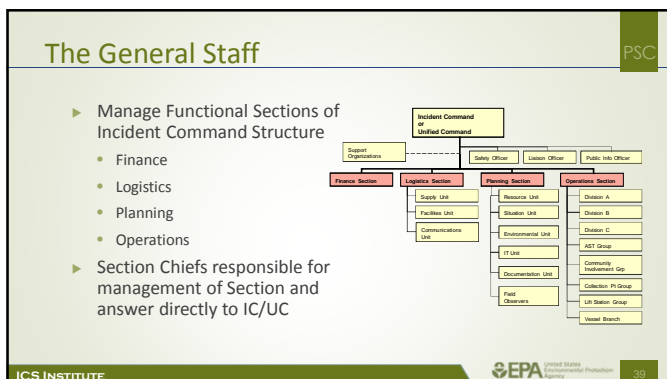
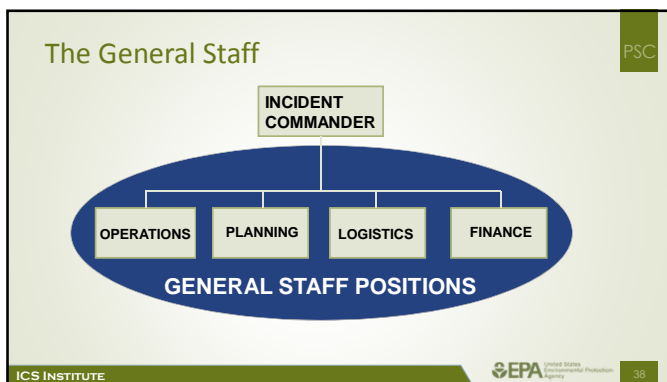
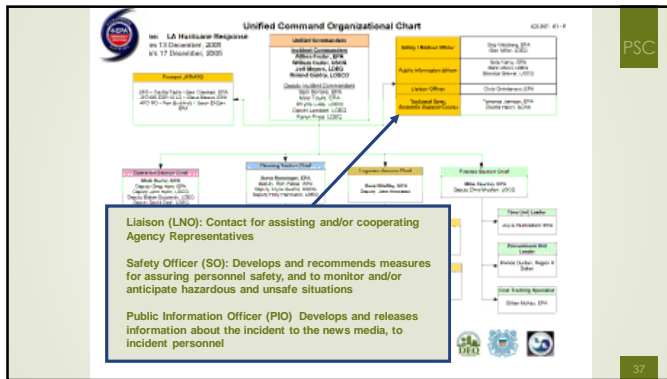
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[illegible][illegible]

## Operational Divisions

September 02 – 06, 2005

Divisions based on State boundaries





PSC

Mississippi Division  
(Hancock, Harrison,  
Jackson Co.)

Alabama Division  
(Mobile, Baldwin Co.)

USCG ATC

Hattiesburg

Mobile

Baldwin

Field Command Post

Incident Command Post

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[illegible]

## 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

[illegible]

## 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)

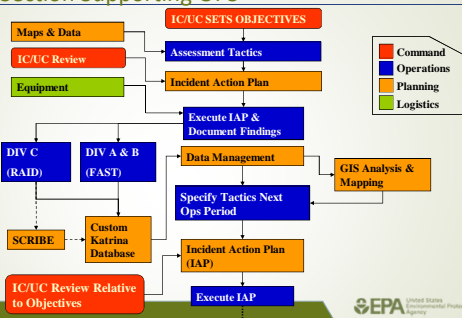
- Systematic sweeps
- Special operations (Large Tank Retrieval and/or Water Ops)

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## OPS Assessment Process

### Planning Section Supporting OPS



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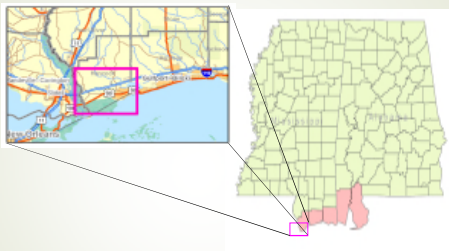
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## Operations – Grid System Planning Section Supporting OPS



## 1. Alabama and Mississippi – Assessment Area

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[illegible]

Operations – Grid System

Planning Section Supporting OPS

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

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Operations – Grid System

Planning Section Supporting OPS

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3. Grid system overlay on base map

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Operations – Assessment Photos

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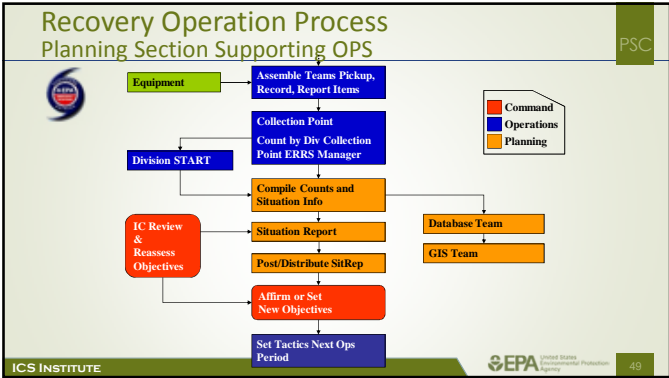
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Material Recovery Summary  
Planning Section Supporting OPS

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

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### Operations – ASTs – Examples

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### Operations – Above Storage Tanks (AST)

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## Operations – Collection Points

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## Unified Command Organizational Chart

Incident Name: LA Hurricane Response  
 Date: 07/20/16 13:00:00  
 1700 N/A 17:00:00

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

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## 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

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Planning Section Chief

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## Logistics Specific Activities

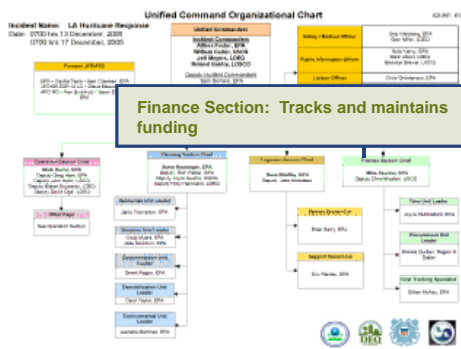


- ▶ Facilities
  - Office space
  - Lodging
- ▶ Supplies
  - Office equipment
  - Field equipment
- ▶ Communication
  - 2-way
  - Internet



Satellite internet connection


**Finance Section: Tracks and maintains funding**



## Finance Section

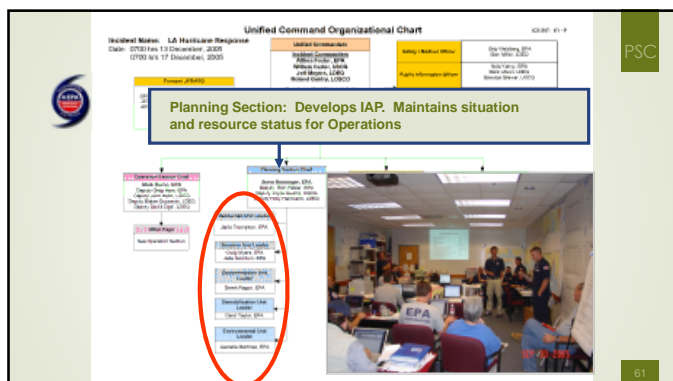


Responsible for all financial, administrative, and cost analysis aspects of incident

- ▶ 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
- 
- The photograph shows two individuals in an office environment. In the foreground, a man with grey hair is seated at a desk, viewed from the side, working on a laptop. He is wearing a light-colored short-sleeved shirt. Behind him, another person is seated, wearing a white t-shirt with 'US EPA' printed on the back. They are in a room with other desks and office equipment visible in the background.



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




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PSC Course Agenda - 2017	
<ul style="list-style-type: none"> <li>Introduction (you are here)</li> <li>ICS Overview</li> <li><b>Planning Section Overview</b></li> <li>PSC Interactions (Quiz)</li> <li>Planning Cycle (Quiz)</li> <li>Overview of SITL</li> <li>Meeting Facilitation Skills</li> <li>Facilitating an Initial Unified Command Meeting</li> <li>Overview of RESL</li> <li>RESL Issues</li> <li>Facilitating the C&amp;GS Meeting</li> <li>Pre-Tactics Preparation Discussion</li> </ul>	<ul style="list-style-type: none"> <li>Facilitating a Tactics Meeting</li> <li>Overview of the ENVL Position</li> <li>Facilitating a Planning Meeting</li> <li>ICS Forms (see below)</li> <li>Example IAP Review</li> <li>Strategies and Strategic Planning (Quiz)</li> <li>Facilitating an Ops Briefing</li> <li>Information Gathering (Quiz)</li> <li>Documentation Unit Overview</li> <li>PSC Toolbox/Go Kit (Quiz – includes all-module review)</li> <li>Demobilization and Transition Plans</li> <li>OPS Briefing Practice</li> </ul>

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### Planning Section Chief Major Responsibilities

- 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)

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## 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**

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## 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

- ▶ 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?

- ▶ 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



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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Planning Section Chief

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### RNC Website



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

- SitReps
- Maps
- IAPs
- Org Charts



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### Incident Notification Log

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

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### Incident Notification Log - WebEOC

Following prioritization, Incidents entered into WebEOC

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### 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

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### 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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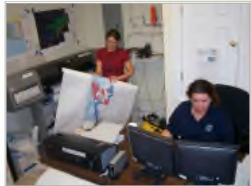
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### Planning – Information Technology (IT) Unit



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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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)	▶ Facilitating a Tactics Meeting
▶ ICS Overview	▶ Overview of the ENVL Position
▶ Planning Section Overview	▶ Facilitating a Planning Meeting
▶ <b>PSC Interactions (Quiz)</b>	▶ ICS Forms (see below)
▶ Planning Cycle (Quiz)	▶ Example IAP Review
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▶ RESL Issues	▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)
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▶ Pre-Tactics Preparation Discussion	▶ 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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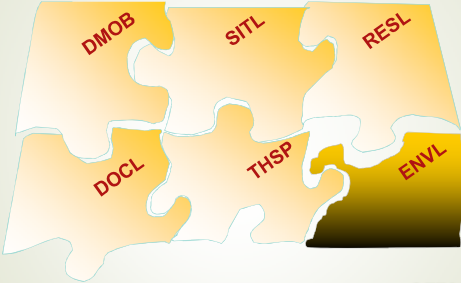
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Managing the Planning Section –  
Coordination Issues

PSC



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Information Exchange Opportunities

PSC

- ▶ 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

PSC



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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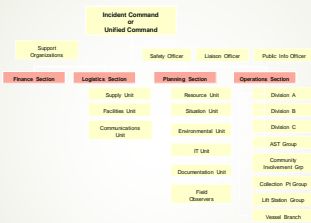
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### Information Flow Discussion:

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

- 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

- 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
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- 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

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### PSC Course Agenda - 2017

PSC

▶ Introduction (you are here)	▶ Facilitating a Tactics Meeting
▶ ICS Overview	▶ Overview of the ENVL Position
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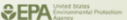
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## Unit 5

### The Planning Cycle

PSC

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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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### Objectives

#### The Planning Cycle

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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### YOU Are Responsible!

PSC

▶ 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

PSC

▶ Establish Time Frames

▶ PSC is responsible

▶ Team's expectation

▶ Major Milestones

- Tactics Meeting
- Planning Meeting
- Incident Action Plan Prep
- Operational briefing
- Incident Status Reports

OPERATIONAL PERIOD PLANNING CYCLE

TACTICS MEETING

PREPARING FOR THE TACTICS MEETING

COMMAND & GENERAL STAFF MEETING

IC/JUC DEVELOPS/SETS OBJECTIVES MEETING

INITIAL IJC MEETING

INCIDENT BRIEF ICS-201-EPA FORM

INITIAL RESPONSE AND ASSESSMENT

NOTIFICATIONS

INCIDENT / EVENT

Initial Response

PREPARING FOR THE PLANNING MEETING

PLANNING MEETING

IAP PREP & APPROVAL

OPERATIONS BRIEFING

EXECUTE PLAN & ASSESS PROGRESS

NEW OPS PERIOD BEGINS

OPERATIONAL PERIOD PLANNING

Ongoing Field Operations

Events most related to assembling an IAP

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Planning Section Chief

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### Planning Process

Introduction, Briefing, Initial Meeting

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### ICS Planning Process



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

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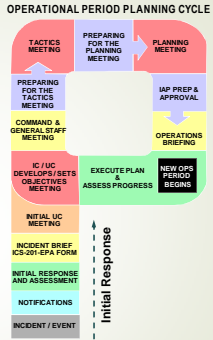
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### Planning Section Chief - The Planning P

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



OPERATIONAL PERIOD PLANNING CYCLE

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## Written IAP Considered

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

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## When a Written IAP Is Considered

- ▶ 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)

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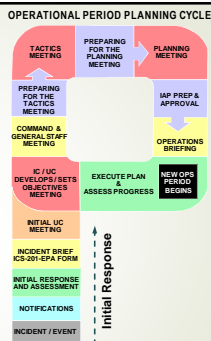
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## What's an Operational Period?

