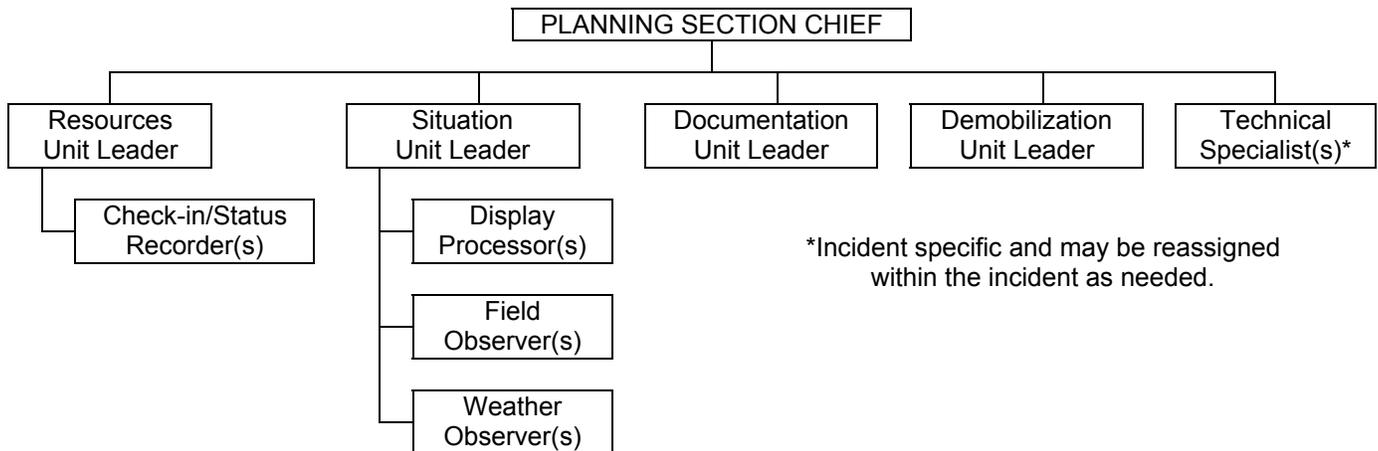


CHAPTER 8

PLANNING SECTION

Contents..... 8-1
Organization Chart..... 8-2
Planning Process 8-2
Position Checklists..... 8-3
 Planning Section Chief 8-3
 Resources Unit Leader..... 8-4
 Check-In/Status Recorder 8-4
 Situation Unit Leader 8-5
 Display Processor..... 8-5
 Field Observer 8-5
 Weather Observer 8-5
 Documentation Unit Leader..... 8-6
 Demobilization Unit Leader..... 8-6
 Technical Specialists 8-7
 Damage Inspection Technical Specialist 8-7
 Environmental Specialist 8-7
 Fire Behavior Specialist..... 8-8
 Geographic Information System Specialist 8-8
 Resource Use Specialist..... 8-9
 Training Specialist 8-9
 Water Resources Specialist..... 8-9
 Technical Specialist - Not Otherwise Specified (NOS) 8-10
Planning Section Planning Cycle Guide..... 8-11
Planning “P” 8-12

ORGANIZATION CHART



PLANNING PROCESS

The checklist below provides basic steps appropriate for use in almost any incident situation. However, not all incidents require written plans and the need for written plans and attachments is based on incident requirements and the decision of the Incident Commander.

The Planning Checklist is to be used with the Operational Planning Worksheet (ICS Form 215-G/W). For more detailed instructions, see Planning Section Chief Position Manual (ICS 221-1). The Operations Section Chief should have a draft Operational Planning Worksheet (ICS Form 215-G/W) and the Safety Officer should have a draft Incident Safety Analysis (ICS Form 215-AG/AW) completed prior to the planning meeting.

Incident Objectives and strategy should be established before the planning meeting. For this purpose it may be necessary to hold a strategy meeting prior to the planning meeting.

The Planning Process works best when the incident is divided into logical geographical and/or functional units. The tactics and resources are then determined for each of the planning units and then the planning units are combined into divisions/groups utilizing span-of-control guidelines.

