
Unit 6:

Operational Period Planning

Cycle



FEMA

Visual 6.1

Unit Terminal Objective

Describe the purpose, timing, and structure of each of the meetings, briefings, and documents in the Operational Period Planning Cycle.



FEMA

Visual 6.2

Unit Enabling Objectives

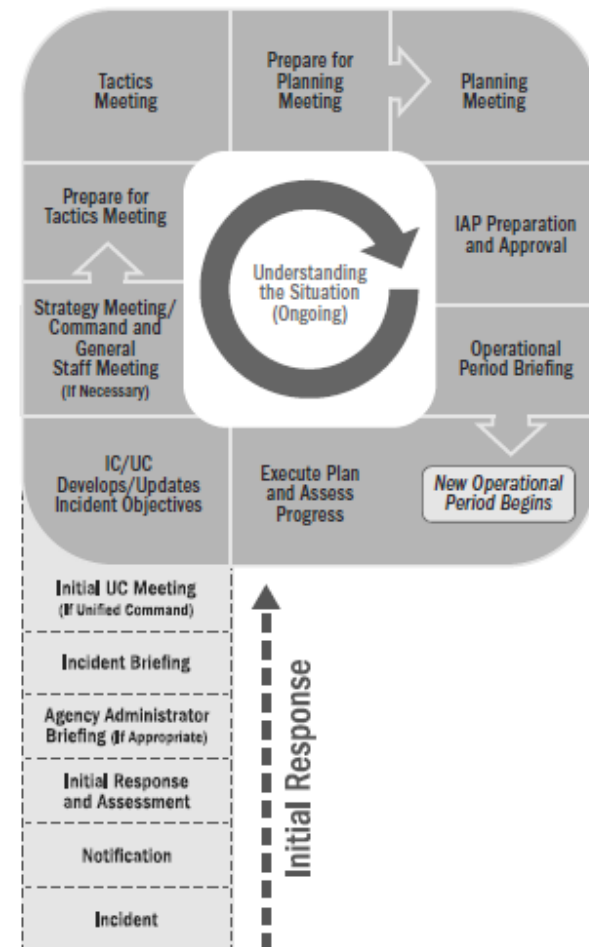
- Describe PSC's role in Planning Meeting.
- Describe purpose of Incident Action Plan (IAP).
- Describe components of IAP and who is responsible for preparing it.
- Describe PSC's role in IAP development.
- Identify who approves IAP.
- Describe PSC's role in Operational Briefing.
- Identify other Incident Management Team (IMT) meetings and briefings that PSC may attend.



FEMA

Unit Overview

- **Operational Period Planning Cycle**
- **Tactics Meeting**
- **Planning Meeting**
- **Incident Action Plan**
- **Operational Briefing**
- **Incident Status Report**
- **Other Meetings**