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

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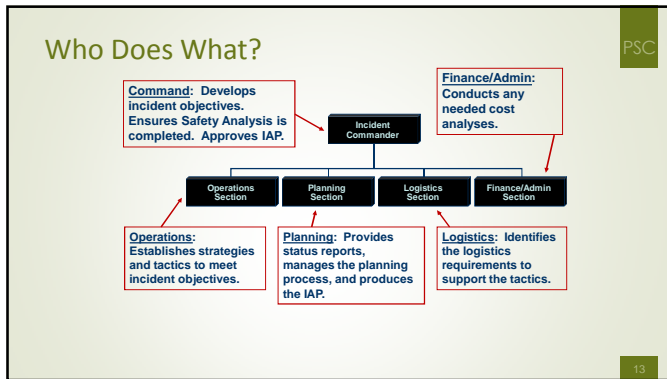
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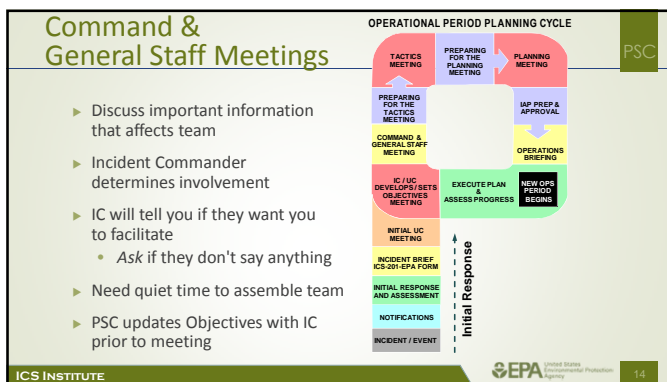
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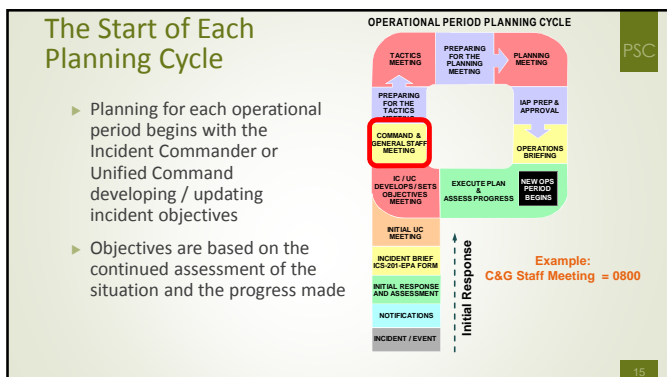
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### Command & General Staff Meeting Agenda


#### 2007 R5 IMT @ SON507

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)
- 207 (Roll Call)
- Opening Comments
- Objectives/Key Decisions
- Situation Update
- Action Items
- Information Issues
- Liaison Issues
- Safety Issues
- Finance Issues
- Logistics Issues
- Planning Section Issues
- Operations Section Issues
- IC/Closing Comments
- Meeting Schedule

- PSC
- PSC
- IC
- IC/PSC
- SITL
- PSC/Staff
- IO
- LNO
- SO
- FSC
- LSC
- PSC
- OPS
- IC
- PSC

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### Planning Process



Initial Strategy Meeting (aka C&G Staff Meeting)

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### The Tactics Meeting: Overview



OPERATIONAL PERIOD PLANNING CYCLE



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### ICS 215



- ▶ Prepared by Ops prior to Tactics Meeting
- ▶ Must be complete
- ▶ Must be accurate
- ▶ "Your" shop will use to develop IAP
  - RESL will convert data to 204(s)

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### 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

OPERATIONAL PERIOD PLANNING CYCLE

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### Tactics Meeting Agenda

24-Hour Operational Period: \_\_\_\_\_ - \_\_\_\_\_

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

PSC

PSC

PSC

SITL

SITL

OPS

OPS

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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The diagram illustrates the relationship between Incident Objectives, Strategies, and Tactics. It consists of three blue rectangular boxes arranged vertically, connected by orange downward-pointing arrows. To the right of each box is a descriptive text.

- 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.

A blue box at the bottom contains a football analogy:

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

[illegible]

# Tactics Meeting: Documentation

The diagram illustrates the Operational Planning Cycle and the corresponding ICS Form 215 worksheet. The cycle is a continuous loop of seven steps: TACTICS MEETING, PREPARING FOR THE PLANNING MEETING, PLANNING MEETING, IAP PREP & APPROVAL, OPERATIONS BRIEFING, EXECUTE PLAN / ASSESS PROGRESS, and NEW OPS PERIOD BEGINS. The cycle then loops back to TACTICS MEETING. The ICS Form 215 worksheet is shown as a map of Ohio, with the planning cycle steps mapped to specific sections of the form. The form is divided into three main sections: Planning and Strategy, Operations, and Incident / Event. The Planning and Strategy section includes the TACTICS MEETING, PREPARING FOR THE PLANNING MEETING, and PLANNING MEETING. The Operations section includes IAP PREP & APPROVAL, OPERATIONS BRIEFING, and EXECUTE PLAN / ASSESS PROGRESS. The Incident / Event section includes NEW OPS PERIOD BEGINS, INITIAL UC MEETING, INCIDENT BRIEF ICS-201 ICS FORM, INITIAL RESPONSE AND ASSESSMENT, NOTIFICATIONS, and INCIDENT / EVENT.

**OPERATIONAL PLANNING WORKSHEET**

PLANNING AND STRATEGY		OPERATIONS		INCIDENT / EVENT	
SECTION	DATE	SECTION	DATE	SECTION	DATE
Planning and Strategy		Operations		Incident / Event	
TACTICS MEETING		IAP PREP & APPROVAL		NEW OPS PERIOD BEGINS	
PREPARING FOR THE PLANNING MEETING		OPERATIONS BRIEFING		EXECUTE PLAN / ASSESS PROGRESS	
PLANNING MEETING		EXECUTE PLAN / ASSESS PROGRESS		INITIAL UC MEETING	
				INCIDENT BRIEF ICS-201 ICS FORM	
				INITIAL RESPONSE AND ASSESSMENT	
				NOTIFICATIONS	
				INCIDENT / EVENT	

**Operational Planning Worksheet, ICS Form 215**

**Operational Planning Cycle**

1. TACTICS MEETING

2. PREPARING FOR THE PLANNING MEETING

3. PLANNING MEETING

4. IAP PREP & APPROVAL

5. OPERATIONS BRIEFING

6. EXECUTE PLAN / ASSESS PROGRESS

7. NEW OPS PERIOD BEGINS

Initial Response

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[illegible][illegible]

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### 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

**OPERATIONAL PERIOD PLANNING CYCLE**

The cycle includes: TACTICS MEETING, PREPARING FOR THE PLANNING MEETING (highlighted), PLANNING MEETING, IAP PREP & APPROVAL, OPERATIONS BRIEFING, NEW OPS PERIOD BEGINS, EXECUTE PLAN & ASSESS PROGRESS, IC / UC DEVELOPS / SETS OBJECTIVES MEETING, COMMAND & GENERAL STAFF MEETING, PREPARING FOR THE TACTICS MEETING, INITIAL UC MEETING, INCIDENT BRIEF ICS 201-EPA FORM, INITIAL RESPONSE AND ASSESSMENT, NOTIFICATIONS, and INCIDENT / EVENT. A vertical arrow labeled 'Initial Response' points upwards through the bottom half of the cycle.

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### 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)	COML	
ICS 205 (Incident Radio Communications Plan)	COML	
ICS 206 (Medical Plan)	LAC/BO	
ICS 207 (Organization Chart)	RESL	
ICS 220 (Air Operations Summary)*	OPS	
Incident Map	ISPL	
Location Map of Individual Facilities	LAC / BO	
PIC Database	OPS	
Safety Message	SO	
Traffic Plan	ISPL / LBO	
Weather Forecast	ISPL	
ICS 214 (Unit Log: Blank)	RESL	
ICS 230 (Daily Meeting Schedule)	PSC / RESL	

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### 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...Skipppy @ Katrina)

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### ICS Form 215A – Safety Analysis

The Safety Officer or Incident Commander completes the Safety Analysis using ICS 215A for each operational period.

Organizational Element at Risk

Hazards

Mitigation Strategies

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### Prepare for the Planning Meeting

- Purpose of the Planning Meeting ....present plan to IC/UC for approval
- Key personnel providing input should be aware
- Establish and post location
- Inform attendees of
  - Location
  - Time
  - Expectations

#### OPERATIONAL PERIOD PLANNING CYCLE

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### Standard Display for Planning Meeting (Fire Service)

215

MAP

215A

'90s Wilford video = agenda in hand

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Planning Section Chief

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## Standard Display for Planning Meeting (EPA Examples)

BP – ICP  
EPA Region 6

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

PSC

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## 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?

PSC

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## Planning Section Responsibilities – Situation Unit @ Planning Meeting

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

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### Planning Section Responsibilities – Environmental Unit @ Planning Meeting

ENVL summarizing air model. Supports Ops plan

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### Planning Section Responsibilities

**Resources Unit**

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

PSC

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### 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

PSC

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**Planning Meeting Displays**  
2005



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



Hurricane Katrina ICP - 2005

PSC

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**Planning Meeting Displays**  
2007



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



SONS 07

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### Planning Meeting Displays 2010



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



Enbridge Response ICP - 2010

PSC

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### Planning Meeting Agenda

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

• 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

PSC

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### Planning Meeting Agenda

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

• 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

OPERATIONAL PERIOD PLANNING CYCLE

TACTICS MEETING

PREPARING FOR THE TACTICS MEETING

COMMAND & GENERAL STAFF MEETING

IC/LSC DEVELOPS/SETS OBJECTIVES MEETING

INITIAL IIC MEETING

INCIDENT BRIEF ICS 201-EPA FORM

INITIAL RESPONSE AND ASSESSMENT

NOTIFICATIONS

INCIDENT / EVENT

PREPARING FOR THE PLANNING MEETING

PLANNING MEETING

IAP PREP & APPROVAL

OPERATIONS BRIEFING

EXECUTE PLAN & ASSESS PROGRESS

NEW OPS PERIOD BEGINS

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

- ▶ 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](https://response.epa.gov)

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### Duplication Considerations

- ▶ 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

- ▶ 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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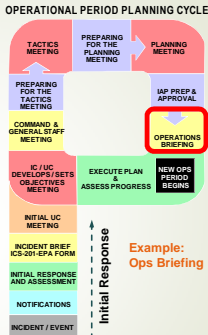
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### Operations Briefing


**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



Example:  
Ops Briefing = 0700

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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



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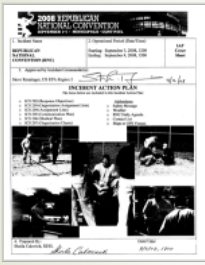
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### Operations Briefing



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Operations Briefing

PSC

OPS Briefing at 2015 Galena, IL Train Derailment

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Planning Process

PSC

Ops Briefing

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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 illustrates the Operational Period Planning Cycle. It starts with 'Initial Response' at the bottom, leading to 'INCIDENT / EVENT', 'NOTIFICATIONS', 'INITIAL RESPONSE AND ASSESSMENT', and 'INCIDENT BRIEF ICS 201-EPA FORM'. This leads to an 'INITIAL UC MEETING', then 'IC / UC DEVELOPS / SETS OBJECTIVES MEETING', and 'COMMAND & GENERAL STAFF MEETING'. From there, it goes to 'PREPARING FOR THE TACTICS MEETING', 'TACTICS MEETING', 'PREPARING FOR THE PLANNING MEETING', and 'PLANNING MEETING'. The 'PLANNING MEETING' leads to 'IAP PREP & APPROVAL', 'OPERATIONS BRIEFING', and 'EXECUTE PLAN & ASSESS PROGRESS'. This cycle then leads to 'NEW OPS PERIOD BEGINS'. The 'EXECUTE PLAN & ASSESS PROGRESS' box is highlighted with a red border.

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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 the one in the first slide, but the 'PLANNING MEETING' and 'IAP PREP & APPROVAL' boxes are highlighted with a red border.

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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 the one in the second slide, with 'PLANNING MEETING' and 'IAP PREP & APPROVAL' 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

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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
- ▶ 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 6

#### Situation Unit Leader

*Mission and Function*

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### 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

- ▶ 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:

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

- 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.

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### Turning Info into Intel Maps / Flexviewers

PSC

- ▶ 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?*

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### 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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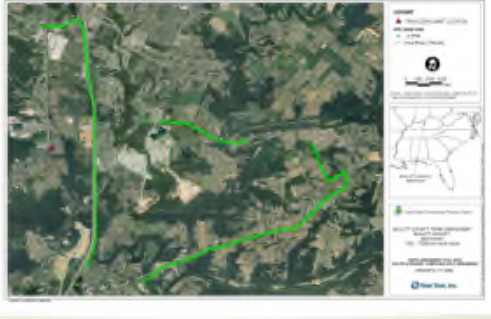
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### GIS



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### NARAC



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AreaRAEs

The slide content includes two photographs on the left: the top one shows a grassy field with several black oil drums lying on the ground, and the bottom one shows a blue portable toilet. To the right of the photos is a map of a coastal area with various colored zones and labels. Further right is a legend with symbols and text, and below that is a small map of the United States with a red dot indicating the location of the incident.

