

NATIONAL QUALIFICATION SYSTEM (NQS)

POSITION TASK BOOKFOR THE POSITION OF

PLANNING SECTION CHIEF

Version: September 2017

Check the appropriate position type: Single Type Type 2 Type 3 Type 1 POSITION TASK BOOK ASSIGNED TO: TRAINEE'S NAME: **DUTY STATION:** PHONE NUMBER: E-MAIL: POSITION TASK BOOK INITIATED BY: **OFFICIAL'S NAME:** TITLE: **DUTY STATION:** PHONE NUMBER: E-MAIL: POSITION TASK BOOK WAS INITIATED: LOCATION: DATE:

Evaluator Verification

(Do <u>not</u> complete this form unless you are recommending the trainee for all-hazards certification.)

FINAL EVALUATOR VERIFICATION
I verify that
has successfully completed all tasks as a trainee and should therefore be considered for certification in this position. I also verify that all tasks are documented with appropriate initials.
FINAL EVALUATOR'S SIGNATURE:
DATE:
FINAL EVALUATOR'S PRINTED NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
Documentation of Agency Certification
DOCUMENTATION OF AGENCY CERTIFICATION
I certify that
has successfully met all of the criteria set out in the National Incident Management System (NIMS) Job Title/Position Qualifications document for the position and will hereby receive certification of his/her qualification.
OFFICIAL'S SIGNATURE:
DATE:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
E-MAIL:

Position Task Book Overview

The Position Task Book (PTB) documents the performance criteria a trainee must meet to be certified for a position within the National Qualification System (NQS). The performance criteria are associated with core NQS competencies, behaviors, and tasks.

A trainee may not work on multiple position type PTBs for a specific position at the same time; for example, a trainee may not simultaneously work on a Type 1 Incident Commander PTB and a Type 2 Incident Commander PTB. If a position has multiple types, the trainee must, in most cases, qualify at the lowest type before pursuing the next higher type. For example, before seeking qualification for a Type 1 position, an individual must first qualify at the Type 3 level and then at the Type 2 level.

Evaluation Process

- Evaluators observe and review a trainee's completion of PTB tasks, initialing and dating each successfully completed task in the PTB.
- Evaluators complete an Evaluation Record Form after each evaluation period by documenting the trainee's performance.
- The Authority Having Jurisdiction (AHJ) may not have enough resources to ensure that every evaluator is qualified in the position being assessed. Therefore, a trainee's supervisor may evaluate the completion of PTB tasks. For example, a Logistics Section Chief has the authority to sign off on completed PTB tasks for a Food Unit Leader trainee.
- The final evaluator is a leader who verifies that a trainee has completed the PTB and met all requirements for the position. A final evaluator is generally qualified in the same position for which the trainee is applying. When possible, the evaluator and the final evaluator should not be the same person, but in situations with limited resources, the evaluator can also serve as the final evaluator.
- Once the final evaluator has completed the Final Evaluator Verification, he/she forwards it to the Quality Review Board (QRB) along with supporting evidence that the trainee has completed all position requirements.
- After the QRB review, the AHJ completes the Documentation of Agency Certification form as appropriate.

Transferring Qualifications

- Personnel who have documentation of previous education, training, or significant on-the-job incident experience may receive credit toward qualification for a given position. Each AHJ establishes the requirements for transferring qualifications from another AHJ.
- If an AHJ chooses not to accept a trainee's existing certification of qualification, the trainee may be reevaluated in the specific position and issued a new PTB.
- An individual may hold multiple certifications of qualification (that is, the Final Evaluator Verification form and the Documentation of Agency Certification form) along with the completed PTB.

Position Task Book Competencies, Behaviors, and Tasks

The PTB sets minimum criteria for certification for a position. The AHJ has the authority to add content to the baseline PTB competencies, behaviors, and tasks as necessary.

The PTB covers all type levels for a given position, but a trainee may check only one "Type" box and work on only one type at a time. (The National Incident Management System (NIMS) Job Title/Position Qualifications document describes all types.)

Command and General Staff job titles/positions qualifications are typed based on incident complexity, while all other NIMS positions are typed based on the minimum qualifications.