The ICS Form 215-G/W (Operational Planning Worksheet -Generic and Wildland) and the ICS Form 215-AG/AW (Incident Safety Analysis – Generic and Wildland) are used to support the incident’s planning process. They provide the Incident Commander, Command and General Staff with the means to identify Division or Group assignments, develop specific tactics, identify available and needed resources, and address safety considerations. During this process, safety issues identified must be mitigated or new tactics developed which adequately address safety concerns.

CHECKLIST

PRIMARY RESPONSIBILITY

- 1. Briefing on situation and resource status PSC
- 2. Set/review incident objectives IC
- 3. Plot control lines, establish Branch and Division boundaries, identify Group assignments OSC
- 4. Specify tactics for each Division/Group..... OSC
- 5. Specify safety mitigation measures for identified hazards in Divisions/Groups SOF
- 6. Specify resources needed by Division/Group OSC, PSC
- 7. Specify Operations facilities and reporting locations – Plot on map..... OSC, PSC, LSC
- 8. Develop resource and personnel order LSC
- 9. Consider Communications, Medical, and Traffic Plan requirements PSC, LSC
- 10. Finalize, approve and implement Incident Action Plan..... PSC, IC, OSC

- IC = Incident Commander
- PSC = Planning Section Chief
- OSC = Operations Section Chief
- LSC = Logistics Section Chief
- SOF = Safety Officer

POSITION CHECKLISTS

PLANNING SECTION CHIEF (ICS 221-1) - The Planning Section Chief, a member of the Incident Commander's General Staff, is responsible for the collection, evaluation, dissemination and use of information about the development of the incident and status of resources. The Planning Section Chief is responsible for ensuring the safety and welfare of all Section personnel. Information is needed to: 1) understand the current situation, 2) predict probable course of incident events, and 3) prepare alternative strategies and control operations for the incident.

- a. Review Common Responsibilities (Page 1-2).
- b. Collect and process situation information about the incident.
- c. Supervise preparation of the Incident Action Plan.
- d. Provide input to the Incident Commander and Operations Section Chief in preparing the Incident Action Plan.
- e. Reassign out-of-service personnel already on-site to ICS organizational positions as appropriate.
- f. Establish information requirements and reporting schedules for Planning Section Units (e.g., Resources Unit and Situation Unit).
- g. Determine need for any specialized resources in support of the incident.
- h. If requested, assemble and disassemble strike teams and task forces not assigned to Operations.

- i. Establish special information collection activities as necessary, e.g., weather, environmental, toxics, etc.
- j. Assemble information on alternative strategies.
- k. Provide periodic predictions on incident potential.
- l. Report any significant changes in incident status.
- m. Compile and display incident status information.
- n. Oversee preparation and implementation of Incident Demobilization Plan.
- o. Incorporate plans, (e.g., Traffic, Medical, Communications, Site Safety) into the Incident Action Plan.
- p. Maintain Unit/Activity Log (ICS Form 214).

RESOURCES UNIT LEADER (ICS 221-3) - The Resources Unit Leader is responsible for maintaining the status of all assigned resources (primary and support) at an incident. This is achieved by overseeing the check-in of all resources, maintaining a status-keeping system indicating current location and status of all resources, and maintenance of a master list of all resources, e.g., key supervisory personnel, primary and support resources, etc.

- a. Review Common Responsibilities (Page 1-2).
- b. Review Unit Leader Responsibilities (Page 1-2).
- c. Establish check-in function at incident locations.
- d. Prepare Organization Assignment List (ICS Form 203) and Organization Chart (ICS Form 207).
- e. Prepare appropriate parts of Assignment Lists (ICS Form 204).
- f. Prepare and maintain the Command Post display (to include organization chart and resource allocation and deployment).
- g. Maintain and post the current status and location of all resources.
- h. Maintain master roster of all resources checked in at the incident.
- i. A Check-in/Status Recorder reports to the Resources Unit Leader and assists with the accounting of all incident-assigned resources.
- j. Maintain Unit/Activity Log (ICS Form 214).

CHECK-IN/STATUS RECORDER - Check-in/Status Recorders are needed at each check-in location to ensure that all resources assigned to an incident are accounted for.