FEMA

Operational Period Planning Cycle

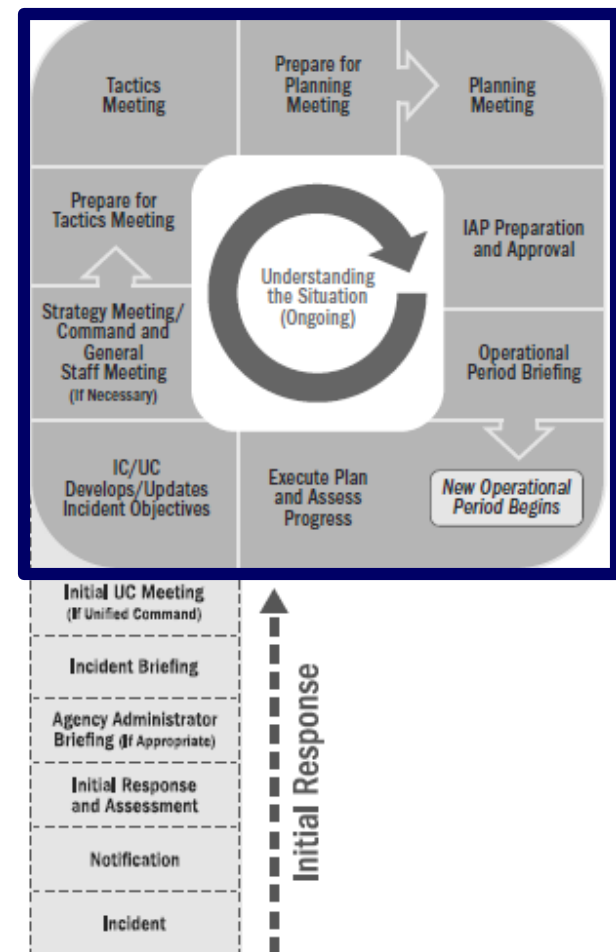


FEMA

Visual 6.5

Operational Period

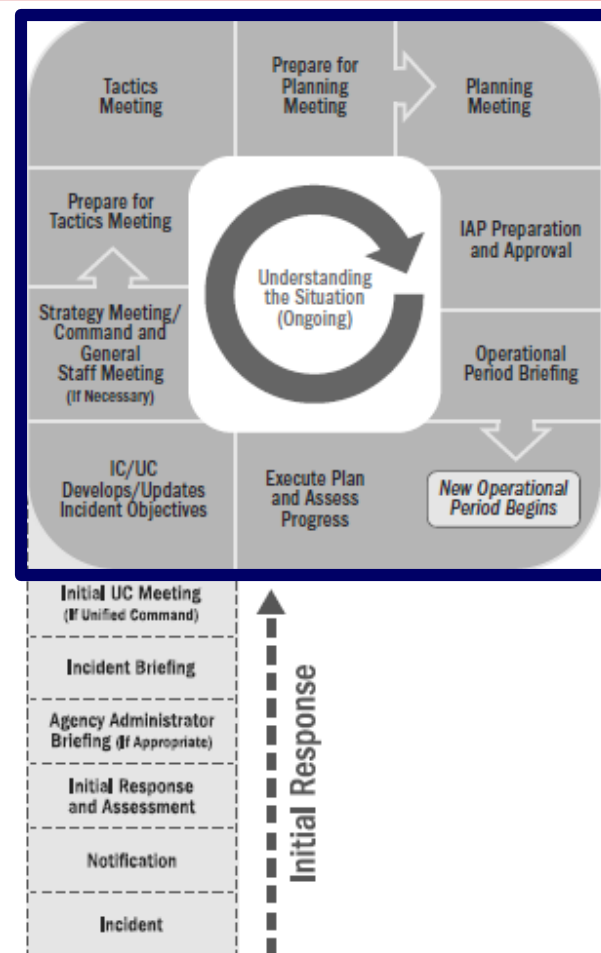
- The designated time period in which tactical objectives are to be accomplished and reevaluated.
- Common lengths are:
 - 12 or 24 hours for Type 1, 2, 3
 - 2-4 hours for HazMat
 - Multiple days for relatively stable situations
- Establish operational planning period with Incident Commander(s) and Operations Section Chief(s).



FEMA

The Operational Period Planning Cycle

- The Operational Period Planning Cycle establishes timeframes for completion of the major milestones:
- Strategy Meeting
- Tactics Meeting
- Planning Meeting
- Completion of the Incident Action Plan
- Operational Briefings



FEMA

Visual 6.7

Meeting Facilitation

- **The Planning Section Chief is responsible for facilitating meetings and briefings:**
- **Clearly define objectives.**
- **Follow predetermined agenda.**
- **Predetermine audience.**
- **Establish meeting locations.**
- **Provide specific deliverables.**
- **Ensure meetings are as productive and efficient as possible.**



FEMA

Tactics Meeting (1 of 4)



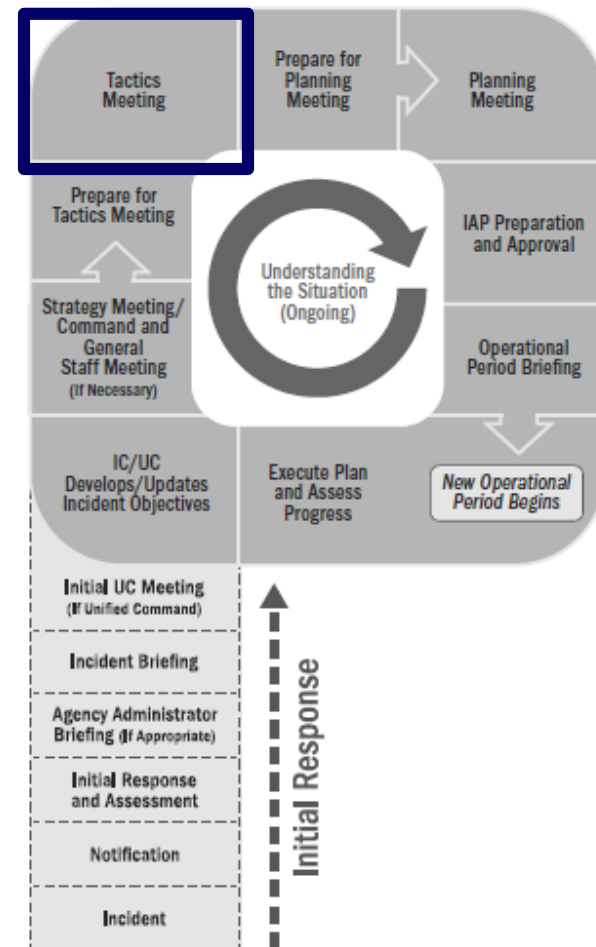
FEMA

Visual 6.9

Tactics Meeting (2 of 4)

Purpose: Review the tactics developed by the Operations Section Chief.