Definitions

Competency: An observable, measurable pattern of knowledge, skills, abilities, and other characteristics an individual needs to perform an activity and its associated tasks. A competency specifies the skillset a person needs to possess to complete the tasks successfully.

Behavior: An observable work activity or a group of similar tasks necessary to perform the activity.

Task: A specific, demonstrable action necessary for successful performance in a position. Trainees must demonstrate completion of required tasks.

- Occasionally, PTB tasks are unique to one of the types; for example, certain tasks apply only to a Type 3 Incident Commander, not to a Type 2 or Type 1 Incident Commander. In those cases, the PTB indicates the corresponding type at the beginning of the task.
- All tasks require evaluation; however, bullet statements within a task are examples.

PTB Task Codes

Each task in the PTB model has at least one corresponding code conveying the circumstances in which the trainee can perform the task for evaluation. Evaluators may assess trainees during incidents, in classroom simulations and training sessions, in functional and full-scale exercises, and in other work situations. If a task has multiple codes, the evaluator may evaluate in ANY of those circumstances; the trainee does not need evaluation in all of the listed circumstances.

Code C: Task performed in training or classroom setting, including seminars and workshops.

Code E: Task performed during a full-scale exercise with equipment deployed under the Incident Command System (ICS).

Code F: Task performed during a functional exercise managed under the ICS.

Code I: Task performed during an incident or event managed under the ICS. Examples include oil spill, search and rescue operation, hazardous materials (hazmat) response, fire, and emergency or non-emergency (planned or unplanned) events.

Code J: Task performed as part of day-to-day job duties.

Code T: Task performed during a tabletop exercise.

Code R: Task performed very rarely and required only if applicable to the event.

How to Complete the Evaluation Record Form

Each Evaluation Record Form (see next page) covers one evaluation period. Evaluation periods may involve incidents, classroom simulations, or daily duties, depending on what the PTB recommends. The AHJ determines the number of evaluations required for position qualification and certification. If evaluators need additional evaluation periods, they can copy pages from a blank PTB and attach them to the PTB in question.

Complete these items AT THE START of the evaluation period:

Evaluation Record Number: Label each evaluation record with a number to identify the incident(s), exercise(s), or event(s) during which the trainee completed the PTB tasks. The evaluator should also write this number in the PTB column labeled "Evaluation Record #" for each task performed satisfactorily. This number enables reviewers of the completed PTB to ascertain the evaluators' qualifications before signing off on the PTB.

Evaluator's name; Incident/office title and agency: List the name of the evaluator, his/her incident position or office title, and the evaluator's home agency.

Evaluator's home unit address and phone: List evaluator's home unit address and phone number.

Name and location of incident or simulation/exercise: Identify the name (if applicable) and location where the trainee performed the tasks.

Incident kind: Enter the kind of incident (such as hazmat, law enforcement, wildland fire, structural fire, search and rescue, flood, or tornado).

Complete these items AT THE END of the evaluation period:

Number and kind of resources: Enter the number of resources assigned to the incident, and their kind (such as team, personnel, and equipment) pertinent to the trainee's PTB.

Evaluation period: Enter inclusive dates of trainee evaluation. This time span may cover several small, similar incidents.

Position type: Enter position type (such as Type 3, Type 2, Type 1, or Single Type).

Recommendation: Check the appropriate line and make comments below regarding the trainee's future development needs.

Additional recommendations/comments: Provide additional recommendations and comments about trainee, as necessary.

Date: List the current date.

Evaluator's initials: Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.

Evaluator's relevant qualification: List your certification relevant to the trainee position you supervised.

Evaluation Record Form

TRAINEE NAME:
TRAINEE POSITION:
Evaluation Record Number:
Evaluator's name:
Incident/office title and agency:
Evaluator's home unit address and phone:
Name and location of incident or simulation/exercise:
Incident kind:
Number and kind of resources:
Evaluation period:
Position type:
Recommendation:
The above named trainee performed the initialed and dated tasks under my supervision. I recommend the following for this trainee's further development:
The trainee has successfully performed all required tasks for the position. The AHJ should consider the individual for certification.
The trainee could not complete certain tasks or needs additional guidance. See comments below.
Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation.
The trainee is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a trainee for this position.
Additional recommendations/comments:
Date:
Evaluator's initials:
Evaluator's relevant qualification:

Planning Section Chief (PSC)

1. Competency: Assume position responsibilities

Description: Successfully assume the role of PSC and initiate position activities at the appropriate time according to the following behaviors.

