

**CHAPTER 5  
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**PLANNING SECTION**

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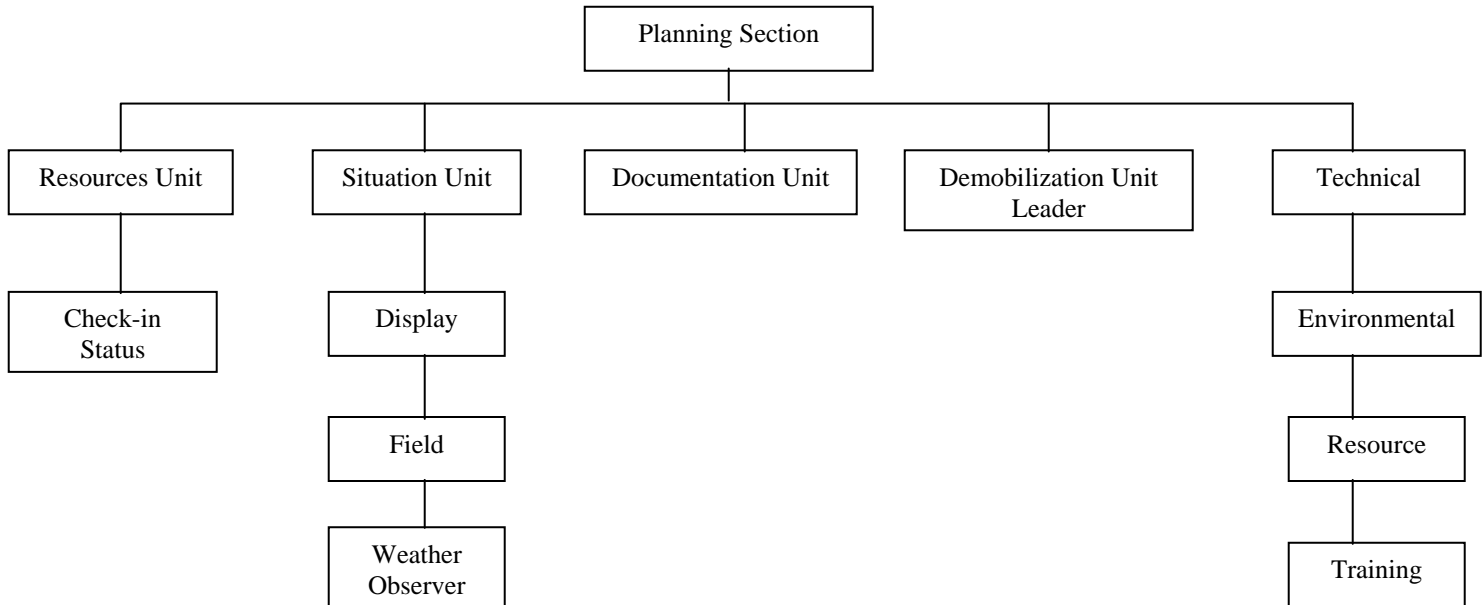
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## ORGANIZATION CHART



## POSITION CHECKLISTS

**PLANNING SECTION CHIEF:** 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. 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, Situation Units).

- g. Determine need for any specialized resources in support of the incident.
- h. If requested, assemble and disassemble strike teams and task forces as requested by 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).

### **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 are based on incident requirements and the decision of the Incident Commander.

The Planning Checklist is intended to be used with the Operational Planning Worksheet (ICS Form 215). The Operations Section Chief should have a draft Operational Planning Worksheet (ICS Form 215) 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 perimeter and proposed control lines are divided into logical geographical units for planning purposes. 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 215A, LCES Safety Analysis, is intended to highlight potential problem areas. The Incident Commander, Command and General Staff would then consider reasonable mitigation actions or select a different strategic or tactical approach.