- Determine how to accomplish selected strategy.
- Assign resources to implement the tactics.
- Identify methods for monitoring tactics and resources.



FEMA

Visual 6.10

Tactics Meeting (3 of 4)

- The Tactics Meeting is typically brief.
- Occurs 1 - 4 hours prior to the Planning Meeting.
- Usually informal.



FEMA

Tactics Meeting (4 of 4)

- OSC, Safety Officer, PSC, LSC, and RESL typically attend the Tactics Meeting.
- Others attend, strictly as needed.
- OSC leads the Tactics Meeting.
- PSC may facilitate to help keep meeting on track.



FEMA

Visual 6.12

ICS Form 215

There are three methods IMTs commonly use when preparing for the Tactics Meeting.

- The ICS Form 215 is drafted prior to the meeting.
- The ICS Form 215 is drafted during the meeting.
- The ICS Form 215 is drafted after the meeting.

OPERATIONAL PLANNING WORKSHEET (ICS 215)															
1. Incident Name:						2. Operational Period: Date From: _____ Date To: _____ Time From: _____ Time To: _____									
3. Branch	4. Division, Group, or Other	5. Work Assignment & Special Instructions	6. Resources									7. Overhead Position(s)	8. Special Equipment & Supplies	9. Reporting Location	10. Requested Arrival Time
			Rep: _____												
			Have _____												
			Need _____												
			Rep: _____												
			Have _____												
			Need _____												
			Rep: _____												
			Have _____												
			Need _____												
			Rep: _____												
			Have _____												
			Need _____												
			Rep: _____												
			Have _____												
			Need _____												
		11. Total Resources Required											14. Prepared by: _____		
		12. Total Resources Have on Hand											Name: _____		
		13. Total Resources Need To Order											Position/Title: _____		
													Signature: _____		
													Date/Time: _____		

ICS 215



FEMA

ICS Form 215 (Cont.)

Completing the ICS Form 215 prior to the Planning Meeting will:

- **Prevent unnecessary discussion of tactics**
- **Maximize effectiveness**
- **Avoid excessive external influences**
 - **Closed door session with a “gatekeeper”**
- **Promote a perception of organization**



FEMA

Prepare for Planning Meeting



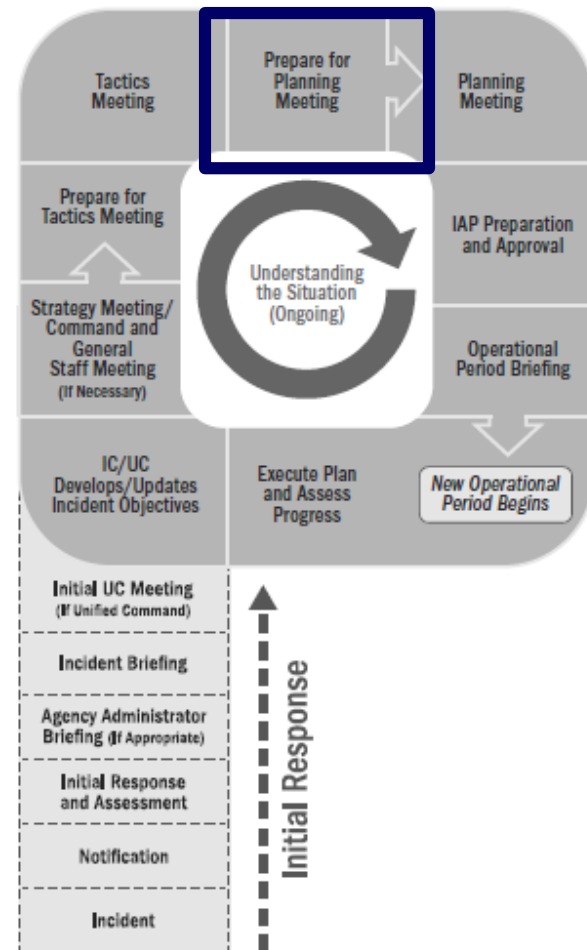
FEMA

Visual 6.15

Prepare for Planning Meeting (cont)

Following the Tactics Meeting, the PSC prepares for Planning Meeting:

- Analyze ICS Form 215.
- Obtain ICS Form 215A.
- Assess current operations.
- Gather information.