1a. Behavior: Ensure readiness for assignment

	TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
1.	Obtain, assemble, and prepare information and materials for go-kit prior to receiving an assignment. The kit should contain critical items for the assignment and be easily transportable: • Reference materials: • In electronic, digital, or hard-copy format • Functional guidelines relative to incident type (agency guidance or other functional guidelines) • Authority Having Jurisdiction (AHJ) operations guides, Emergency Response Field Operations Guide (ER-FOG), or other operational guides • Position manuals • Forms: • Agency-specific forms appropriate to the function • Supplies: • Office supplies appropriate to the function • AHJ identification badge and qualification card • Personal Protective Equipment (PPE) and security measures	C, E, F, I, J, T		
2.	Gather information necessary to assess position assignment and determine immediate needs and actions: • Updated contact information and information links • Type of incident • Current resource commitments • Current situation • Expected duration of assignment • PPE requirements and recommended deployment equipment • Incident logistics	E, F, I		
3.	Obtain complete information upon activation: Incident name and number Reporting time and location Transportation arrangements and travel routes Contact procedures during travel (telephone/radio) Expected working conditions PPE and security measures	E, F, I		

Version: September 2017 7 | Page

1b. Behavior: Understand and comply with NIMS concepts and principles

	TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
4	 Understand scope, roles, responsibilities, jurisdiction, and authority of responding agencies. 	E, F, I		

1c. Behavior: Successfully assume the role of PSC and initiate position activities

	TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5.	 Relay, support, and maintain operational rhythm: Prepare a section support plan, gathering information from all appropriate section personnel to determine support needs Complete situation reports for the section related to the current operational phase 	E, F, I		
6.	Initiate and maintain section activity log: Complete activity log and use to support a common operating picture Transfer information to additional documents, positions, and displays	E, F, I		

1d. Behavior: Gather, update, and apply situational information relevant to the assignment

	TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
7.	Receive initial briefing from supervisor—one-on-one or	E, F, I		
	in team meetings:			
	 Incident priorities, goals, and objectives 			
	 Initial instructions concerning section priorities 			
	• Expected time frames for briefings, planning meetings,			
	and team meetings			
	• Any limitations and constraints that affect operations			
	and strategies			
	• Review:			
	o Incident plans			
	 Current national situation 			
	Assigned resources and their status			
	Established and operating facilities			
	o Anticipated incident duration, size, and type			
0	Section responsibilities and expectations	PPI		
8.	Review the Incident Action Plan (IAP), other relevant	E, F, I		
	plans, and Resources Unit records to identify resources assigned:			
	ě .			
	Location and status of assigned resources Description if assigned			
	Resource identifier, if assigned			
	Supervisor name and contact information Logaritan			
	• Location			
	• Assignment			
	 Resource kind, type, and quantity 			

Version: September 2017 8 | Page

Position Task Book: PSC

1e. Behavior: Ensure availability, qualifications, and capabilities of resources to complete assignment

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
9. Identify kind, type, and quantity of resources necessary to achieve objectives:	E, F, I		
 Consider span of control when determining resource requirements and configurations 			
 10. Order necessary resources to achieve section objectives: Request additional personnel, supplies, services, and equipment within the established ordering processes 	E, F, I		
11. Organize planning meeting location and ensure necessary materials are available:	E, F, I		
 Large-scale operational planning worksheet and IAP safety analysis 			
Large-scale schematic map of incident			
 Large-scale charts for fill-in of objectives and operational rhythm/schedule 			
Planning meeting agendaList of incident priorities and objectives			