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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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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

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▶ 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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### DWH Spill: Jackson, MS

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

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### ICS Planning Process

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### 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

The diagram illustrates the Operational Period Planning Cycle, a continuous loop of planning and execution phases. It includes stages such as 'Tactics Meeting', 'Preparing for the Planning Meeting', 'Planning Meeting', 'JAP Prep & Approval', 'Operations Briefing', 'New Ops Period Briefing', 'Execute Plan', 'Assess Progress', 'IC/UC Develops Bets/ Objectives Meeting', 'Command & General Staff Meeting', 'Preparing for the Tactics Meeting', 'Initial UC Meeting', 'Incident Brief', 'Initial Response and Assessment', 'Notifications', and 'Incident / Event'. A central box labeled 'Ongoing Field Operations' is connected to the cycle. A note states: 'Operational Period Planning Cycle: Critical initial meeting to assemble an JAP'. Logos for ICS Institute and EPA are at the bottom.

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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

The diagram illustrates the Operational Period Planning Cycle, a continuous loop of planning and execution phases. It includes stages such as 'Tactics Meeting', 'Preparing for the Planning Meeting', 'Planning Meeting', 'JAP Prep & Approval', 'Operations Briefing', 'New Ops Period Briefing', 'Execute Plan', 'Assess Progress', 'IC/UC Develops Bets/ Objectives Meeting', 'Command & General Staff Meeting', 'Preparing for the Tactics Meeting', 'Initial UC Meeting', 'Incident Brief', 'Initial Response and Assessment', 'Notifications', and 'Incident / Event'. A central box labeled 'Ongoing Field Operations' is connected to the cycle. A note states: 'Operational Period Planning Cycle: Critical initial meeting to assemble an JAP'. Logos for ICS Institute and EPA are at the bottom.

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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

A photograph showing a person in a blue shirt pointing at a large map or display on a screen. The map appears to be a topographical or planimetric map with various lines and markings.

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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



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### 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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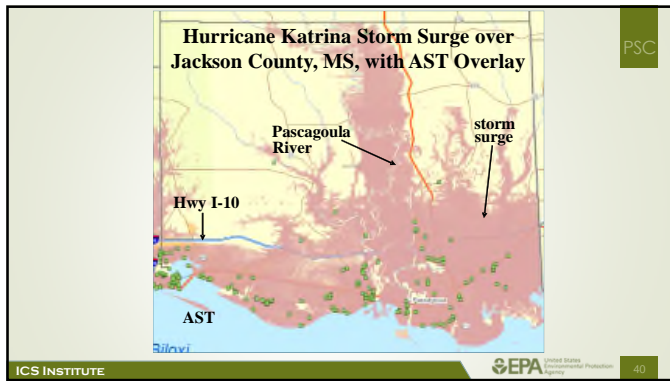
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**The SitRep**

- ▶ SitRep builder is in WebEOC
- ▶ Audience: Unified Command Management
- ▶ 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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**SITL IMT Support**

- ▶ The Situation Unit assists the IMT with displays, maps, imaging and reports that convey incident intelligence required for them to accomplish their mission
- ▶ The Situation Unit Leader must have a thorough understanding of the Intelligence needs of each IMT member

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### Incident Commander

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- ▶ 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

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

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### Resource Unit

- ▶ 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

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



Kalamazoo River: Yellow = critical habitat

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### Finance Section

- ▶ 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

- ▶ 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

- ▶ 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

- ▶ 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

- ▶ **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

- ▶ 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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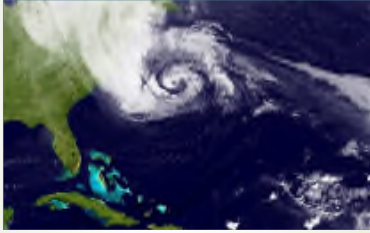
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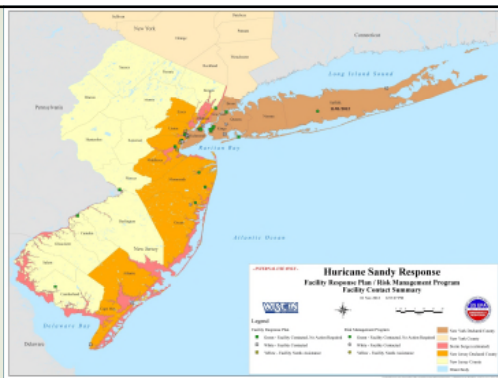
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## Hurricane Sandy



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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)

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### Data Management - SCRIBE

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### GIS

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

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## 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 SITL 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

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

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## Hurricane Katrina

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### Planning – Situation Unit

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- ▶ 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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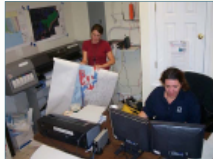
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### Planning – Information Technology Unit

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



Situation Unit Leader uses maps to brief IMT on current status

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### Operations Briefing Agenda

- Intro/Ground Rules/Time Frame/Ops Period
- Current Situation Update
- Incident Objectives
- Weather Forecast
- Ops Assignments (204)
- Safety Briefing
- Comm Plan Info
- Logistical Concerns
- Financial Concerns
- Information Plan & Updates
- Cooperating Agencies
- Next Ops Briefing @ 0800 (6/9/05)
- Next Planning Meeting @ 1200 (6/9/05)
- Closing Comments

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OPS  
IC/PSC  
SITL  
OPS  
SO  
LSC  
LSC  
FSC  
PIO  
LNO  
PSC  
PSC  
IC

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### Operations Briefing – 0700 Daily



Situation Unit Leader prepares maps and weather report for Operations Briefing

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### Briefing Maps Created by Situation Unit



OPS briefing Ops Team in Region IV



Field Operations Maps on ERT Command Post

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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



Click image for January 30, 2006 Situation Report

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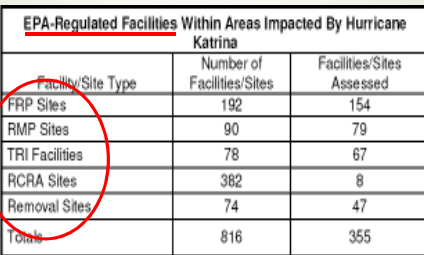
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### Environmental Assessments



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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, Jeffry, 2/17/2017

### EPA's White Goods Recovery & Recycling



Collection Locations	Reporting Period	Grand Total
510	0	0
Grand Isle	28	2,895
Jefferson	505	56,924
Lafourche/Terrebonne	0	772
Orleans	5,514	148,546
Plaquemines	1,041	2,778
St. Bernard	0	10,982
St. Tammany	1,691	55,963
Vermilion *	0	165
West Branch	0	0
Total	8,779	279,095
White Goods Cumulative Total		279,095

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### PSC Course Agenda - 2017

- ▶ Introduction (you are here)
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- ▶ 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
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- ▶ 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

- 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
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- Demobilization and Transition Plans
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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

Initial Response

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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

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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
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Initial Unified Command – Objectives Meeting Agenda

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ICS Form 207

PSC

Identify who is in Unified Command  
Identify lead KLPs

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Initial Unified Command – Objectives Meeting Agenda

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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 PIO = \_\_\_\_\_

UC Lead OPS = \_\_\_\_\_

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

230 Meeting Schedule =

UC Critical Reporting Thresholds =

C&G Staff @ \_\_\_\_\_

Tactics Mtg @ \_\_\_\_\_

Planning Meeting @ \_\_\_\_\_

Ops Briefing @ \_\_\_\_\_

Injury \_\_\_\_\_

Media \_\_\_\_\_

Evacuations \_\_\_\_\_

Funding > \$ \_\_\_\_\_

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Initial Unified Command – Objectives Meeting Agenda

Ground Rules

Roll Call

Purpose of Meeting

Review 207

Key Decisions (see next slide)

Develop/Update Objectives 202 (example to follow)

Action Tracker

Closing Comments

Next Meeting (C&G Staff)

PSC

PSC

PSC

PSC/UC

PSC/UC

PSC/UC

UC

PSC

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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Planning Section Chief

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Initial Unified Command – Objectives Meeting Agenda

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

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Action Item List - Example

PSC

Action	Date Assigned	ICS Section	Assigned To	Status	Date
Complete planning cycle	7/31/2010	Enterprise Planning	EPA PSC	Ongoing	daily
Prepare IAP (components due 1700)	7/31/2010	EPA Planning & Enterprise	RESL(s)	Ongoing	daily
Update DIT Organization Charts	7/31/2010	EPA Planning & Enterprise	RESL(s)	Ongoing	daily
Prepare SITREP (input by 1700)	7/26/2010	EPA Planning	SITL	Ongoing	daily
Integrate Environmental Data into SCRIBE	7/31/2010	EPA Planning	SITL Lam	Ongoing	daily
Resource staffing for graphics	8/1/2010	EPA Planning & Enterprise	RESL(s)	Ongoing	daily

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Initial Unified Command – Objectives Meeting Agenda

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Initial Unified Command – Objectives Meeting Agenda

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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

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▶ ICS Forms (see below)

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▶ Information Gathering (Quiz)

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▶ 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

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 8

Resource Unit Leader

Overview For PSCs

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Incident Command System

PSC

ICS ORGANIZATION

INCIDENT COMMANDER  
IC

SO  
PIO  
SSC  
Liaison

PLANNING  
SECTION CHIEF  
PSC

OPERATIONS  
SECTION CHIEF  
OPS

LOGISTICS  
SECTION CHIEF  
LSC

FINANCE  
SECTION CHIEF  
FSC

RESOURCE  
UNIT LEADER  
RESL

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Planning Section Chief

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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

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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

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



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### Responsibilities

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

- ▶ 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



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### 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	

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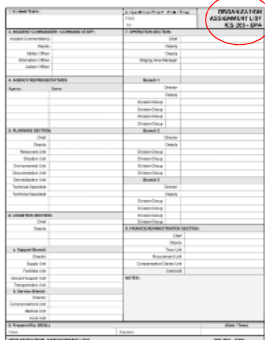
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### ICS Form 203



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ICS Form 203  
– Example

ICS 203, Department Incident/Event Form

Incident Name: Department Incident/Event Form

Incident Number: 00000000

Incident Date: 00/00/00

Incident Time: 00:00:00

Incident Location: 00000000

Incident Type: 00000000

Incident Status: 00000000

Incident Category: 00000000

Incident Subcategory: 00000000

Incident Priority: 00000000

Incident Severity: 00000000

Incident Impact: 00000000

Incident Cause: 00000000

Incident Effect: 00000000

Incident Response: 00000000

Incident Outcome: 00000000

Incident Review: 00000000

Incident Lessons Learned: 00000000

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ICS Form 207

ICS 207 Organizational Chart

Incident Name: 00000000

Incident Number: 00000000

Incident Date: 00/00/00

Incident Time: 00:00:00

Incident Location: 00000000

Incident Type: 00000000

Incident Status: 00000000

Incident Category: 00000000

Incident Subcategory: 00000000

Incident Priority: 00000000

Incident Severity: 00000000

Incident Impact: 00000000

Incident Cause: 00000000

Incident Effect: 00000000

Incident Response: 00000000

Incident Outcome: 00000000

Incident Review: 00000000

Incident Lessons Learned: 00000000

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ICS Form 207 – Example

ICS 207

Incident Name: Hurricane Katrina

Incident Number: 00000000

Incident Date: 00/00/00

Incident Time: 00:00:00

Incident Location: 00000000

Incident Type: 00000000

Incident Status: 00000000

Incident Category: 00000000

Incident Subcategory: 00000000

Incident Priority: 00000000

Incident Severity: 00000000

Incident Impact: 00000000

Incident Cause: 00000000

Incident Effect: 00000000

Incident Response: 00000000

Incident Outcome: 00000000

Incident Review: 00000000

Incident Lessons Learned: 00000000

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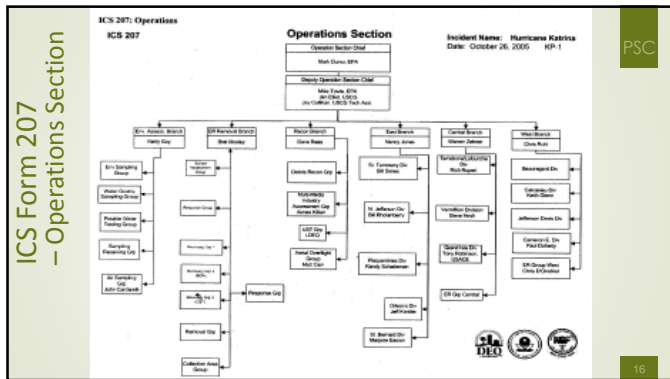
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Resource Unit Functions  
– Hybrid Tactics Meeting

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- ▶ 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

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204

215

- ▶ 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



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### 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



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### 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



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ICS Form 204  
– Example

1. Incident Name: 2. Operational Period (Date/Time): 3. Assignment 3.01: 4. Resource/Personnel	
5. Resource Assigned	
6. Work Assignments	
7. Remarks	
8. Check-in/Check-out	
9. Signature/Initials	