FEMA

Planning Section Chief Preparation

- **Determine participants with the Incident Commander.**
- **Ensure that planning maps, forms, and resource and situation status are available and up to date.**
- **Establish and post location.**
- **Inform attendees of time and location and what is expected from them.**
- **Assign someone to take notes.**
- **Make sure there are no surprises.**



FEMA

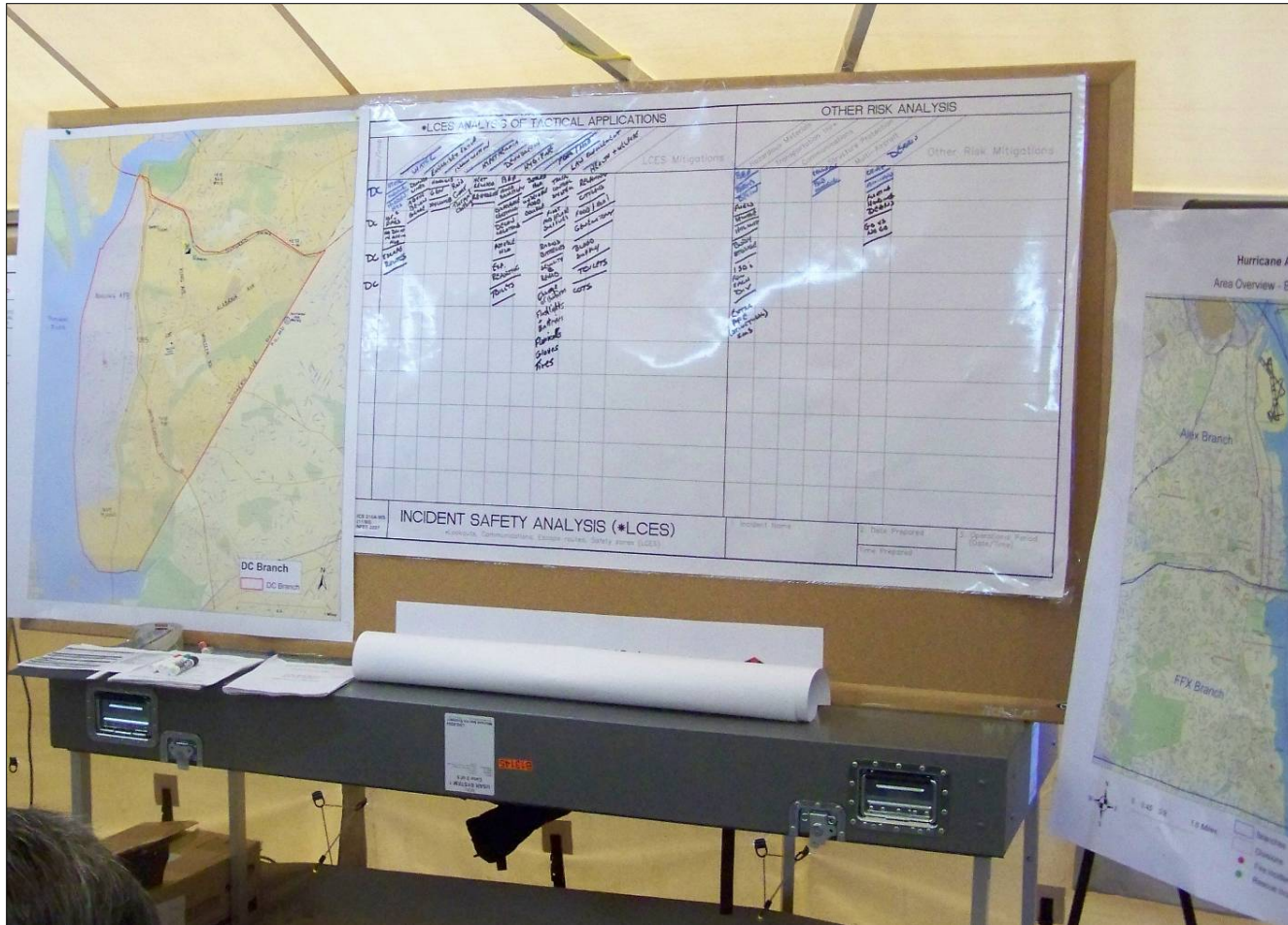
Planning Section Preparation

- To prepare for the Planning Meeting:
- The Situation Unit Leader provides displays or information.
- The Resources Unit Leader fills out large ICS Form 215 and identifies resource availability.
- Technical Specialists provide analysis in area of expertise.



FEMA

Displays for the Planning Meeting



Planning Meeting



FEMA

Visual 6.20

Planning Meeting

Purpose: Opportunity to review and validate the Operational Plan as proposed by the Operations Section Chief.