1f. Behavior: Establish effective relationships with relevant personnel

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
12. Establish and maintain positive interpersonal and	E, F, I		
interagency working relationships:Outgoing incident staff or teams			
Local agencies			
Hosting unit			
Policy group			
• Public			
Supporting agencies			

Version: September 2017 9 | Page

1g. Behavior: Establish or determine organizational structure, reporting procedures, and chain of command of assigned resources

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
 13. Activate section: Establish appropriate section organization and assign staff responsibilities, while maintaining span of control Ensure availability of appropriate resources Conduct supporting activities within operational period Follow protocol for communicating section's daily accomplishments to the Documentation Unit or appropriate personnel Obtain operational rhythm from supervisor and establish daily briefing/debriefing schedule with assigned personnel Follow process for resource requests/releases for operational planning purposes Assign staff or units as appropriate Participate in planning meetings to determine section organization, support tactical assignments, ensure resource support and coordination needs, and identify other considerations for the next operational period 	E, F, I		
 Supervise and adjust section organization and activities based on changes in incident situation and resource status: Maintain common operating picture throughout the section Provide for functional and geographical supervision as necessary Ensure effective use and coordination of all assigned resources Constantly monitor objectives and overall section operations for efficacy and safety 	E, F, I		
 15. Keep supervisor and assigned personnel informed of organizational changes: Staff and unit mobilization/demobilization Any personnel changes 	E, F, I		

Version: September 2017 10 | Page

2. Competency: Lead assigned personnel

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

2a. Behavior: Model leadership values and principles

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
16. Exhibit principles of duty, respect, and integrity:	E, F, I, J		
 Be proficient in the job, both technically and as a 			
leader			
 Make sound and timely decisions 			
 Supervise staff to ensure understanding and 			
accomplishment of duties and tasks			
 Train and mentor assigned subordinates 			
 Keep assigned personnel informed 			
 Seek and accept responsibility for actions 			

2b. Behavior: Ensure the health, safety, welfare, and accountability of assigned personnel

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
 17. Comply with relevant health and safety requirements: Direct operations based on health and safety considerations and guidelines Ensure that assigned personnel follow safety guidelines appropriately Spot-check operations to ensure compliance with safety considerations 	E, F, I		
 18. Evaluate mental and physical fatigue of assigned personnel and make resources available to support: Appropriate work/rest ratio Crisis counseling 	E, F, I		

2c. Behavior: Establish work assignments and performance expectations, monitor performance, and provide feedback

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
19. Prioritize work within the section, while taking into account immediate support for incident operations.	E, F, I		

Version: September 2017 11 | Page

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
 20. Periodically evaluate personnel status and operational needs to determine whether personnel assignments are appropriate: Determine kind and number of personnel necessary for section operations Provide single personnel or teams depending on the needs of the Branch Directors, Division/Group Supervisors, and Unit Leaders Provide for functional and geographical supervision as necessary 	E, F, I		
 21. Evaluate the performance of assigned personnel and ensure that staff: Implement assigned portions of the IAP Order and assign resources within the section Report on the progress or control of section operations Report on status of resources within the section 	E, F, I, T		

2d. Behavior: Coordinate interdependent activities

	TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
22.	Ensure effective use and coordination of all assigned	E, F, I		
	resources:			
	 Conduct briefing and debriefing with assigned 			
	personnel and supervisor between operational periods			
23.	Coordinate with assigned personnel and give supervisor a	E, F, I		
	list of excess resources:			
	• List may include:			
	 Kind and type 			
	 Quantity 			
	o Time/date of available release			
	 Review the list daily for accuracy, ensuring all 			
	branches/divisions/groups and units/staff demobilize			
	in a timely and complete manner			
24.	Coordinate with other appropriate personnel:	E, F, I		
	• Receive and transmit current and accurate information			
	• Communicate changes to the IAP or relevant plans			
	 Inform appropriate team members of significant changes in operations 			
	• Ensure supervisor is aware of all changes in status of			
	resources assigned to the operation and keep status current			
	• Provide supervisor with operational status for incident			
	status summary and situation reports			
25.	Coordinate with incoming position replacement:	E, F, I		
	Brief and debrief between operational periods			
	 Coordinate the preparation of the next operational period's IAP or relevant plans 			

Version: September 2017 12 | Page

3. Competency: Communicate effectively

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a potentially rapidly changing environment.