- a. Review Common Responsibilities (Page 1-2).
- b. Obtain required work materials, including Check-in Lists (ICS Form 211), Resource Status Cards (ICS Form 219), and status display boards.
- c. Establish communications with the Communication Center and Ground Support Unit.
- d. Post signs so that arriving resources can easily find incident check-in location(s).
- e. Record check-in information on Check-in Lists (ICS Form 211).
- f. Transmit check-in information to Resources Unit on regular prearranged schedule or as needed.
- g. Forward completed Check-in Lists (ICS Form 211) to the Resources Unit.
- h. Receive, record, and maintain resource status information on Resource Status Cards (ICS Form 219) for incident assigned Single Resources, Strike Teams, Task Forces, and Overhead personnel.
- i. Maintain files of Check-in Lists (ICS Form 211).

SITUATION UNIT LEADER - The collection, processing and organizing of all incident information takes place within the Situation Unit. The Situation Unit may prepare future projections of incident growth, maps and intelligence information.

- a. Review Common Responsibilities (Page 1-2).
- b. Review Unit Leader Responsibilities (Page 1-2).
- c. Begin collection and analysis of incident data as soon as possible.
- d. Prepare, post, or disseminate resource and situation status information as required, including special requests.
- e. Prepare periodic predictions or as requested.
- f. Prepare the Incident Status Summary (ICS Form 209).
- g. Provide photographic services and maps if required.
- h. Maintain Unit/Activity Log (ICS Form 214).

DISPLAY PROCESSOR - The Display Processor is responsible for the display of incident status information obtained from Field Observers, resource status reports, aerial and orthography photographs and infrared data.

- a. Review Common Responsibilities (Page 1-2).
- b. Determine location of work assignment
- c. Determine numbers, types and locations of displays required.
- d. Determine map requirements for Incident Action Plans.
- e. Determine time limits for completion.
- f. Obtain information from Situation Unit.
- g. Obtain necessary equipment and supplies.
- h. Obtain copy of Incident Action Plan for each operational period.
- i. Assist Situation Unit Leader in analyzing and evaluating field reports.
- j. Develop required displays in accordance with time limits for completion.
- k. Maintain Unit/Activity Log (ICS Form 214).

FIELD OBSERVER - The Field Observer is responsible to collect situation information from personal observations at the incident and provide this information to the Situation Unit Leader.

- a. Review Common Responsibilities (Page 1-2).
- b. Obtain copy of Incident Action Plan for the Operational Period.
- c. Obtain necessary equipment and supplies.
- d. Identify all facility locations (e.g., Helispots, Division and Branch boundaries).
- e. Report information to Situation Unit by established procedure.
- f. Report immediately any condition observed which may cause danger and safety hazard to personnel.
- g. Gather intelligence that will lead to accurate predictions.
- h. Maintain Unit/Activity Log (ICS Form 214).

WEATHER OBSERVER - The Weather Observer is responsible to collect current incident weather information and provide the information to an assigned meteorologist, Fire Behavior Specialist or Situation Unit Leader.

- a. Review Common Responsibilities (Page 1-2).
- b. Obtain weather data collection equipment.
- c. Obtain appropriate transportation to collection site(s).
- d. Record and report weather observations at assigned locations on schedule.
- e. Turn in equipment at completion of assignment.
- f. Demobilize according to Incident Demobilization Plan.
- g. Demobilize incident displays in accordance with Incident Demobilization Plan.
- h. Maintain Unit/Activity Log (ICS Form 214).

DOCUMENTATION UNIT LEADER (ICS 221-10) - The Documentation Unit Leader is responsible for the maintenance of accurate, up-to-date incident files. The Documentation Unit will also provide duplication services. Incident files will be stored for legal, analytical, and historical purposes.

- a. Review Common Responsibilities (Page 1-2).
- b. Review Unit Leader Responsibilities (Page 1-2).
- c. Set up work area and begin organization of incident files.
- d. Establish duplication service; respond to requests.
- e. File all official forms and reports.
- f. Review records for accuracy and completeness; inform appropriate units of errors or omissions.
- g. Provide incident documentation as requested.
- h. Store files for post-incident use.
- i. Maintain Unit/Activity Log (ICS Form 214).

DEMOBILIZATION UNIT LEADER (ICS 221-4) - The Demobilization Unit Leader is responsible for developing the Incident Demobilization Plan. On large incidents, demobilization can be quite complex, requiring a separate planning activity. Note that not all agencies require specific demobilization instructions.