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Resource Unit Functions

- ▶ Establish and maintain Check-in function
- ▶ Assemble Incident Action Plan (IAP)

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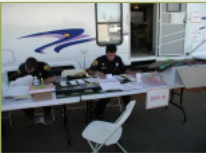
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Activate Resource Unit

1. Attend Incident Briefing
2. Arrange for facilities and equipment
3. Establish Check-in Operations
4. Participate in Planning Meetings



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### Activate Resource Unit

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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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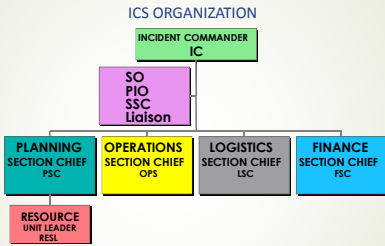
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### Incident Command System

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graph TD; IC[INCIDENT COMMANDER IC] --> SO[SO PIO SSC Liaison]; IC --> PSC[PLANNING SECTION CHIEF PSC]; IC --> OPS[OPERATIONS SECTION CHIEF OPS]; IC --> LSC[LOGISTICS SECTION CHIEF LSC]; IC --> FSC[FINANCE SECTION CHIEF PSC]; PSC --> RUL[RESOURCE UNIT LEADER RESL];
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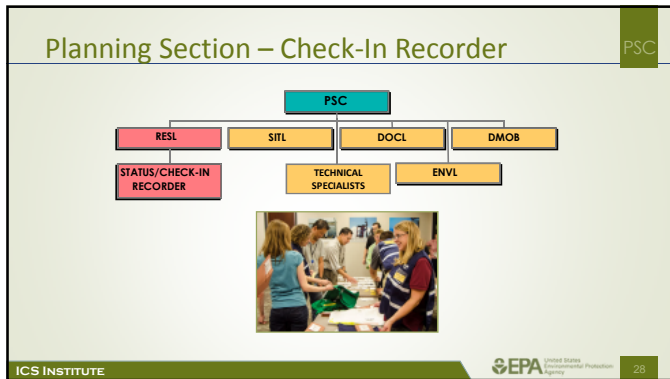
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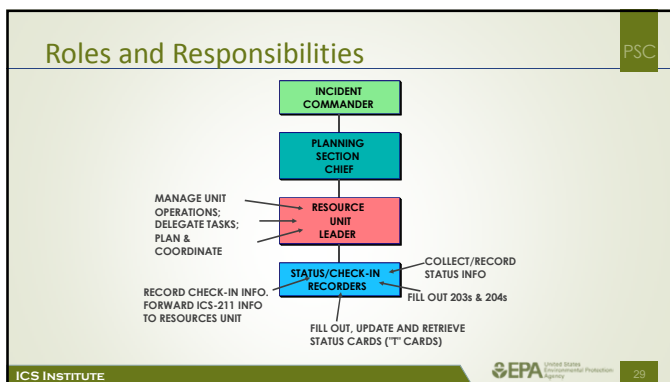
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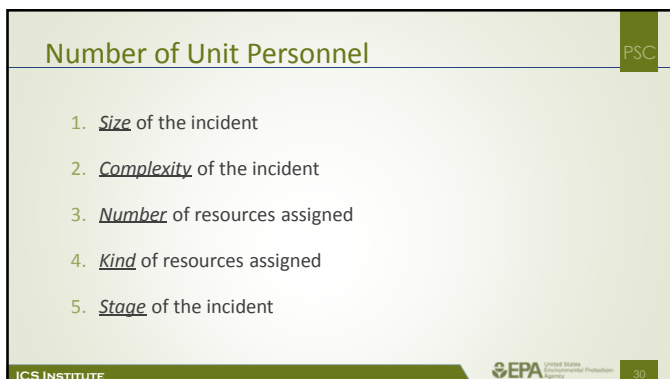
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Staffing Guidelines

PSC

UNIT POSITION

SIZE OF INCIDENT  
(# OF DIVS/Groups)

Resource Unit Leader

2 5 10 15 25

Status Check-In Recorder

1 1 2 2 4

(Add for remote check in locations)

1 2 3 3 5

PER OPERATIONAL PERIOD!

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CHECK-IN



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

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Check-in Locations

PSC

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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[illegible]

## 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[illegible]

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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)

PSC

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

PSC

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

PSC

► 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

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- ▶ 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



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### Incident Formed Task Forces

► 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

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

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- 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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## Resource Unit -- Overview

## IAP Checklist - Example

**The Resource Unit must complete 4 forms for the IAP:**

- 203 with OPS
- 204 with OPS
- 207 with PSC
- 214




### IAP CHECKLIST

PSC

Components of IAP	Primary Responsibility	Status
ICS 202 (Incident Objectives)	IC / PSC	
ICS 203 (Organization Assignment List)	REEL	
ICS 204 (Assignment List)	REEL	
ICS 205a (Incident Communications Plan)	COML	
ICS 209 (Incident Radio Communications Plan)	COML	
ICS 206 (Medical Plan)	LSR/BO	
ICS 207 (Organization)	REEL	
ICS 230 (Air Operations Summary)*	OPS	
Incident Map	REEL	
Location Map of Medical Facilities	LSR / BO	
PFO Quadsheet	OPS	
Safety Message	SO	
Traffic Plan	REEL / LSR	
Weather Forecast	REEL	
ICS 11a (Unit Log: Basic)	REEL	
ICS 230 (Daily Meeting Schedule)	PSC / REEL	

PSC and REEL track IAP component progress using IAP Checklist

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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



Planning Meeting

Cover

Incident Objectives ICS 202

Organization ICS 203


Division Assignment ICS 204

Incident Map

Comm Plan ICS 205

Traffic Plan

Medical Plan ICS 206



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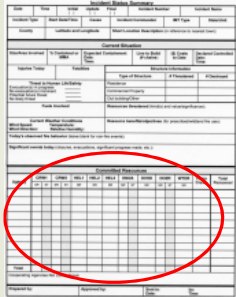
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ICS Form 209 (or SitRep)





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

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Planning Section Chief

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## Slide 57

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**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, Jeffrey, 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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PSC

# PSC Course Agenda - 2017

▶ 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

- 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 9

### Facilitating a Command & General Staff Meeting

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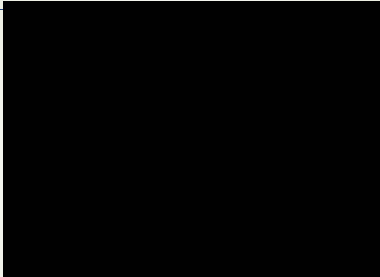
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### Planning Process



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**

The diagram illustrates the Operational Period Planning Cycle as a continuous loop. It starts with an 'Initial Response' phase, which includes an 'Initial Meeting', 'Incident Brief', 'ICS 201-EPA Form', 'Initial Response and Assessment', and 'Notifications'. This leads into the 'Initial Response' phase, which then feeds into the 'Operational Period Planning Cycle'. The cycle consists of several key steps: 'Preparing for the Planning Meeting', 'Planning Meeting', 'Preparing for the Tactics Meeting', 'Tactics Meeting', 'Command & General Staff Meeting', 'IC/UC Develops/sets Objectives Meeting', 'Execute Plan & Assess Progress', 'New Ops Period Begins', and 'Operations Briefing'. The cycle is also influenced by 'Ongoing Field Operations' and 'PSC' (Planning Section Chief) input.

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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 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 reconnaissance 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.

**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.

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## 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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# Command & General Staff Meeting Agenda 2010

- ▶ 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
- Display includes Objectives, Action Tracker, and Agenda



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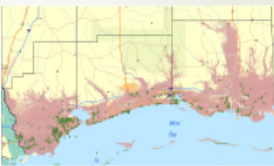
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## Command & General Staff Meeting Agenda

IC may request the Planning Section to prepare the latest Situation maps for the Command & General Staff Meeting

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### ACTION ITEM LIST – Aug 2010


#### EPA Enbridge Response





	A	B	C	D	E	F
	Action	Date Assigned	ICS Section	Assigned To	Status	Date
1	Complete planning cycle	7/31/2010	Enbridge Planning	EPA PSC	Ongoing	daily
2	Prepare IAP (components due 1700)	7/31/2010	EPA Planning & Enbridge	RESL(s)	Ongoing	daily
3	Update 2017 Organization Charts	7/31/2010	EPA Planning & Enbridge	RESL(s)	Ongoing	daily
4	Prepare SUREP (input by 1700)	7/26/2010	EPA Planning	SITL	Ongoing	daily
5	Integrate Environmental Data into SCRIBE	7/31/2010	EPA Planning	SITL Lam	Ongoing	daily
6	Resource staffing for graphic	8/1/2010	EPA Planning & Enbridge	RESL(s)	Ongoing	daily

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### IAP Component Checklist






► IAP Checklist used in 2005 - Hurricane Katrina

ICS Form	Title	Prepared By	Submitted
IAP Cover	Cover	RUL/PSC	
202	Objectives	ICPSC/RUL	
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 SUREP)	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**

SEPTEMBER 2019  
FIGURE 4-1: THE OPERATIONAL PERIOD PLANNING CYCLE

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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	PSC
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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Unified Command:  
IC Steve Spurlin

Safety Officer:  
Melissa Linden

Liaison Officer:  
Ann Whelan

Public Information Officer:  
Terri White

Operations Section:  
Christine Wagner

Planning Section:  
Steve Reminger

Logistics Section:  
Serdar Enap

Finance Section:  
Geoff Krueger

Situation Unit:  
Brian Engert

Environmental Unit:  
Larsa Leonova

Resource Unit:  
Michelle Meyer

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Planning Section Chief

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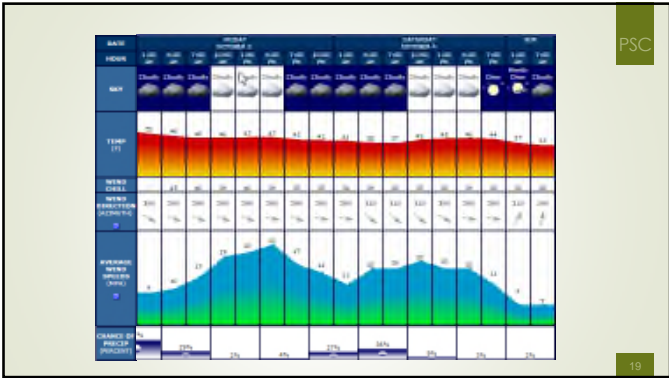
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Command & General Staff Meeting Agenda – \_\_\_\_\_

IMT

PSC

Ground Rules (Cell/1 speaker/30 min)	PSC
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Planning Section Issues	PSC
Operations Section Issues	OPS
IC/Closing Comments	IC
Meeting Schedule	PSC

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Action Item List

PSC

A	B	C	D	E	F	G
No.	Topic	Status	Responsible Party	Date Assigned	Date Due	Date Completed
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

Active Items Completed Items (0)

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Command & General Staff Meeting Agenda – \_\_\_\_  
IMT

PSC

➤ Ground Rules (Cell/1 speaker/30 min)	PSC
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➤ Situation Update	SITL
➤ Action Items	PSC/Staff
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➤ Liaison Issues	LNO
➤ Safety Issues	SO
➤ Finance Issues	PSC
➤ 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

PSC

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➤ Safety Issues	SO
➤ Finance Issues	PSC
➤ 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

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➤ Operations Section Issues	OPS
➤ IC/Closing Comments	IC
➤ Meeting Schedule	PSC

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Command & General Staff Meeting Agenda – \_\_\_\_  
IMT

PSC

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➤ IC/Closing Comments	IC
➤ Meeting Schedule	PSC

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Command & General Staff Meeting Agenda – \_\_\_\_  
IMT

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➤ Safety Issues	SO
➤ Finance Issues	PSC
➤ Logistics Issues	LSC
➤ Planning Section Issues (SITL/RESL/ENVL) PSC	PSC
➤ Operations Section Issues	OPS
➤ IC/Closing Comments	IC
➤ Meeting Schedule	PSC

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IAP Components

PSC

JANUARY 2018

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 \_\_\_\_

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Command & General Staff Meeting Agenda – \_\_\_\_  
IMT

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➤ Finance Issues	PSC
➤ 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

PSC

➤ Ground Rules (Cell/1 speaker/30 min)	PSC
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➤ Safety Issues	SO
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➤ Logistics Issues	LSC
➤ Planning Section Issues	PSC
➤ Operations Section Issues	OPS
➤ IC/C/Closing Comments	IC
➤ Meeting Schedule	PSC

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Command & General Staff Meeting Agenda – \_\_\_\_  
IMT

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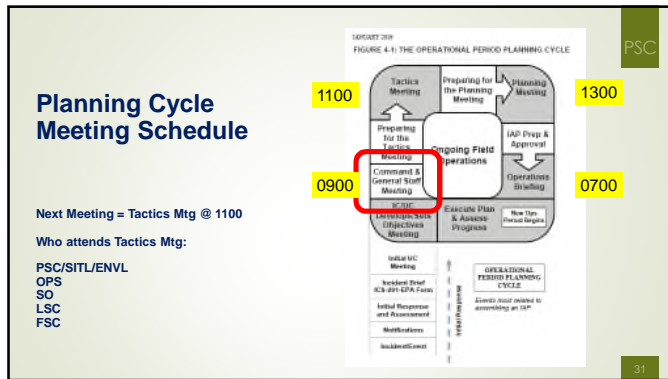
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Planning Section Chief