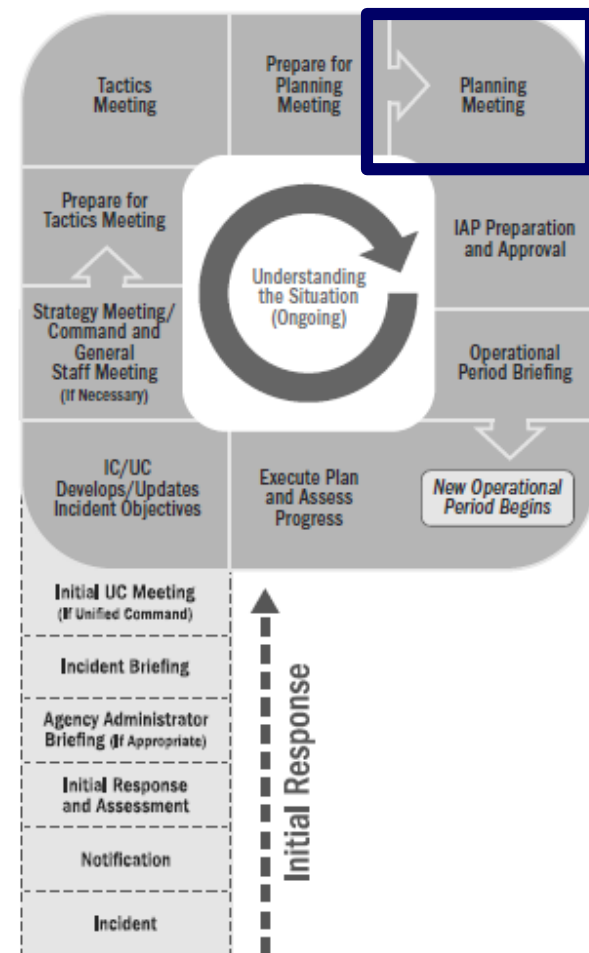


FEMA

Visual 6.21

Conducting the Planning Meeting

- Planning Section Chief is responsible for facilitating the meeting and ensuring the flow of information is brief and to the point.
- Groundwork should be completed prior to the meeting.



FEMA

Facilitating the Planning Meeting

Tips for Facilitation

Follow the meeting agenda.

Stay focused and keep as brief as possible.

Silence all cell phones and radios.

Always start on time.

Always give ground rules; consider posting.

Always display Command presence.

Keep to 30 minutes or less.

Touch base with all concerned.

Stay on track and arrange post-meeting discussions, if needed.

Participants must be prepared and able to commit their agencies.



FEMA

Visual 6.23

Time Savers

- Have involved people up front – predesignate seats.
- Discuss their roles before the meeting.
- Use an agenda.
- No dead air time.



FEMA

Agenda Discussion

1. Briefing on situation and resource status.	Planning Section Chief
2. Set/review incident objectives.	Incident Commander
3. Identify assignments.	Operations Section Chief
4. Specify tactics.	Operations Section Chief
5. Specify safety mitigation measures.	Safety Officer
6. Specify resources needed.	Operations Section Chief, Planning Section Chief
7. Specify Operations facilities and reporting locations.	Operations Section Chief, Planning Section Chief, Logistics Section Chief
8. Develop resource and personnel order.	Logistics Section Chief
9. Consider Communications, medical, and traffic plan requirements.	Logistics Section Chief, Planning Section Chief
10. Finalize, approve, and implement Incident Action Plan.	Planning Section Chief, Incident Commander, Operations Section Chief

Handout 6-1: Planning Meeting Agenda



FEMA

Visual 6.25



Activity 6.1: Planning Meeting

Allotted Time: 2 hours 30 minutes



FEMA

Visual 6.26

Incident Action Plan (IAP) (1 of 3)



FEMA

Visual 6.27

IAP (2 of 3)

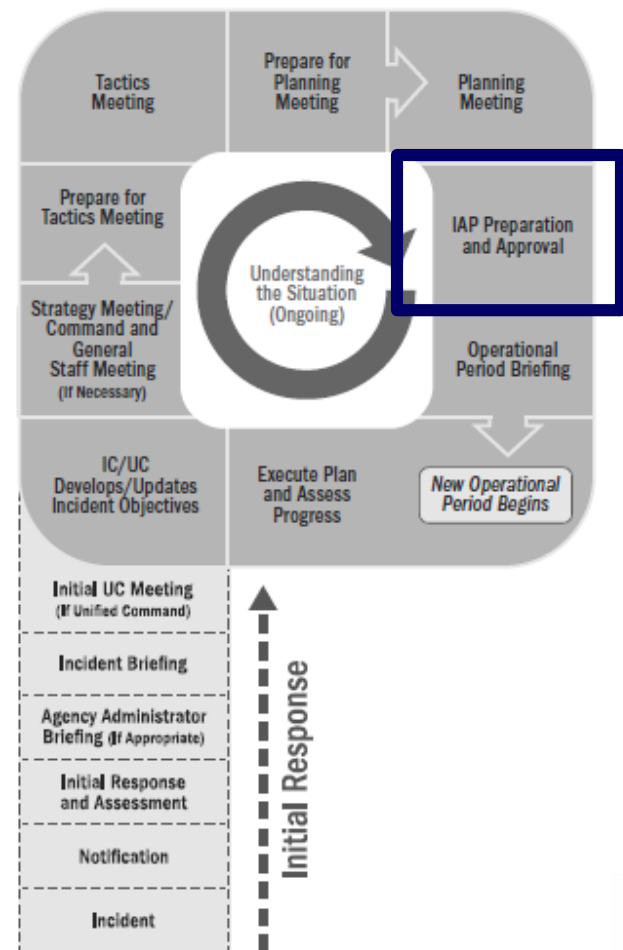
- **IAP documents the actions developed during Tactics Meeting and approved at the Planning Meeting.**
- **The plan specifies control objectives, tactics, resources, organization, Communications Plan, Medical Plan, and other appropriate information.**



FEMA

IAP (3 of 3)

- Incidents will vary in size and complexity, so will the IAP.
- Planning process exists to produce an IAP.
- IAPs must be accurate and complete enough to be the guide for Operations.