- a. Review Common Responsibilities (Page 1-2).
- b. Review Unit Leader Responsibilities (Page 1-2).
- c. Review incident resource records to determine the likely size and extent of demobilization effort.
- d. Based on above analysis, add additional personnel, workspace and supplies as needed.
- e. Coordinate demobilization with Agency Representatives.
- f. Monitor ongoing Operations Section resource needs.
- g. Identify surplus resources and probable release time.
- h. Develop incident checkout function for all units.
- i. Evaluate logistics and transportation capabilities to support demobilization.
- j. Establish communications with off-incident facilities, as necessary.
- k. Develop an Incident Demobilization Plan detailing specific responsibilities and release priorities and procedures.
- l. Prepare appropriate directories (e.g., maps, instructions, etc.) for inclusion in the demobilization plan.
- m. Distribute demobilization plan (on and off-site).
- n. Ensure that all Sections/Units understand their specific demobilization responsibilities.

- o. Supervise execution of the Incident Demobilization Plan.
- p. Brief Planning Section Chief on demobilization progress.
- q. Maintain Unit/Activity Log (ICS Form 214).

TECHNICAL SPECIALISTS (ICS 221-5) - Certain incidents or events may require the use of Technical Specialists who have specialized knowledge and expertise. Technical Specialists may function within the Planning Section, or be assigned wherever their services are required. Specific Technical Specialists have been identified (i.e. weather, fire behavior, etc.) and specific checklists are listed below or in the specific Operational System Description (i.e. US&R). For all other Technical Specialists not otherwise specified, use the checklist at the end of this section.

DAMAGE INSPECTION TECHNICAL SPECIALIST (ICS-221-5) - The Damage Inspection Technical Specialist is primarily responsible for inspecting damage and/or potential “at-risk” property, and natural resources. The Damage Inspection Technical Specialists usually function within the Planning Section and may be assigned to the Situation Unit or can be reassigned wherever their services are required. Damage inspection includes loss of environmental resources, infrastructure, transportation, structures, and other real/personal property.

- a. Review Common Responsibilities (Page 1-2)
- b. Establish communications with local government representatives of effective jurisdictions.
- c. Determine and order resources.
- d. Determine coordination procedures with other sections, units and local agencies.
- e. Establish work area, and obtain necessary supplies.
- f. Collect information pertaining to incident causes losses.
- g. Participate in Planning Section activities.
- h. Prepare documentation as required.
- i. Respond to requests for information from approved sources.
- j. Prepare final Situation Status Field Inspection Report (SSFIR), and forward to the Documentation Unit Leader.
- k. Maintain Unit/Activity Log (ICS Form 214).

ENVIRONMENTAL SPECIALIST – The Environmental Specialist is primarily responsible for accessing the potential impacts of an incident on the environment, determining environmental restrictions, recommending alternative strategies and priorities for addressing environmental concerns. The Environmental Specialist functions within the Planning Section as part of the Situation Unit.

- a. Review Common Responsibilities (Page 1-2).
- b. Participate in the development of the Incident Action Plan and review the general control objectives including alternative strategies.
- c. Collect and validate environmental information within the incident area by reviewing pre-attack land use and management plans.
- d. Determine environmental restrictions within the incident area.
- e. Develop suggested priorities for preservation of the environment.
- f. Provide environmental analysis information, as requested.

- g. Collect and transmit required records and logs to Documentation Unit at the end of each operational period.
- h. Maintain Unit/Activity Log (ICS Form 214).

FIRE BEHAVIOR SPECIALIST - The Fire Behavior Specialist is primarily responsible for establishing a weather data collection system, and to develop required fire behavior predictions based on fire history, fuel, weather, and topography information.

- a. Review Common Responsibilities (Page 1-2).
- b. Establish weather data requirements.
- c. Verify dispatch of meteorologist.
- d. Confirm that mobile weather station has arrived and is operational.
- e. Inform meteorologist of weather data requirements.
- f. Forward weather data to Planning Section Chief.
- g. Collect, review and compile fire history data.
- h. Collect, review and compile exposed fuel data.
- i. Collect, review and compile information about topography and fire barriers.
- j. Provide weather information and other pertinent information to Situation Unit Leader for inclusion in Incident Status Summary (ICS Form 209).
- k. Review completed Incident Status Summary report and Incident Action Plan.
- l. Prepare fire behavior prediction information at periodic intervals or upon request and forward to Planning Section Chief.
- m. Maintain Unit/Activity Log (ICS Form 214).