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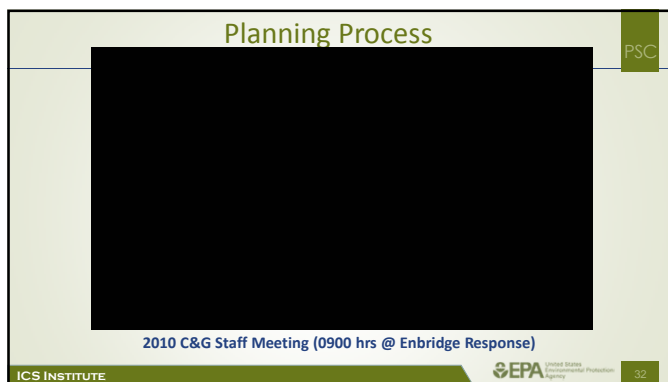
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### PSC Course Agenda - 2017

<ul style="list-style-type: none"> <li>Introduction (you are here)</li> <li>ICS Overview</li> <li>Planning Section Overview</li> <li>PSC Interactions (Quiz)</li> <li>Planning Cycle (Quiz)</li> <li>Overview of SITL</li> <li>Meeting Facilitation Skills</li> <li>Facilitating an Initial Unified Command Meeting</li> <li>Overview of RESL</li> <li>RESL Issues</li> <li>Facilitating the C&amp;GS Meeting</li> <li>Pre-Tactics Preparation Discussion</li> </ul>	<ul style="list-style-type: none"> <li>Facilitating a Tactics Meeting</li> <li>Overview of the ENVL Position</li> <li>Facilitating a Planning Meeting</li> <li>ICS Forms (see below)</li> <li>Example IAP Review</li> <li>Strategies and Strategic Planning (Quiz)</li> <li>Facilitating an Ops Briefing</li> <li>Information Gathering (Quiz)</li> <li>Documentation Unit Overview</li> <li>PSC Toolbox/Go Kit (Quiz – includes all-module review)</li> <li>Demobilization and Transition Plans</li> <li>OPS Briefing Practice</li> </ul>
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### PSC Course Agenda - 2017

- Introduction (you are here)
- ICS Overview
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- Facilitating a Tactics Meeting**
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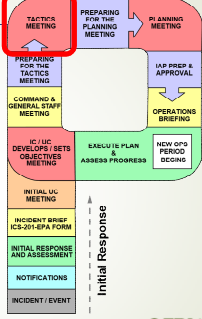
### Tactics Meeting

**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**

#### OPERATIONAL PERIOD PLANNING CYCLE



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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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### Tactics Meeting Agenda

24-Hour Operational Period: \_\_\_\_ - \_\_\_\_

Intro/OPs Period/cell phones	PSC
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Weather for next Ops Period	SITL
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Update Ops 207	OPS
Practice Briefing 215/207/Flex for Planning Mtg	SITL/OPS

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Response Incident Management Assistance Team

Unified Command:  
IC Steve Spurlin

Safety Officer:  
Melissa Linden

Liaison Officer:  
Ann Whelan

Public Information Officer:  
Tari White

Operations Section:  
Christina Wagner

Planning Section:  
Steve Reminger

Logistics Section:  
Sedar Enip


Finance Section:  
Geoff Krieger

Situation Unit:  
Evan Engert

Environmental Unit:  
Lara Leandra

Resource Unit:  
Michelle Meyer

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### Tactics Meeting Agenda

24-Hour Operational Period: \_\_\_\_ - \_\_\_\_

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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. 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 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 POSC 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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Tactics Meeting Agenda

24-Hour Operational Period: \_\_\_\_ - \_\_\_\_

▶ Intro/OPs Period/cell phones

▶ Org Chart

▶ Incident Objectives

▶ Situation/ Update (Flexviewer)

▶ Weather for next Ops Period

▶ OPs Plan (215)

▶ Update Ops 207

▶ Practice Briefing 215/207/Flex for Planning Mtg

PSC

PSC

PSC

SITL

SITL

OPS

OPS

SITL/OPS

PSC

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Tactics Meeting Agenda

24-Hour Operational Period: \_\_\_\_ - \_\_\_\_

▶ Intro/OPs Period/cell phones

▶ Org Chart

▶ Incident Objectives

▶ Situation/ Update

▶ Weather for next Ops Period

▶ OPs Plan (215)

▶ Update Ops 207

▶ Practice Briefing 215/207/Flex for Planning Mtg

PSC

PSC

PSC

SITL

SITL

OPS

OPS

SITL/OPS

PSC

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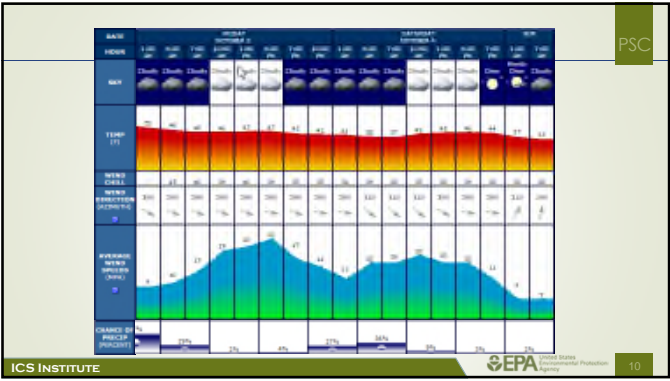
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Tactics Meeting Agenda

24-Hour Operational Period: \_\_\_\_ - \_\_\_\_

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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: \_\_\_\_ - \_\_\_\_

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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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Planning Section Chief

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### Planning Cycle Meeting Schedule

Next Meeting = Planning Mtg @ \_\_\_\_\_

Who attends Planning Mtg:  
Command and General Staff

Purpose:  
Present Plan for UC Approval

OPERATIONAL PERIOD PLANNING CYCLE

1100 0915 1300 PSC

Initial Response

ICS/UC DEVELOPS / SETS OBJECTIVES MEETING

COMMAND & GENERAL STAFF MEETING

PREPARING FOR THE TACTICS MEETING

TACTICS MEETING

PREPARING FOR THE PLANNING MEETING

PLANNING MEETING

JAP PREP & APPROVAL

OPERATIONS BRIEFING

HOW OPS PERIOD BEGINS

EASU/IN PLAN & ADDRESS PROGRESS

INITIAL RESPONSE AND ASSESSMENT

NOTIFICATIONS

INCIDENT / EVENT

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- Demobilization and Transition Plans
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Environmental Unit -- Overview

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- OPS Briefing Practice

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Unit 11

Planning Section Chief

Environmental Unit – Mission, Functions and Management

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NIMS Says:

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 26, NIMS

Homeland Security

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Environmental Unit -- Overview

### Environmental Unit Mission Statement

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 10, 11



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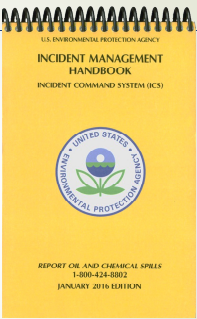
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### EPA Environmental Unit

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



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### ENV Module Roadmap

- ▶ Overview of EU responsibilities
- ▶ Group Activity: incident-specific EUs
- ▶ PSC Role in EU success
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- ▶ *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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Wetland Entry Constraints



Sediment Sampling Plan



Water Sampling Plan



Waste Disposal Plan



Waste Disposal Plan

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Environmental Unit -- Overview

Organizing the ENV

PSC

- ▶ 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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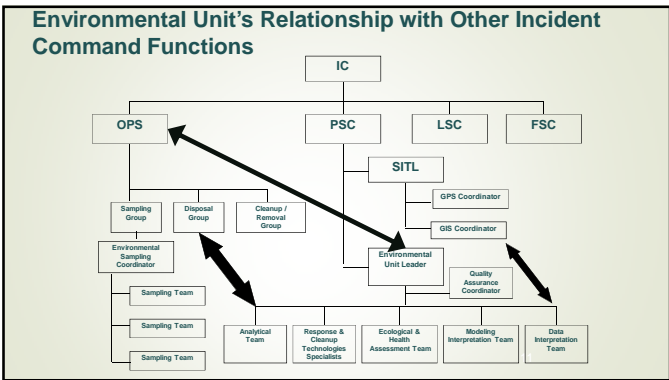
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Communicate with IMT

PSC

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	Environmental information Recommendations for response options Current and Future priorities and actions	PSC
	Guidance on needs of IMT	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	

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Some moments are more powerful than others

PSC

- ▶ 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.

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Who can help your ENVL?

PSC

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



The Cosmos News

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Environmental Unit -- Overview

### Data Management within ICS

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

Ops gathers data  
SITL manages data

Data Distribution  
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 Organization Chart

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### Command Staff: Data Support Coordinator

- 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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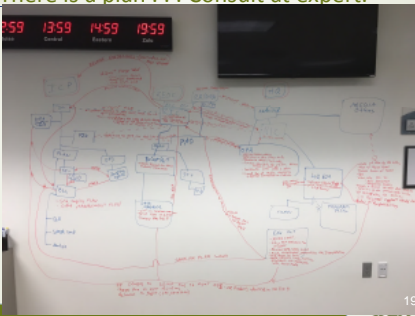
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Environmental Unit -- Overview

There is a plan . . . Consult at expert.



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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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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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# 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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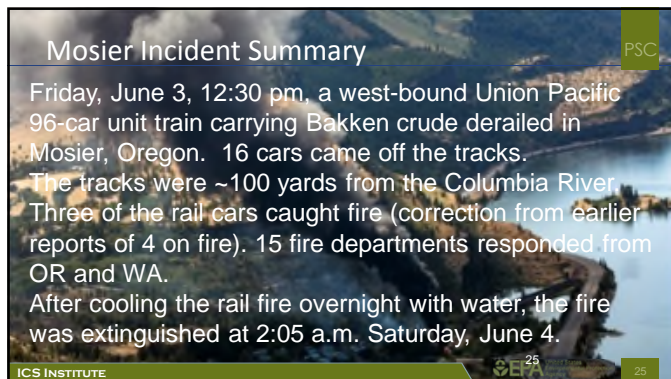
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# Environmental Unit -- Overview

### Mosier Incident Summary

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

- Day 1-2
  - ID booming locations
  - ID critical resources
  - Environmental Assessment Plans
  - *Community Air Monitoring?*



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### Mosier EU Tasks

- 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.

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

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Always a Unique EU Role

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



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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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Environmental Unit -- Overview

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- PSC Toolbox/Go Kit (Quiz – includes all-module review)
- Demobilization and Transition Plans
- OPS Briefing Practice

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Facilitating a Planning Meeting

### PSC Course Agenda - 2017

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## Unit 10

### Facilitating a Planning Meeting

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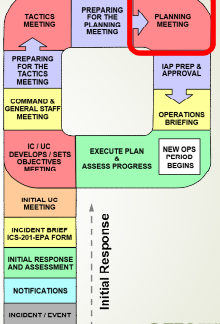
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### Conducting the Planning Meeting

Purpose:  
Present plan  
for IC/UC  
approval

#### OPERATIONAL PERIOD PLANNING CYCLE



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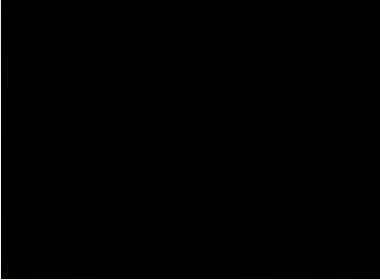
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### Planning Process



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



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### Standard Display for Planning Meeting



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### Standard Display for Planning Meeting (2010 EPA Example)



Enbridge – ICP  
EPA Region 5  
Note: Go Kit items



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### Standard Display for Planning Meeting (2013 EPA Example)



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



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### Standard Display for Planning Meeting (2013 EPA Example)



ENVL summarizing air model. Supports OPS plan



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## 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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Sample Planning Meeting Agenda		PSC
		

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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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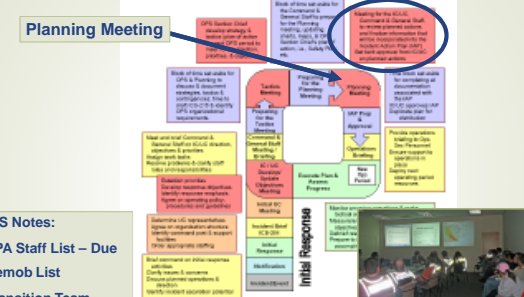
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The Operational Planning "P"

**Planning Meeting**

- ICS National Incident Planning Meeting (NIPM) is a critical meeting for the Incident Commander (IC) to establish the Incident Action Plan (IAP) and to coordinate the response.
- ICS National Incident Planning Meeting (NIPM) is a critical meeting for the Incident Commander (IC) to establish the Incident Action Plan (IAP) and to coordinate the response.
- ICS National Incident Planning Meeting (NIPM) is a critical meeting for the Incident Commander (IC) to establish the Incident Action Plan (IAP) and to coordinate the response.