FEMA

Purposes of the IAP

The IAP:

- Addresses the safety of personnel
- Ensures the effectiveness of response operations
- Provides operational direction for incident personnel (who, what, when, where, and how)

What are some other intended purposes?

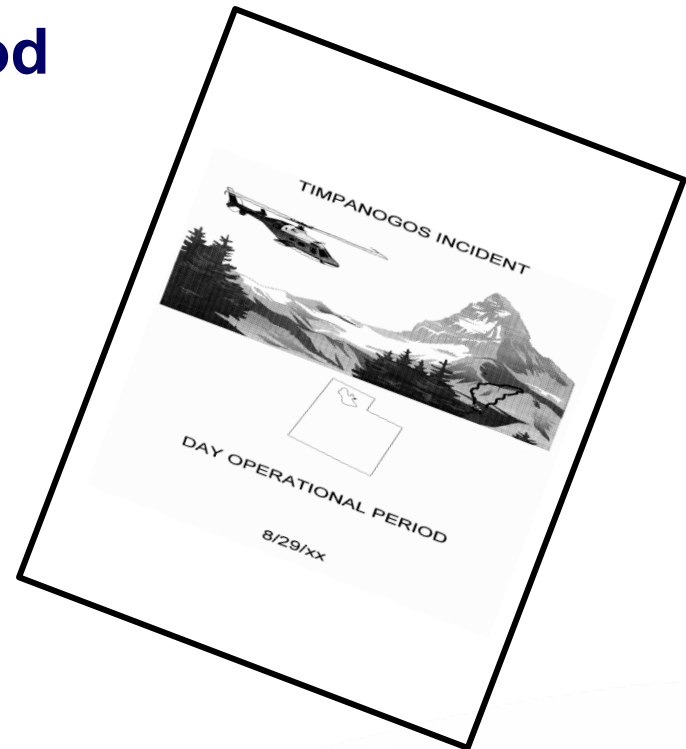


FEMA

When is an IAP Required?

Incidents generally requiring written IAPs:

- **Involve large number of resources**
- **Exceed one operational period**
- **Requested by Incident Commander**
- **Required by agency**



FEMA

IAP Components

- **ICS Form 202 Incident Objectives**
- **ICS Form 203 Organization Assignment List**
- **ICS Form 204 Assignment List**
- **ICS Form 205 Incident Radio Communications Plan**
- **ICS Form 206 Medical Plan**
- **ICS Form 208 Safety Message/Plan**
- **Traffic Plan (internal and external to the incident)**
- **Incident Map (topo section or sketch)**

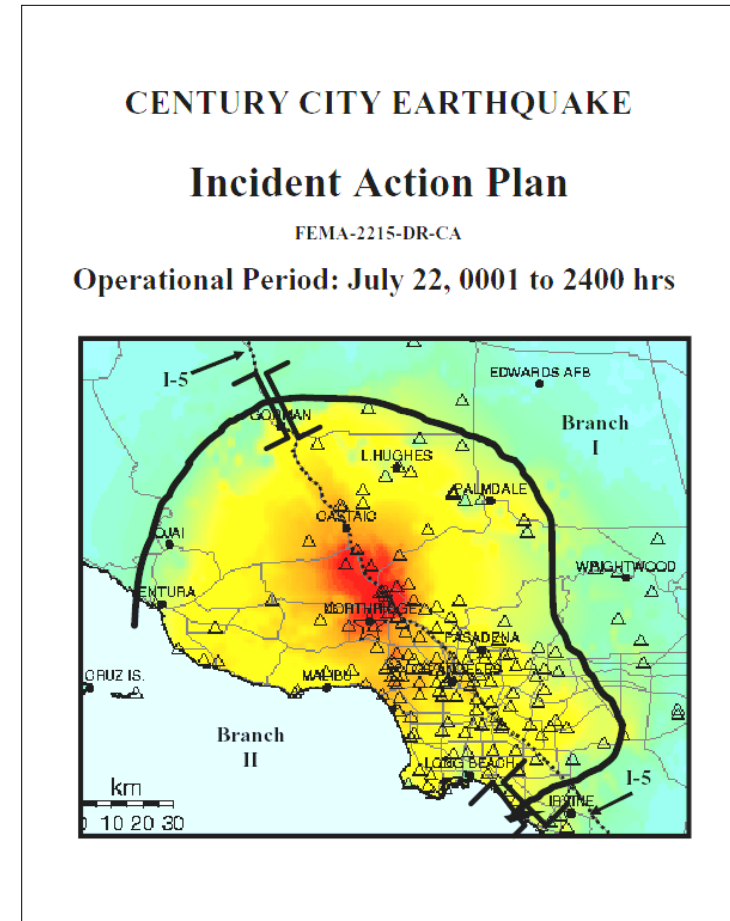
Handout 6-2: Sample IAP



FEMA

Cover Page

What goes on the
cover page?