GEOGRAPHICAL INFORMATION SYSTEM SPECIALIST - A Technical Specialist - GIST is responsible for spatial information collection, display, analysis, and dissemination. The Technical Specialist GIS will provide Global Positioning System (GPS) support, integrate infrared data, and incorporate all relevant data to produce map products, statistical data for reports, and/or analyses. Technical Specialist - GIS usually functions within the Planning Section, or assigned wherever their services are required within the incident organization.

- a. Review Common Responsibilities (Page 1-2).
- b. Check in with the Check-In/Status Recorder.
- c. Obtain briefing from appropriate supervisor.
- d. Establish communication with local government representatives, of all affected jurisdictions, through the incident Liaison Officer.
- e. Determine and order resources needed.
- f. Determine coordination procedures with other sections, units, and local agencies.
- g. Establish work area, and acquire work materials.
- h. Obtain appropriate transportation and communications.
- i. Determine the availability of needed GIS support products.
- j. Participate in Planning Section activities.
- k. Prepare GIS products as determined by supervisor.
- l. Keep supervisor informed.
- m. Respond to requests from approved sources for additional GIS products.
- n. Prepare final GIS summary report consisting of all incident GIS products and forward to Documentation Unit Leader.
- o. Maintain Unit/Activity Log (ICS Form 214).

RESOURCE USE SPECIALIST – The Resource Use Specialist is primarily responsible for advising incident personnel on the specific capabilities, limitations of certain specialized response resources. In addition, the Resource Specialist can recommend strategies for use of these resources.

- a. Review Common Responsibilities (Page 1-2).
- b. Participate in the development of the Incident Action Plan and review general control objectives including alternative strategies as requested.
- c. Collect information on incident resources as needed.
- d. Respond to requests for information about limitations and capabilities of resources.
- e. Collect and transmit records and logs to Documentation Unit at the end of each operational period.
- f. Maintain Unit/Activity Log (ICS Form 214).

TRAINING SPECIALIST – The Training Specialist coordinates incident training opportunities and activities, ensuring the quality of the training assignments and completing documentation of the incident training. The Training Specialist organizes and implements the incident training program and analyzes and facilitates training assignments to fulfill individual development needs of trainees.

- a. Review Common Responsibilities (Page 1-2).
- b. Inform Planning Section Chief of planned use of trainees.
- c. Review trainee assignments and modify if appropriate.
- d. Coordinate the assignments of trainees to incident positions with Resources Unit.
- e. Brief trainees and trainers on training assignments and objectives.
- f. Coordinate use of unassigned trainees.
- g. Make follow-up contacts on the job to provide assistance and advice for trainees to meet training objectives as appropriate and with approval of unit leaders.
- h. Ensure trainees receive performance evaluation.
- i. Monitor operational procedures and evaluate training needs.
- j. Respond to requests for information concerning training activities.
- k. Give Training Specialist records and logs to Documentation Unit at the end of each operational period.
- l. Maintain Unit/Activity Log (ICS Form 214).

WATER RESOURCE SPECIALIST – The Water Resource Specialist is primarily responsible to advise incident personnel on the sources of fire suppression water, the capabilities of the water sources, and to assist in the development of additional systems or system capability to meet incident demands.