3a. Behavior: Ensure the exchange of relevant information during briefings and debriefings

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
26. Effectively communicate options, considerations, and recommendations during briefings.	E, F, I		
 27. Attend daily section briefings: Receive priorities, goals, and objectives Communicate branch accomplishments, concerns, or conflicts Develop branch plan based on priorities, goals, and objectives 	E, F, I		
 28. Schedule and conduct daily briefings to assigned personnel: Inform identified meeting attendees of time, location, and information they should provide for the meeting Define objectives, agenda, and time expectations Post meeting agenda at appropriate locations Make arrangements for documentation and recording of applicable information Resolve concerns and conflicts 	E, F, I		
 29. Prepare for and participate in briefings with other sections, branches, divisions/groups, units, and incident staff: Share and evaluate information with section members Identify safety hazards and mitigation strategies with the Safety Officer Maintain quality updates for Public Information Officer (PIO) 	E, F, I		
 30. Facilitate planning meetings and share pertinent information: Expected duration Changes in objectives or strategies Approval of IAP Additional responsibilities Changes in jurisdictional involvement 31. Schedule and facilitate operational period briefings. 	E, F, I		
 32. Inform identified attendees of planning meeting time, location, and information expected of them: Define meeting objectives, agenda, and time expectations Post agenda at appropriate locations 	E, F, I		

Version: September 2017 13 | Page

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
33. Ensure presenters are aware of and adhere to their roles and responsibilities during meetings:	E, F, I		
Operational briefing			
Tactics meeting			
Planning meeting			
Strategy meeting			
 Command and General Staff meetings 			

3b. Behavior: Ensure documentation is complete and disposition is appropriate

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
34. Ensure incident documentation and administrative	E, F, I		
requirements are complete, according to the supervisor's			
direction:			
Submit incident narrative to supervisor			
 Complete and submit activity log to Documentation 			
Unit or appropriate personnel for each operational			
period			
 Ensure all personnel and equipment time records are 			
complete and submitted at the end of each operational			
period			
35. Coordinate submission of incident status summary:	E, F, I		
Accurate and complete			
 Priorities and special considerations 			
 Within established time frames 			
Incident Commander's (IC) signature			

3c. Behavior: Communicate incident priorities and operations

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
36. Communicate priorities, objectives, and any changes throughout the section:	E, F, I		
 Maintain common operating picture throughout the section 			
 37. Monitor section support status and develop alternate strategies to meet incident objectives: Advise assigned staff of significant changes that may affect them 	E, F, I		
 38. Report unexpected occurrences (such as injuries, illnesses, accidents, political contacts, and property loss or damage): Ensure standard information contains nature of event, location, magnitude, personnel involved, initial action taken, and appropriate subsequent action Ensure the protection of Personally Identifiable Information (PII) while reporting 	E, F, I		

Version: September 2017 14 | Page

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
39. Update supervisor on current accomplishments or problems and complete incident forms as necessary.	E, F, I		

3d. Behavior: Develop and implement plans

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
 40. Develop and implement a transition plan for transfer of command: Contains accurate assessment of the situation Identify incident needs 	E, F, I		
 Identify incident needs Identify release priorities Include date and time of transition and transfer of command 			
 Complete transition of functional duties in a timely, smooth, and efficient manner Facilitate transfer of command meeting briefings in the 			
planning process 41. Ensure planning staff completes or supports completion of other relevant plans within required time frames: • Demobilization plan • Transfer of command plan	E, F, I		
 42. Consider the need for contingency plans: Severe weather planning Incident-within-an-incident basic plan Evacuation plan 	C, E, F, I, J		

Version: September 2017 15 | Page

4. Competency: Ensure completion of assigned actions to meet identified objectives

Description: Identify, analyze, and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established time frame.