FEMA

Visual 6.33

ICS Form 202

Incident Objectives Form

- Describes basic incident strategy, control objectives, and provides weather information and safety considerations for use during next operational period.
- Prepared by PSC.
- Approved by IC.

INCIDENT OBJECTIVES (ICS 202)													
1. Incident Name:	2. Operational Period: Date From: _____ Date To: _____ Time From: _____ Time To: _____												
3. Objective(s): 													
4. Operational Period Command Emphasis: 													
General Situational Awareness 													
6. Site Safety Plan Required? Yes ☐ No ☐ Approved Site Safety Plan(s) Located at: _____													
8. Incident Action Plan (the items checked below are included in this Incident Action Plan): <table border="0"><tr><td>☐ ICS 203</td><td>☐ ICS 207</td><td rowspan="5">Other Attachments: ☐ _____ ☐ _____ ☐ _____ ☐ _____</td></tr><tr><td>☐ ICS 204</td><td>☐ ICS 208</td></tr><tr><td>☐ ICS 205</td><td>☐ Map/Chart</td></tr><tr><td>☐ ICS 205A</td><td>☐ Weather Forecast/Tides/Currents</td></tr><tr><td>☐ ICS 206</td><td></td></tr></table>			☐ ICS 203	☐ ICS 207	Other Attachments: ☐ _____ ☐ _____ ☐ _____ ☐ _____	☐ ICS 204	☐ ICS 208	☐ ICS 205	☐ Map/Chart	☐ ICS 205A	☐ Weather Forecast/Tides/Currents	☐ ICS 206	
☐ ICS 203	☐ ICS 207	Other Attachments: ☐ _____ ☐ _____ ☐ _____ ☐ _____											
☐ ICS 204	☐ ICS 208												
☐ ICS 205	☐ Map/Chart												
☐ ICS 205A	☐ Weather Forecast/Tides/Currents												
☐ ICS 206													
7. Prepared by: Name: _____ Position/Title: _____ Signature: _____													
8. Approved by Incident Commander: Name: _____ Signature: _____													
ICS 202	IAP Page _____	Date/Time: _____											



FEMA

ICS Form 203

Organization Assignment List

- Defines key Incident Command System positions and names of personnel currently activated on the incident by operational period.
- Prepared and maintained by the RESL under supervision of PSC.

ORGANIZATION ASSIGNMENT LIST (ICS 203)			
1. Incident Name:		2. Operational Period: Date From: _____ Date To: _____ Time From: _____ Time To: _____	
3. Incident Commander(s) and Command Staff:		7. Operations Section:	
IC/UCs		Chief	
		Deputy	
Deputy		Staging Area	
Safety Officer		Branch	
Public Info Officer		Branch Director	
Liaison Officer		Deputy	
4. Agency/Organization Representatives:		Division/Group	
Agency/Organization	Name	Division/Group	
		Division/Group	
		Division/Group	
		Division/Group	
		Branch	
		Branch Director	
		Deputy	
5. Planning Section:		Division/Group	
Chief		Division/Group	
Deputy		Division/Group	
Resources Unit		Division/Group	
Situation Unit		Division/Group	
Documentation Unit		Branch	
Demobilization Unit		Branch Director	
Technical Specialists		Deputy	
		Division/Group	
		Division/Group	
		Division/Group	
6. Logistics Section:		Division/Group	
Chief		Division/Group	
Deputy		Air Operations Branch	
Support Branch		Air Ops Branch Dir.	
Director			
Supply Unit			
Facilities Unit		8. Finance/Administration Section:	
Ground Support Unit		Chief	
Service Branch		Deputy	
Director		Time Unit	
Communications Unit		Procurement Unit	
Medical Unit		Comp/Claims Unit	
Food Unit		Cost Unit	
9. Prepared by: Name: _____		Position/Title: _____ Signature: _____	
ICS 203		IAP Page _____ Date/Time: _____	



FEMA

ICS Form 204

Assignment List

- Identifies supervisors and contacts of given Division/Group for one operational period
- Prepared by the RESL under the guidance of the OSC.