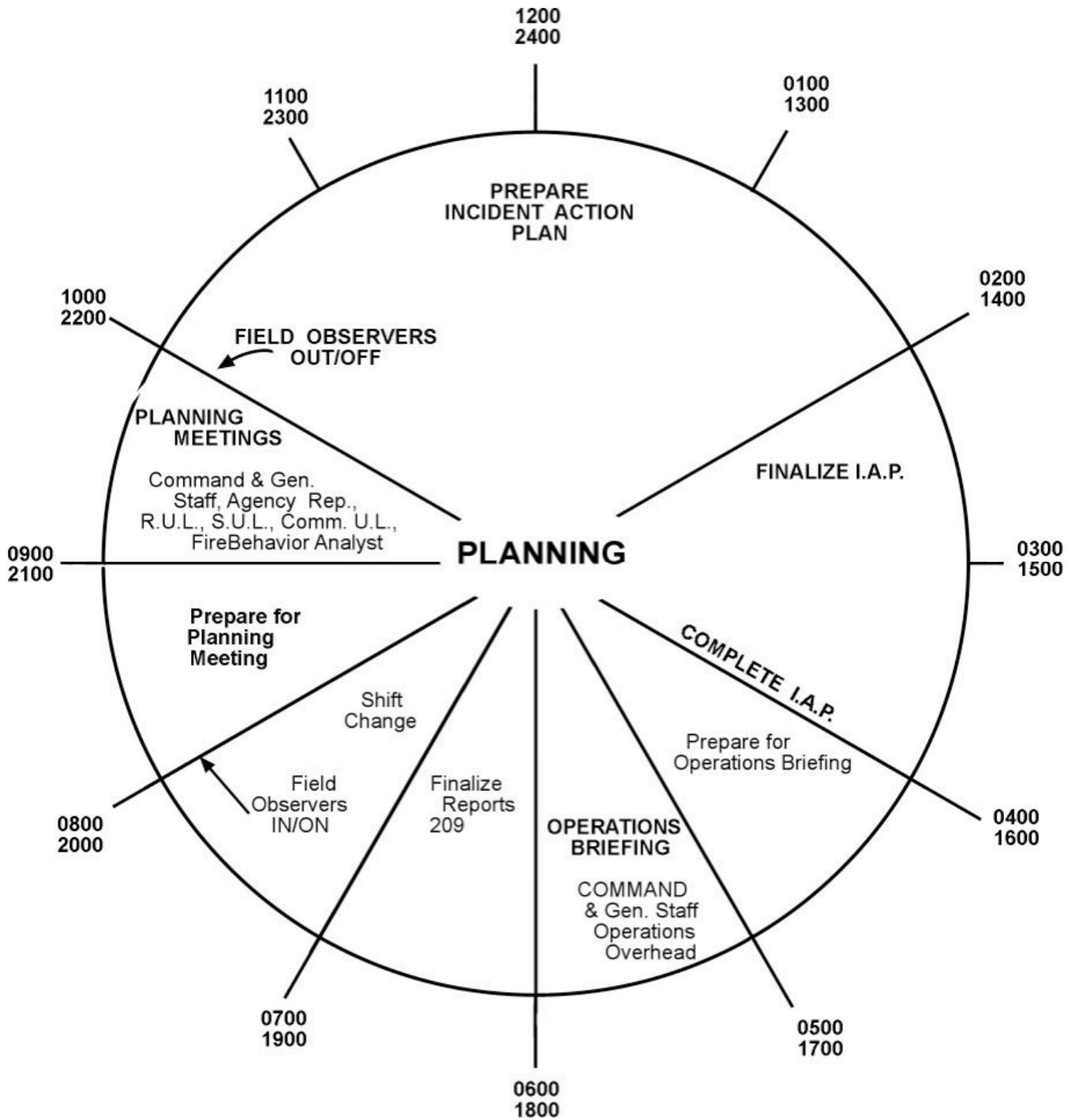
- a. Review Common Responsibilities (Page 1-2).
- b. Participate in the development of the Incident Action Plan and review general control objectives, including alternative strategies presently in effect.
- c. Collect and validate water resource information within the incident area.
- d. Prepare information on available water resources.
- e. Establish water requirements needed to support fire suppression actions.

- f. Compare Incident Control Objectives as stated in the Plan, with available water resources and report inadequacies or problems to Planning Section Chief.
- g. Participate in the preparation of Incident Action Plan when requested.
- h. Respond to requests for water information.
- i. Collect and transmit records and logs to Documentation Unit at the end of each operational period.
- j. Maintain Unit/Activity Log (ICS Form 214).