**Initial Response**

- Initial Response is the first phase of the incident response, where the Incident Commander (IC) establishes the Incident Action Plan (IAP) and coordinates the response.
- Initial Response is the first phase of the incident response, where the Incident Commander (IC) establishes the Incident Action Plan (IAP) and coordinates the response.
- Initial Response is the first phase of the incident response, where the Incident Commander (IC) establishes the Incident Action Plan (IAP) and coordinates the response.

**ICS Notes:**

- EPA Staff List – Due
- Demob List
- Transition Team

**SR**

**PSC**

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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	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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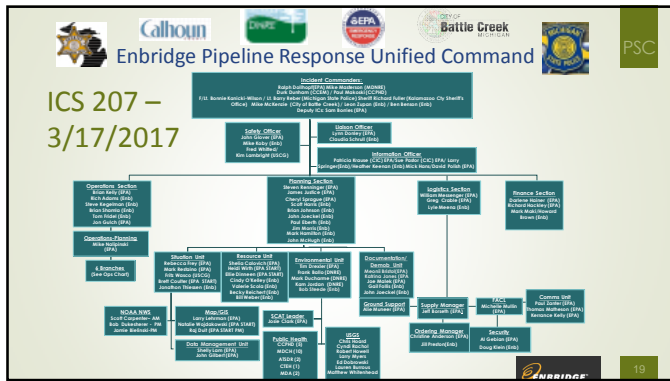
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# Facilitating a Planning Meeting



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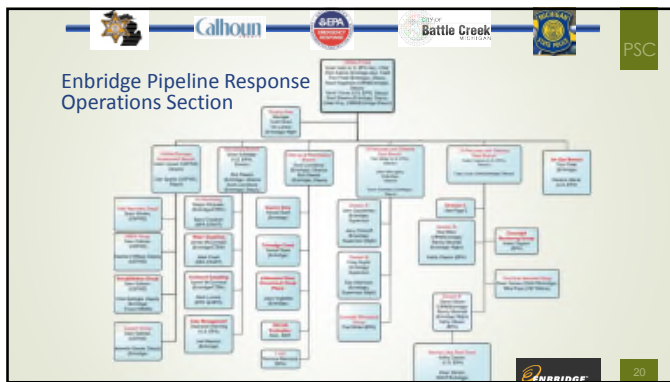
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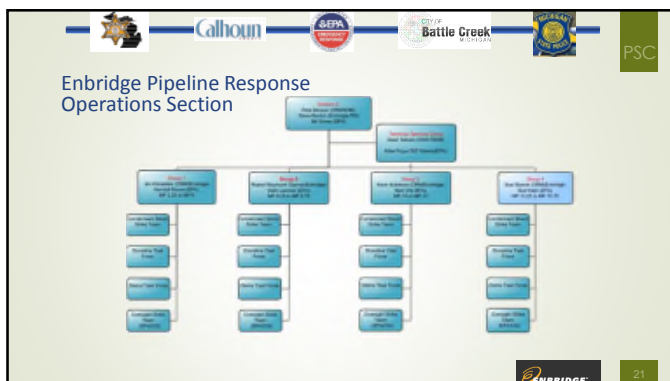
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## Facilitating a Planning Meeting

### 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
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▶ Closing Remarks	UC

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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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### 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 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)

PSC

Intro/OPs Period/cell phones

Org Chart

Incident Objectives

Situation/ Update

Weather

OPs Plan (215)

Safety

Team Consensus (FSC/LSC/SO/LNO/IO/UC)

Schedule Highlights

Closing Remarks

PSC

PSC

PSC

SITL

SITL

PSC

OPS

SO

Staff

PSC

UC

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Planning Meeting Agenda

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

PSC

Intro/OPs Period/cell phones

Org Chart

Incident Objectives

Situation/ Update

Weather

OPs Plan (215)

Safety

Team Consensus (FSC/LSC/SO/LNO/IO/UC)

Schedule Highlights

Closing Remarks

PSC

PSC

PSC

SITL

NOAA

OPS

SO

Staff

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Forecast for Monday, August 16

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Current Conditions

78° 77% 3-4 Laps

Forecast for Monday, Aug 16

5-11° 40% 3-4 Laps

Hourly Forecast

Hourly Forecast

Hourly Forecast

Hourly Forecast

Dry and cooler with temperatures slightly below normal. Breezy in the afternoon.

Maximum heat index values: 80 to 83

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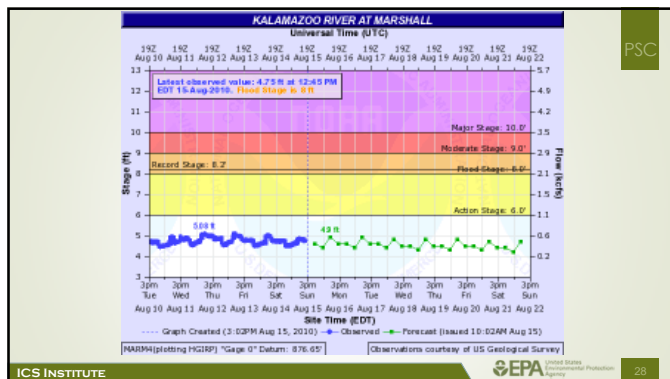
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Planning Section Chief

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### Estimated Travel Time As of Wednesday, August 11, 2010

From	To	Travel Time (hours)
Marshall	Battle Creek	38
Battle Creek	Comstock	68
Comstock	Plainwell	18
Plainwell	Allegan Dam	9
Allegan Dam	New Richmond	64

Travel times have steadied out as the river has returned to baseflow conditions

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### Impacts to Operations

**Monday**

- Dry and Cooler with highs 75 – 80 °F (24 – 27 °C)
- Heat Indices **upper 70s**
- Winds in the afternoon from the West **15-20 mph sustained** with gusts **over 25 mph**

**Monday Night-Tuesday**

- Partly cloudy with light SW winds Monday night. Lows around 57 °F (14 °C)
- Near normal temperatures continue Tuesday – **Around 82 °F** (28 °C)
- Not as breezy

**Outlook: Wednesday-Thursday**

- Slight warming trend – Highs 83-86 °F (28-30 °C)
- Continued Dry Wednesday
- Next chance of showers – late Thursday

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Planning Section Chief

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Planning Section Chief

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## Facilitating a Planning Meeting

JANUARY 2016

### IAP Components

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 \_\_\_\_\_

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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
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▶ Situation/ Update	SITL
▶ Weather	PSC
▶ OPs Plan (215)	OPS
▶ Safety	SO
▶ Team Consensus (PSC/LSC/SO/LNO/IO/UC)	Staff
▶ Schedule Highlights	PSC
▶ Closing Remarks	UC

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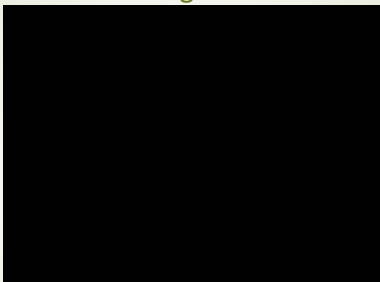
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### Planning Process



Planning Meeting

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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

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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

Incident Action Plan

ICS Forms

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Incident Action Plan/ICS Forms

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OPERATIONAL PERIOD PLANNING CYCLE

TACTICS MEETING

PREPARING FOR THE TACTICS MEETING

COMMAND & GENERAL STAFF MEETING

IC/JUC DEVELOPS/SETS OBJECTIVES MEETING

INITIAL UC MEETING

INCIDENT BRIEF ICS 201-EPA FORM

INITIAL RESPONSE AND ASSESSMENT

NOTIFICATIONS

INCIDENT / EVENT

PREPARING FOR THE PLANNING MEETING

PLANNING MEETING

IAP PREP & APPROVAL

OPERATIONS BRIEFING

EXECUTE PLAN & ASSESS PROGRESS

NEW OPS PERIOD BEGINS

Ongoing Field Operations

OPERATIONAL PERIOD PLANNING CYCLE

Events most related to assembling an IAP

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Planning Section Chief


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### Incident Action Plan/ICS Forms

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- ▶ 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

- 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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Components of the IAP

PSC

► Cover

► ICS Form 202 - EPA Incident Objectives

► ICS Form 203 - EPA Organization Assignment List

► ICS Form 204 - EPA Assignment List

► ICS Form 205 - EPA Incident Radio Communications Plan

► ICS Form 205a – EPA Phone List

► ICS Form 206 – EPA Medical Plan

► ICS Form 207 – Organizational Chart

► ICS Form 230 – Meeting Schedule

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Components of the IAP

PSC

► Incident Map

► Traffic Plan and Map

► Safety Message

► ICS Form 214 – Unit Log

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IAP Cover

PSC

LA Hurricane Response

Unified Incident Management Team (IMT)


Incident Action Plan (IAP)

Oil & Hazardous Materials Response Annex

Operational Period(s)


Starting: 0700 13 Dec 05

Ending: 0700 17 Dec 05



Flagship Park - Grading Operation

New Orleans Incident Command Post



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Planning Section Chief

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ICS 202

1. Incident Name	2. Incident Location / Date / Time	3. Incident Objectives ICS 202 - EPA
4. Incident Description		
5. Incident Response Objectives / Priorities / Key Deliverables / Resources		
6. Incident Response Strategy / Tactics / Methods / Tools		
7. Incident Response Status / Progress / Updates		
8. Incident Response Summary / Conclusions / Lessons Learned		
9. Incident Response Evaluation / Feedback / Recommendations		
10. Incident Response Sign-off / Approval / Date		

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ICS 202

1. Incident Name	2. Incident Location / Date / Time	3. Incident Objectives ICS 202 - EPA
4. Incident Description		
5. Incident Response Objectives / Priorities / Key Deliverables / Resources		
6. Incident Response Strategy / Tactics / Methods / Tools		
7. Incident Response Status / Progress / Updates		
8. Incident Response Summary / Conclusions / Lessons Learned		
9. Incident Response Evaluation / Feedback / Recommendations		
10. Incident Response Sign-off / Approval / Date		

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ICS 203

1. Incident Name	2. Incident Location / Date / Time	3. Incident Objectives ICS 203 - EPA
4. Incident Description		
5. Incident Response Objectives / Priorities / Key Deliverables / Resources		
6. Incident Response Strategy / Tactics / Methods / Tools		
7. Incident Response Status / Progress / Updates		
8. Incident Response Summary / Conclusions / Lessons Learned		
9. Incident Response Evaluation / Feedback / Recommendations		
10. Incident Response Sign-off / Approval / Date		