4a. Behavior: Execute assigned tasks, assess progress, and make necessary adjustments

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
43. Ensure that assigned tasks and expectations for the operational period are reasonable and accurate.	E, F, I		
44. Manage information postings and respond to requests for assistance.	or E, F, I		
45. Hold personnel accountable for the execution of assigne tasks.	ed E, F, I		
 46. Make appropriate decisions based on analyzed and validated information: Make adjustments in response to new information, changing conditions, or unexpected obstacles 	E, F, I		
 47. Ensure that the work completed is consistent with direction, policy, and incident objectives: Supervisor's direction IAP goals and objectives Other planning goals and objectives 	E, F, I		

4b. Behavior: Develop and implement IAP

	TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
with • () • A • F • () • S • () • I • () a • F	sure staff complete and compile elements of the IAP hin time frames: Obtain elements from other appropriate sections Assemble the elements into an IAP Ensure the IAP links objectives with strategies and actics Obtain information from all Command and General Staff on IAP Obtain the IC's approval and signature on IAP dentify the number of IAP copies necessary Check entire IAP for content, completeness, and accuracy Ensure distribution of IAP copies	E, F, I		
prej	ecute the forecasting for future operational periods and pare reports.	E, F, I		
it to	ad the completion of a situation report and disseminate o staff according to current guidelines or procedures.	E, F, I		
	nd the creation of an incident support map with all els, facilities, and other incident-related markers.	E, F, I		

Version: September 2017 16 | Page

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
52. Establish and maintain incident planning cycle:	E, F, I		
 Publish and post planning cycle/operational rhythm at appropriate locations Distribute cycle to IC, Command and General Staff, and other appropriate personnel Facilitate meeting and briefings during the planning cycle 			
53. Revise planning cycle when appropriate:	C, E, F,		
 Meeting time and location 	I		
Operational periods			

4c. Behavior: Manage all unit functions appropriately

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
 54. Establish priorities among units within the Planning Section: Describe the process for prioritizing work within the Planning Section Demonstrate the prioritization process 	E, F, I		
 55. Manage information postings and respond in a timely fashion to requests for assistance (RFA) or requests for information (RFI): Describe the execution of RFA/RFI and how it comes to the Planning Section 	E, F, I		
 56. Identify functions: Operational Coordination Support: Demonstrate the ability to conduct a support system assessment and provide corrective action if problems are found 	C, E, F, I		
57. Demonstrate duties associated with each unit in the Planning Section.	E, F, I		

4d. Behavior: Transfer position duties while ensuring continuity of authority and knowledge and while taking into account the increasing or decreasing incident complexity

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
 58. Coordinate an efficient transfer of position duties when mobilizing/demobilizing resources: Inform assigned personnel and supervisor Communicate with incoming personnel concerning when and where transition of positions will occur Conduct transition effectively Document follow-up action and submit to agency representative 	E, F, I		

Version: September 2017 17 | Page

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
59. Complete all necessary reports and narratives to common standards prior to turnover:	E, F, I		
Shift change			
End of operational period			
Reassignment			
Demobilization			

4e. Behavior: Plan for demobilization and ensure staff follow procedures

TASK	CODE	EVALUATION RECORD#	EVALUATOR INITIALS AND DATE
 60. Assist in development, approval, and implementation of incident demobilization plan: Coordinate with supervisor during development and implementation Coordinate with appropriate partners regarding demobilization procedures Coordinate section needs and responsibilities Provide information to supervisor to assist with decisions on release priorities 	E, F, I		
 61. Coordinate with relevant entities to develop and implement the incident demobilization plan: Consider demobilization early in the incident Coordinate with Demobilization Unit, and Command and General Staff Coordinate with local agencies concerning functional demobilization procedures Brief staff on demobilization responsibilities Ensure section demobilizes in a timely and complete manner Emphasize safety and accountability during demobilization phase 	E, F, I		
 62. Complete process for demobilizing section responsibilities: Reinforce emphasis on safety and accountability during this phase of the operations Brief section on demobilization responsibilities Ensure all section units demobilize in a timely and complete manner Brief replacement 	E, F, I		
63. Participate in organization closeout/After Action Review (AAR).	E, F, I		
64. Facilitate host agency administrator closeout/AAR.	E, F, I		

Version: September 2017 18 | Page