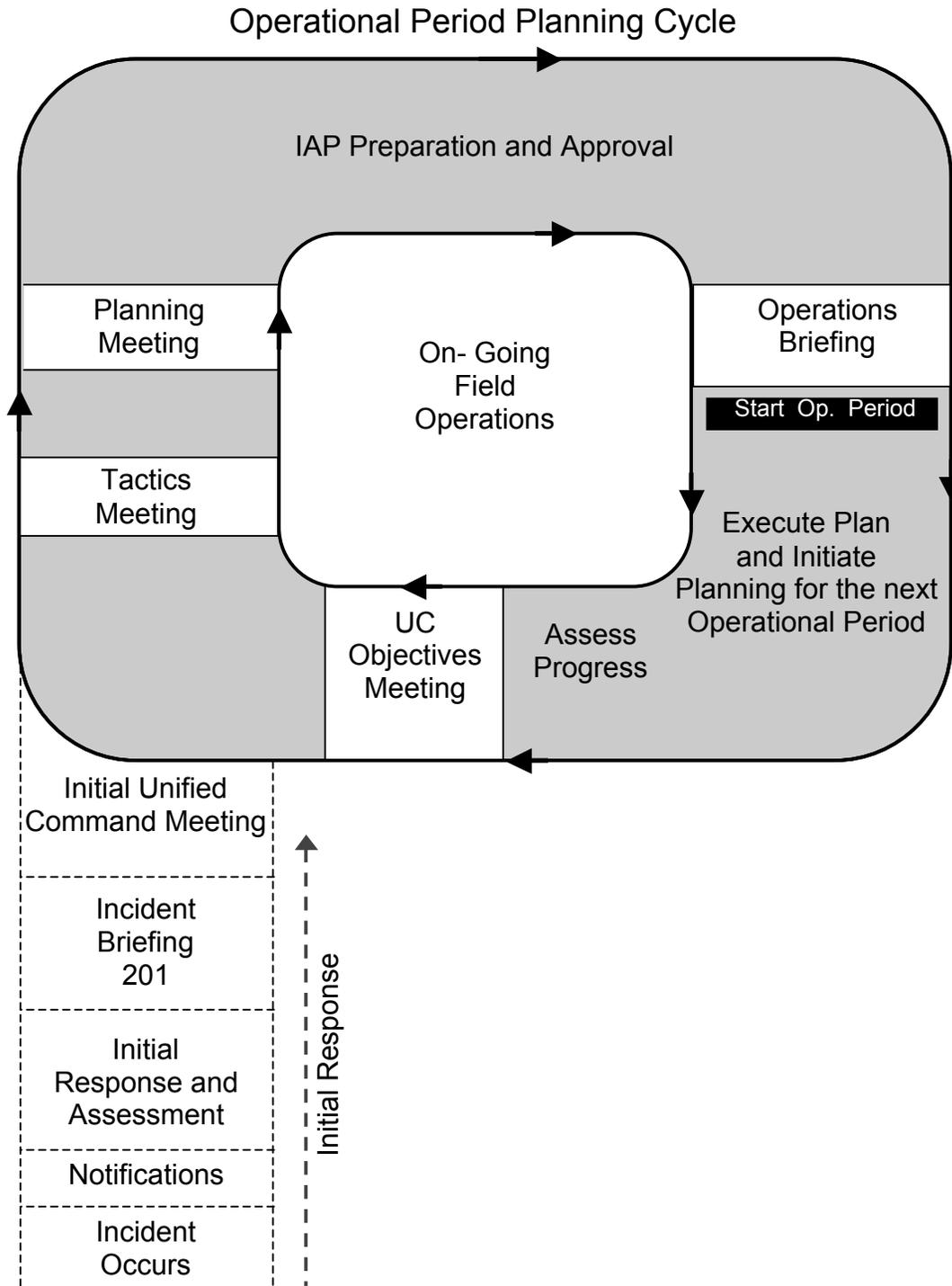
TECHNICAL SPECIALISTS (NOT OTHERWISE SPECIFIED)

- a. Review Common Responsibilities (Page 1-2).
- b. Check in with the Check-In/Status Recorder.
- c. Obtain briefing from supervisor.
- d. Obtain personal protective equipment as appropriate.
- e. Determine coordination procedures with other sections, units, and local agencies.
- f. Establish work area and acquire work materials.
- g. Participate in the development of the Incident Action Plan and review the general control objectives including alternative strategies as appropriate.
- h. Obtain appropriate transportation and communications.
- i. Keep supervisor informed.
- j. Maintain Unit/Activity Log (ICS Form 214).

Planning Section Planning Cycle Guide



Example Based on 12-Hour Operational Period



Planning "P": Planning Process Alternative - U.S. Coast Guard Model