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# ICS 204

<b>1. Incident Name:</b> _____		<b>2. Department/Agency:</b> _____		<b>ADDITIONAL USE</b> <b>ICS 204 - 07/01</b>	
<b>3. District:</b> _____		<b>4. Supervisor/Incident Commander:</b> _____		<b>5. Incident Location:</b> _____	
<b>6. Incident Description:</b> _____		<b>7. Incident Type:</b> _____		<b>8. Incident Status:</b> _____	
<b>9. Incident Location:</b> _____		<b>10. Incident Location:</b> _____		<b>11. Incident Location:</b> _____	
<b>12. Incident Location:</b> _____		<b>13. Incident Location:</b> _____		<b>14. Incident Location:</b> _____	
<b>15. Incident Location:</b> _____		<b>16. Incident Location:</b> _____		<b>17. Incident Location:</b> _____	
<b>18. Incident Location:</b> _____		<b>19. Incident Location:</b> _____		<b>20. Incident Location:</b> _____	
<b>21. Incident Location:</b> _____		<b>22. Incident Location:</b> _____		<b>23. Incident Location:</b> _____	
<b>24. Incident Location:</b> _____		<b>25. Incident Location:</b> _____		<b>26. Incident Location:</b> _____	
<b>27. Incident Location:</b> _____		<b>28. Incident Location:</b> _____		<b>29. Incident Location:</b> _____	
<b>30. Incident Location:</b> _____		<b>31. Incident Location:</b> _____		<b>32. Incident Location:</b> _____	
<b>33. Incident Location:</b> _____		<b>34. Incident Location:</b> _____		<b>35. Incident Location:</b> _____	
<b>36. Incident Location:</b> _____		<b>37. Incident Location:</b> _____		<b>38. Incident Location:</b> _____	
<b>39. Incident Location:</b> _____		<b>40. Incident Location:</b> _____		<b>41. Incident Location:</b> _____	
<b>42. Incident Location:</b> _____		<b>43. Incident Location:</b> _____		<b>44. Incident Location:</b> _____	
<b>45. Incident Location:</b> _____		<b>46. Incident Location:</b> _____		<b>47. Incident Location:</b> _____	
<b>48. Incident Location:</b> _____		<b>49. Incident Location:</b> _____		<b>50. Incident Location:</b> _____	
<b>51. Incident Location:</b> _____		<b>52. Incident Location:</b> _____		<b>53. Incident Location:</b> _____	
<b>54. Incident Location:</b> _____		<b>55. Incident Location:</b> _____		<b>56. Incident Location:</b> _____	
<b>57. Incident Location:</b> _____		<b>58. Incident Location:</b> _____		<b>59. Incident Location:</b> _____	
<b>60. Incident Location:</b> _____		<b>61. Incident Location:</b> _____		<b>62. Incident Location:</b> _____	
<b>63. Incident Location:</b> _____		<b>64. Incident Location:</b> _____		<b>65. Incident Location:</b> _____	
<b>66. Incident Location:</b> _____		<b>67. Incident Location:</b> _____		<b>68. Incident Location:</b> _____	
<b>69. Incident Location:</b> _____		<b>70. Incident Location:</b> _____		<b>71. Incident Location:</b> _____	
<b>72. Incident Location:</b> _____		<b>73. Incident Location:</b> _____		<b>74. Incident Location:</b> _____	
<b>75. Incident Location:</b> _____		<b>76. Incident Location:</b> _____		<b>77. Incident Location:</b> _____	
<b>78. Incident Location:</b> _____		<b>79. Incident Location:</b> _____		<b>80. Incident Location:</b> _____	
<b>81. Incident Location:</b> _____		<b>82. Incident Location:</b> _____		<b>83. Incident Location:</b> _____	
<b>84. Incident Location:</b> _____		<b>85. Incident Location:</b> _____		<b>86. Incident Location:</b> _____	
<b>87. Incident Location:</b> _____		<b>88. Incident Location:</b> _____		<b>89. Incident Location:</b> _____	
<b>90. Incident Location:</b> _____		<b>91. Incident Location:</b> _____		<b>92. Incident Location:</b> _____	
<b>93. Incident Location:</b> _____		<b>94. Incident Location:</b> _____		<b>95. Incident Location:</b> _____	
<b>96. Incident Location:</b> _____		<b>97. Incident Location:</b> _____		<b>98. Incident Location:</b> _____	
<b>99. Incident Location:</b> _____		<b>100. Incident Location:</b> _____		<b>101. Incident Location:</b> _____	
<b>102. Incident Location:</b> _____		<b>103. Incident Location:</b> _____		<b>104. Incident Location:</b> _____	
<b>105. Incident Location:</b> _____		<b>106. Incident Location:</b> _____		<b>107. Incident Location:</b> _____	
<b>108. Incident Location:</b> _____		<b>109. Incident Location:</b> _____		<b>110. Incident Location:</b> _____	
<b>111. Incident Location:</b> _____		<b>112. Incident Location:</b> _____		<b>113. Incident Location:</b> _____	
<b>114. Incident Location:</b> _____		<b>115. Incident Location:</b> _____		<b>116. Incident Location:</b> _____	

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## PSC



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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

- ▶ 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

- 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
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- Facilitating a Tactics Meeting
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- PSC Toolbox/Go Kit (Quiz – includes all-module review)
- Demobilization and Transition Plans
- OPS Briefing Practice

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## Unit 15

### Planning Section Chief

*Strategies and Strategic Planning*

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## Unit Objectives – Strategies

- 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

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- ▶ 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

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**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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
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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!!

► 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?

```
graph LR; UC[UC] --> PSCOPS[PSC/OPS]; PSCOPS --> OPS[OPS]; UC --- UCList["• Objectives  
• ICS 202"]; PSCOPS --- PSCList["• Strategies  
• ICS 234"]; OPS --- OPSList["• Tactics  
• ICS 215"];
```

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### Considerations of Initial Strategy

► 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

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

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### Considerations of Initial Strategy

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

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### Clarifying Questions

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- 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?** PSC

- ▶ 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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**Who Can Suggest Modifications?** PSC  
(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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### 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: In response to a spill to create strategic plan for Hurricane Response and 90 days in future

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### Strategic Planning

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

- ▶ 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

- ▶ 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

Are you now able to?:

- ▶ 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 Summary – Strategies

Are you now able to?:

- ▶ 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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### Unit Quiz

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PSC Course Agenda - 2017		PSC
<ul style="list-style-type: none"><li>▶ Introduction (you are here)</li><li>▶ ICS Overview</li><li>▶ Planning Section Overview</li><li>▶ PSC Interactions (Quiz)</li><li>▶ Planning Cycle (Quiz)</li><li>▶ Overview of SITL</li><li>▶ Meeting Facilitation Skills</li><li>▶ Facilitating an Initial Unified Command Meeting</li><li>▶ Overview of RESL</li><li>▶ RESL Issues</li><li>▶ Facilitating the C&amp;GS Meeting</li><li>▶ Pre-Tactics Preparation Discussion</li></ul>	<ul style="list-style-type: none"><li>▶ Facilitating a Tactics Meeting</li><li>▶ Overview of the ENVL Position</li><li>▶ Facilitating a Planning Meeting</li><li>▶ ICS Forms (see below)</li><li>▶ Example IAP Review</li><li>▶ Strategies and Strategic Planning (Quiz)</li><li>▶ <b>Facilitating an Ops Briefing</b></li><li>▶ Information Gathering (Quiz)</li><li>▶ Documentation Unit Overview</li><li>▶ PSC Toolbox/Go Kit (Quiz – includes all-module review)</li><li>▶ Demobilization and Transition Plans</li><li>▶ OPS Briefing Practice</li></ul>	
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PSC Course Agenda - 2017

PSC

➤ Introduction (you are here)

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➤ Demobilization and Transition Plans

➤ OPS Briefing Practice

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Unit 16

Facilitating an Ops Briefing

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Operations Briefing

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➤ 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

OPERATIONAL PERIOD PLANNING CYCLE

TACTICS MEETING

PREPARING FOR THE TACTICS MEETING

COMMAND & GENERAL STAFF MEETING

IC/JUC DEVELOPS / SETS OBJECTIVES MEETING

INITIAL UIC MEETING

INCIDENT BRIEF ICS-201-EPA FORM

INITIAL RESPONSE AND ASSESSMENT

NOTIFICATIONS

INCIDENT / EVENT

PREPARING FOR THE PLANNING MEETING

PLANNING MEETING

IAP PREP & APPROVAL

EXECUTE PLAN & ASSESS PROGRESS

NEW OPS PERIOD BEGINS

Initial Response

Example:  
Ops Briefing = 0700

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Planning Section Chief


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### Planning Process



Operational Period Briefing

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### Conducting the Operational Briefing

- ▶ 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

- ▶ 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

- ▶ 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

- ▶ 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

- ▶ Intro / Ground Rules / Time Frame / Ops Period
- ▶ Incident Objectives
- ▶ Current Situation Update
- ▶ Weather Forecast
- ▶ Ops Org Chart
- ▶ Ops Assignments (204)
- ▶ Div/Grp Sup Mtg Note
- ▶ Safety Briefing
- ▶ Logistics Update
- ▶ Finance Issues
- ▶ Information Issues
- ▶ Interagency Issues
- ▶ Next Ops Briefing @ \_\_\_\_\_
- ▶ Closing Comments

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SITL/OPS

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Operations Briefing Agenda

Intro / Ground Rules / Time Frame / Ops Period

Incident Objectives

Current Situation Update

Weather Forecast

Ops Org Chart

Ops Assignments (204)

Div/Grp Sup Mtg Note

Safety Briefing

Logistics Update

Finance Issues

Information Issues

Interagency Issues

Next Ops Briefing @ \_\_\_\_\_

Closing Comments

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1. Incident Name:

LA Hurricane Response

2. Operational Period (Date/Time):

From: 0700 13 Dec 05 To: 0700 17 Dec 05

ICS 202: Incident Objectives

ICS 202-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 plans.

2) Conduct aggressive air, ground and water reconnaissance 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 (land, 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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Planning Section Chief

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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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### 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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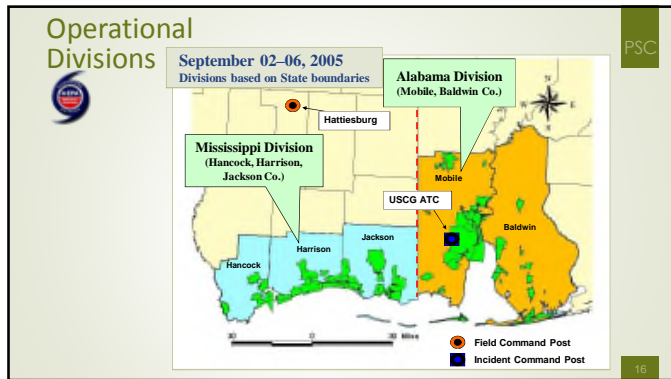
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**Operations Briefing Agenda**

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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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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# Facilitating an Operations Briefing

## Operations Briefing Agenda

- Intro / Ground Rules / Time Frame / Ops Period
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- Ops Org Chart
- Ops Assignments (204)
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- Logistics Update
- Finance Issues
- Information Issues
- Interagency Issues
- Next Ops Briefing @ \_\_\_\_\_
- Closing Comments

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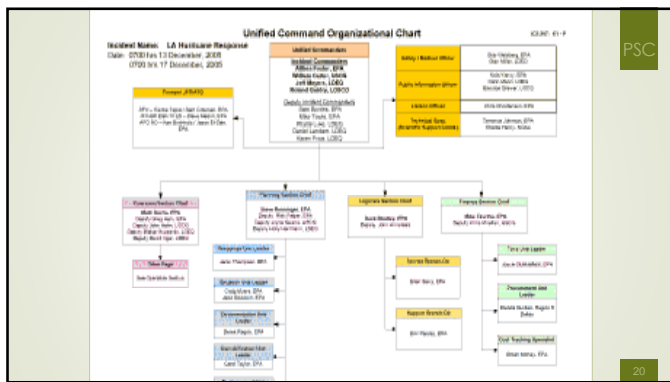
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## Operations Briefing Agenda

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- Safety Briefing
- Logistics Update
- Finance Issues
- Information Issues
- Interagency Issues
- Next Ops Briefing @ \_\_\_\_\_
- Closing Comments

PSC  
PSC  
SITL/OPS  
SITL  
OPS  
OPS  
SO  
LSC  
FSC  
PIO  
LNO  
PSC  
IC

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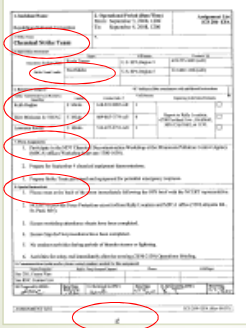
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# Facilitating an Operations Briefing

## ICS 204



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## PSC



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## Operations Briefing Agenda

- ▶ Intro / Ground Rules / Time Frame / Ops Period
- ▶ Incident Objectives
- ▶ Current Situation Update
- ▶ Weather Forecast
- ▶ Ops Org Chart
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## PSC

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Weather Forecast	SITL
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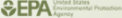
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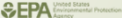
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### Planning Process

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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### Unit 17a

#### Planning Section Chief

*Information Gathering*

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### 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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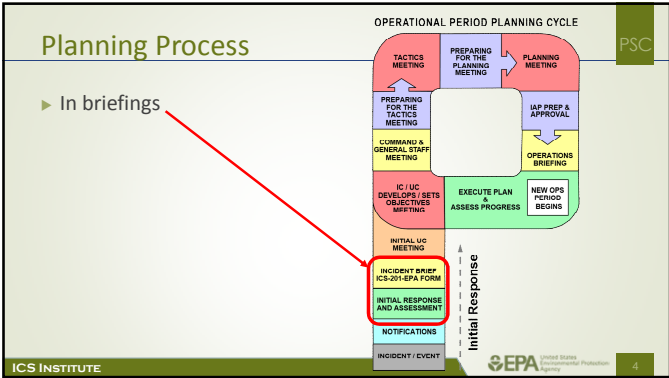
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**Transition Briefings**

► 3 Types

- ✓ RIC
- ✓ Initial I.C.
- ✓ Current IMT

► Should get two of them prior to assuming management

► May be done at same time

A photograph showing four individuals in ICS uniforms (yellow shirts, blue pants, and red vests). One person in the center is holding a document that has 'EPA PLAN' written on it. The background is dark. The photo is labeled 'PSC' in the top right corner and 'ICS INSTITUTE' and 'EPA' in the bottom left corner.