<i>CHECKLIST</i>	<i>PRIMARY RESPONSIBILITY</i>
1. Briefing on situation and resource status .....	PSC
2. Set control objectives.....	IC
3. Plot control lines, establish division boundaries/ group assignments.....	OPS
4. Specify tactics/safety for each division .....	SO, OPS
5. Specify resources needed by Division/Group.....	OPS, PSC
6. Specify Operations facilities, reporting locations/Plot on map ..	OPS, PSC, LSC
7. Place resource and personnel order .....	LSC
8. Consider Communications, Medical, Site Safety, and Traffic Plan requirements .....	SO, PSC, LSC
9. Finalize, approve and implement Incident Action Plan .....	PSC, IC, OPS

- IC = Incident Commander
- PSC = Planning Section Chief
- OPS = Operations Section Chief
- LSC = Logistics Section Chief
- SO = Safety Officer

**RESOURCES UNIT LEADER:** 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 supervisor personnel, primary and support resources, etc.

- a. Review Common Responsibilities (page 1-2).
- b. Review Unit Leader Responsibilities (page 1-3).
- 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 Division 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.

**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 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 pre-arranged schedule or as needed.
- g. Forward completed Check-in Lists (ICS Form 211) and Status Change Cards (ICS Form 210) to the Resources Unit.
- h. Receive, record, and maintain resources 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 organization 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 1-3).
- 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 Form (ICS Form 209).
- g. Provide photographic services and maps if required.

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

- a. Review Common Responsibilities (page 1-2).
- b. Determine:
  - Location of work assignment.
  - Numbers, types and locations of displays required.
  - Priorities.
  - Map requirements for Incident Action Plans.
  - Time limits for completion.
  - Field Observer assignments and communications means.
  - Obtain necessary equipment and supplies.
- c. Obtain copy of Incident Action Plan for each operational period.
- d. Assist Situation Unit Leader in analyzing and evaluating field reports.
- e. Develop required displays in accordance with time limits for completion.

**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. Determine:
  - Location of assignment.
  - Type of information required.
  - Priorities.
  - Time limits for completion.
  - Method of communication.
  - Method of transportation.

- c. Obtain copy of Incident Action Plan for the Operation Period.
- d. Obtain necessary equipment and supplies.
- e. Perform Field Observer responsibilities to include but not limited to the following:
  - Map perimeters of incident.
  - Map locations of hot spots.
  - Map unburned islands.
  - Observe rates of spread.
  - Observe weather conditions.
  - Observe hazards, including escape routes and safe areas.
  - Observe progress of operational resources.
- f. Be prepared to identify all facility locations (e.g., helispots, Division and Branch boundaries).
- g. Report information to Situation Unit Leader by established procedure.
- h. Report immediately any condition observed which may cause danger and safety hazard to personnel.
- i. Gather intelligence that will lead to accurate predictions.

**WEATHER OBSERVER:** The Weather Observer is responsible to collect current incident weather information and provide the information to an assigned meteorologist or Situation Unit Leader.

- a. Review Common Responsibilities (page 1-2).
- b. Determine:
  - Nature and location of work assignments.
  - Weather data collection methods to be used.
  - Priorities for collection.
  - Specific types of information required.
  - Frequency of reports.
  - Method of reporting.
  - Source of equipment.
- c. Obtain weather data collection equipment.
- d. Obtain appropriate transportation to collection site(s).
- e. Record and report weather observations at assigned locations on

- schedule.
- f. Turn in equipment at completion of assignment.

**DOCUMENTATION UNIT LEADER:** The Documentation Unit Leader is responsible for the maintenance of accurate, up-to-date incident files. Duplication services will also be provided by the Documentation Unit. Incident files will be stored for legal, analytical, and historical purposes.

- a. Review Common Responsibilities (page 1-2).
- b. Review unit Leader Responsibilities (page 1-3).
- c. Set up work area; 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.

**DEMOBILIZATION UNIT LEADER:** 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 1-3).
- c. Review incident resource records to determine the likely size and extent of demobilization effort.
- d. Based on above analysis, add additional personnel, work space and supplies as needed.
- e. Coordinate demobilization with Agency Representatives.
- f. Monitor ongoing Operations Section resource needs.
- g. Identify surplus resources and probably\_release time.
- h. Develop incident check-out 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.

**TECHNICAL SPECIALISTS:** 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.

**ENVIRONMENTAL SPECIALIST:**

- 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).

**RESOURCE USE SPECIALIST:**

- 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:**

- 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).

PLANNING SECTION PLANNING CYCLE GUIDE