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**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

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► 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 NOAA need to be included with situation unit

► Typical routine responsibilities:

• Operational Briefing

• Command and General Staff Meeting

• Produce a 202 for the Planning Meeting

• Tactics Meeting

• Planning Meeting

• Sign the IAP and review Sitrep

► IAP:

• Resource 204 and updates and accurately reported

• Posting on webEOC. 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

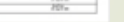
• Provide filing procedure and provide the serve of filing

• Scanning of all documents being produced





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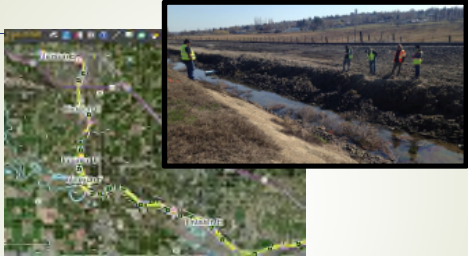
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Ongoing information and evaluation process of the Planning Section

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### 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

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### 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

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### EPA Model for National Incident Coordination

Incident Information

Policy and Guidance

Level of Coordination	Organizational Structure	Organizational Position	Role & Responsibilities
National Coordination	Policy Coordinating Committee HQ Emergency Operations Center (EOC) NICT	Administration, EM, RA, AAs National Incident Coordinator (NIC) HQ Center Management	Provides Strategic Direction/Management Objectives Communicates with the BIC and RIEOC Provides cross program support
Regional Coordination	EOC (RA) Regional Emergency Operations Center (REOC)	Regional Administrator Regional Incident Coordinator (RIC)	Provides strategic direction/management or information to assist program response Communicates to all participating departments
Technical Coordination	Incident Command System	Incident or Area Commander	Operational Decision Making

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### 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

PSC

- ▶ 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

PSC

- ▶ 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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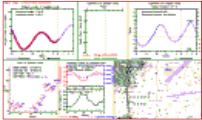

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### Situation Unit Leader

PSC

- ▶ 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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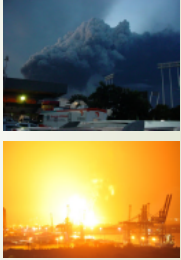
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### Environmental Unit Leader

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

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### Unit Quiz

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▶ Pre-Tactics Preparation Discussion	▶ 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

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### Large Fund Lead Response: Kalamazoo River

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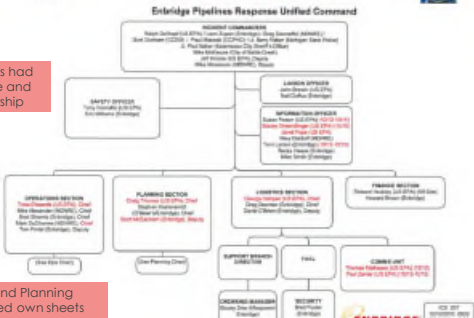
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PSC

Many KLPs had Fed, State and RP leadership



Ops and Planning needed own sheets for IAP.

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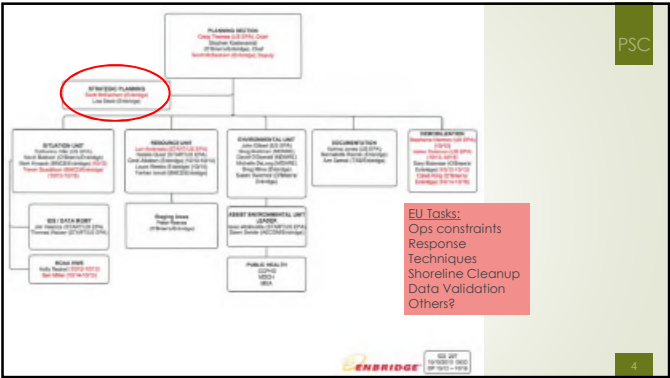
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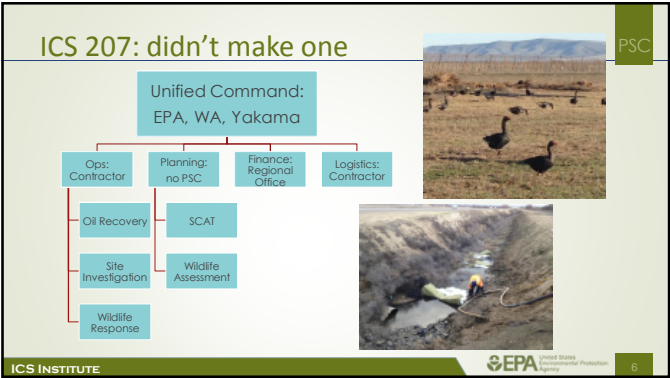
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Stafford Act:  
Hurricane Sandy

Mission: Disposal and WWTPs

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ICS 207: Sandy (Non-Ops)

PSC

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

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ICS 207: Sandy (Ops)

PSC

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

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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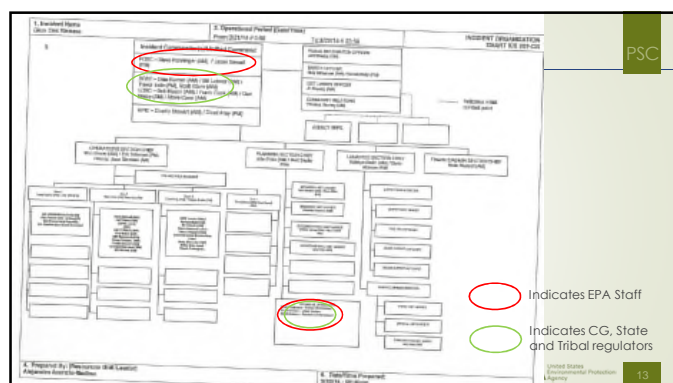
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- PSC Toolbox/Go Kit (Quiz – includes all-module review)
- Demobilization and Transition Plans
- OPS Briefing Practice

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## UNIT 16

### Documentation Unit Overview

Adapted from U.S. EPA Region V START Training

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### Introduction

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

INCIDENT  
COMMAND

OPERATIONS  
SECTION


PLANNING  
SECTION

LOGISTICS  
SECTION

FINANCE  
SECTION

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



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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)

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graph TD; PIO[PUBLIC INFORMATION OFFICER] --- IC[INCIDENT COMMAND]; LO[LIAISON OFFICER] --- IC; IC --- DU[DOCUMENTATION UNIT]; 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

PSC

**Unified**

**Command**

C000 C200

C000-RP C210

C000A C220

C000-RP(E) C230

C000-RP(D) C240

C000-RP(T) C250

C000-IREI C260

C000-IREI(C) C270

C171 C17H

C172 C17I

C173 C17K

C174 C17L

C175 C110

C176 C140

C177 C150

C178 C170

C179 C180

C17A C200

C17B C210

C17C C300

C17D C310

C17E C400

C17F C500

C17G C600

C980 C980

C981 C980

C982 C980

C983 C980

C984 C980

C985 C980

C986 C980

C987 C980

C988 C980

C989 C980

C990 C980

C991 C980

C992 C980

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C996 C980

C997 C980

C998 C980

C999 C980

C1000 C980

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C1243 C980

C1244 C98

[illegible]

# Establishing and Maintaining The Documentation Unit

PSC

- ▶ 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

PSU

- ▶ 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

- 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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[illegible]

# Document Processing In The Field

- ▶ Paper Document Processing Procedures
  - Document Organization and Control

UIC on first page: O680  
(Operations Section, Oil Recovery and Cleanup  
(O&M, SOTF, Dredging, Remediation))

SDMS DocID  
Barcode

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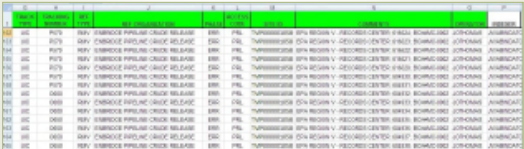
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Document Processing In The Field


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► Paper Document Processing Procedures – Continued

• Indexing Continued



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Document Processing In The Field

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► 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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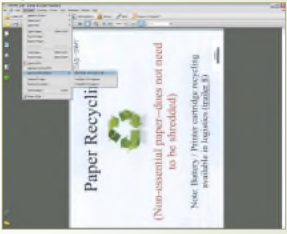
Document Processing In The Field

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► Paper Document Processing Procedures – Continued

► PDF Processing

• OCR



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Document Processing In The Field

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► Paper Document Processing Procedures – Continued

► PDF Processing

- OCR – Continued



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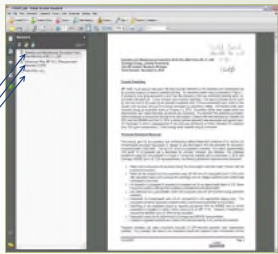
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Document Processing In The Field

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► Paper Document Processing Procedures – Continued

• PDF Processing



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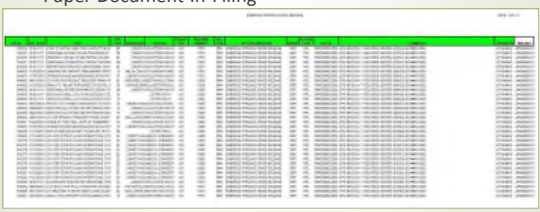
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Document Processing In The Field

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► Paper Document Processing Procedures – Continued

• Paper Document In-Filing



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Document Processing In The Field

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► 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

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► 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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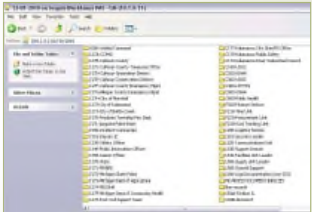
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Document Processing In The Field

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► 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

~ft Wash  
Comments.doc

~WRL0003.htm  
p

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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

File Name

File Size

Last Date Modified

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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

ELECTRONIC RECORD TARGET SHEET

File Name: [text box]

File Size: [text box]

File Type: [text box]

File Path: [text box]

File Date: [text box]

File Time: [text box]

File Extension: [text box]

File Content: [text box]

File Location: [text box]

File Status: [text box]

File Comments: [text box]

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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

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- OPS Briefing Practice

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## Unit 19

### PSC Toolbox / Go Kit

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### Unit Objectives OSC Toolbox/Go Kit

- 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 Go Kit Items



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

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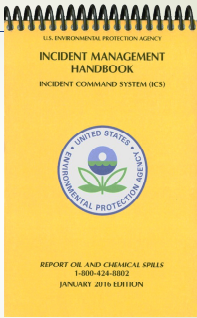
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### Pre-Incident References

- ▶ EPA IMH
- ▶ Mobilization Guides
- ▶ [www.epaossc.net/ICS\\_FORMS](http://www.epaossc.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](http://response.epa.gov/ICS_FORMS)
- ▶ Alternative sites
  - [Coast Guard ICS forms \(Homeport\)](http://CoastGuardICSforms(Homeport))
  - <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.nwcg.gov/publications/ics-forms>

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Unit Quiz

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PSC Course Agenda - 2017

- ▶ Introduction (you are here)
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- ▶ 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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- Demobilization and Transition Plans**
- OPS Briefing Practice

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### Unit 20

#### Demobilization and Transition Plans

*Mission and Function*

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### Demobilization Unit Functions

- 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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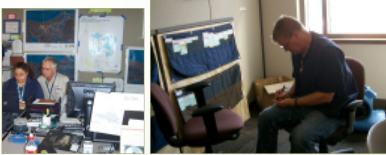
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### Demobilization Is:

- ▶ 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

- ▶ 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

**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

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

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### Demobilization Planning Meeting

- ▶ 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

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

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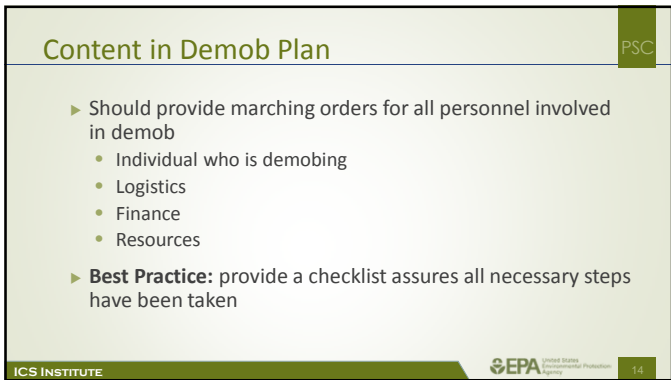
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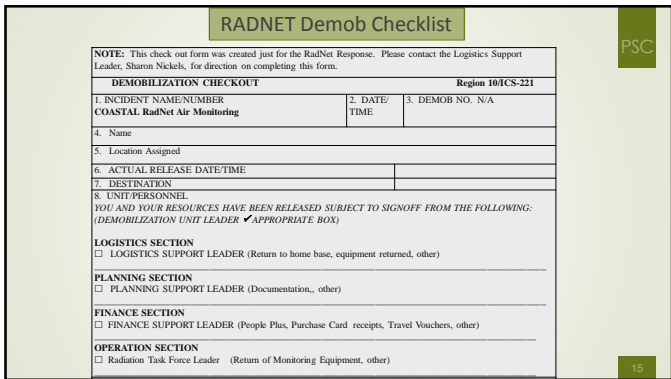
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Distributing the Plan

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- Incident Commander
- Command and General Staff
- All check-out locations
- Agency and Expanded Dispatch Centers
- Area Command
- Regional Response Center

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Implementing the Plan

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- Make sure responsibilities are understood by all involved
- Monitor the implementation; anticipate problems
- Coordinate the Plan and make sure the process is accomplishing the safe and orderly flow of resources off the incident
- Keep the Command and General Staff advised

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Demobilization Flow Chart

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graph TD
    ID[Incident Declaration] --> O[Operations Section Chief]
    O --> D[Demobilization Plan]
    D --> L[Logistics Section Chief]
    L --> C[Check-out Locations]
    C --> R[Resource Release]
    R --> F[Final Demobilization]
    F --> E[End of Incident]
    
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Planning Section Chief

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### Transition Planning for IMT

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- ▶ 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

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- ▶ 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

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- ▶ 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

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

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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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