ASSIGNMENT LIST (ICS 204)				
1. Incident Name:		2. Operational Period: Date From: _____ Date To: _____ Time From: _____ Time To: _____		3. Branch: Division: Group: Staging Area:
4. Operations Personnel: Name _____ Contact Number(s) _____ Operations Section Chief: _____ Branch Director: _____ Division/Group Supervisor: _____				
5. Resources Assigned:		Not Persons	Contact (e.g., phone, pager, radio frequency, etc.)	Reporting Location, Special Equipment and Supplies, Remarks, Notes, Information
Resource Identifier	Leader			
6. Work Assignments:				
7. Special Instructions:				
8. Communications (radio and/or phone contact numbers needed for this assignment): Name/Function _____ Primary Contact: Indicate call, pager, or radio frequency/system/channel _____ _____ _____ _____ _____				
9. Prepared by: Name: _____ Position/Title: _____ Signature: _____ ICS 204 IAP Page _____ Date/Time: _____				



FEMA

Incident Radio Communications Plan

- [illegible]



ICS Form 206

Medical Plan

- Provides information on incident medical aid stations, transportation services, hospitals, and medical emergency procedures.
- Prepared by the Medical Unit Leader and reviewed by the Safety Officer.

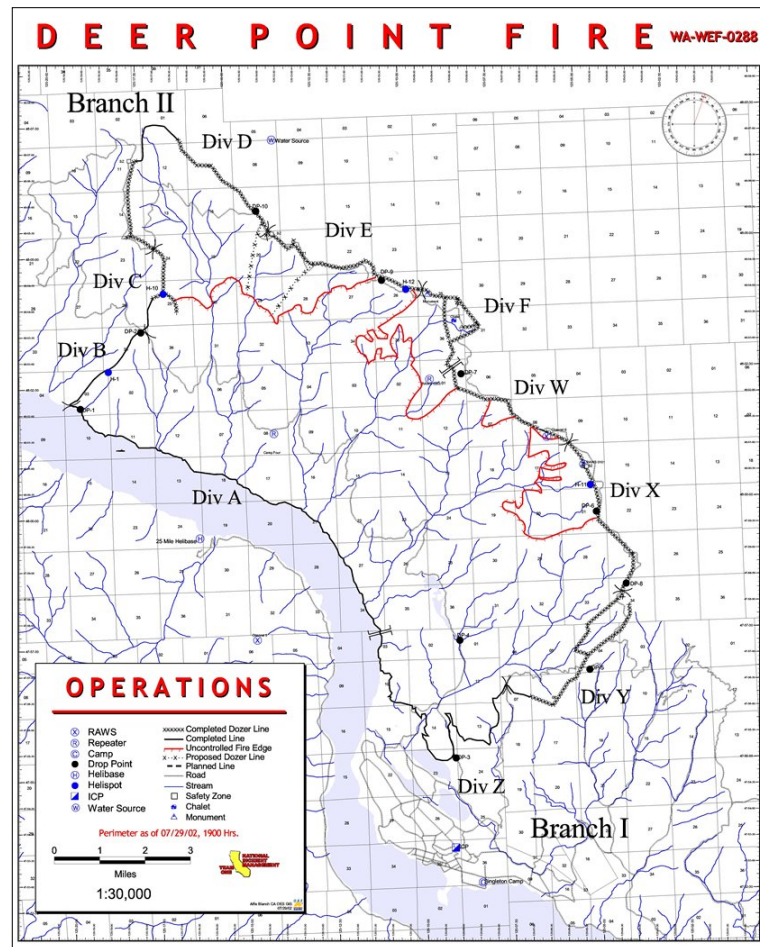
MEDICAL PLAN (ICS 206)									
1. Incident Name:			2. Operational Period: Date From: _____ Time From: _____				Date To: _____ Time To: _____		
3. Medical Aid Stations:									
Name	Location	Contact Numbers/Frequency	Paramedics on Site?						
			☐ Yes ☐ No						
			☐ Yes ☐ No						
			☐ Yes ☐ No						
			☐ Yes ☐ No						
			☐ Yes ☐ No						
4. Transportation (Indicate air or ground):									
Ambulance Service	Location	Contact Numbers/Frequency	Level of Service						
			☐ ALS ☐ BLS						
			☐ ALS ☐ BLS						
			☐ ALS ☐ BLS						
			☐ ALS ☐ BLS						
5. Hospitals:									
Hospital Name	Address, Latitude & Longitude If Helipad	Contact Numbers/Frequency	Travel Time		Trauma Center	Burn Center	Helipad		
			Air	Ground	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No		
					☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No		
					☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No		
					☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No		
					☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No		
6. Special Medical Emergency Procedures:									
☐ Check box if aviation assets are utilized for rescue. If assets are used, coordinate with Air Operations.									
7. Prepared by (Medical Unit Leader): Name: _____ Signature: _____									
8. Approved by (Safety Officer): Name: _____ Signature: _____									
ICS 206		IAP Page _____		Date/Time: _____					



FEMA

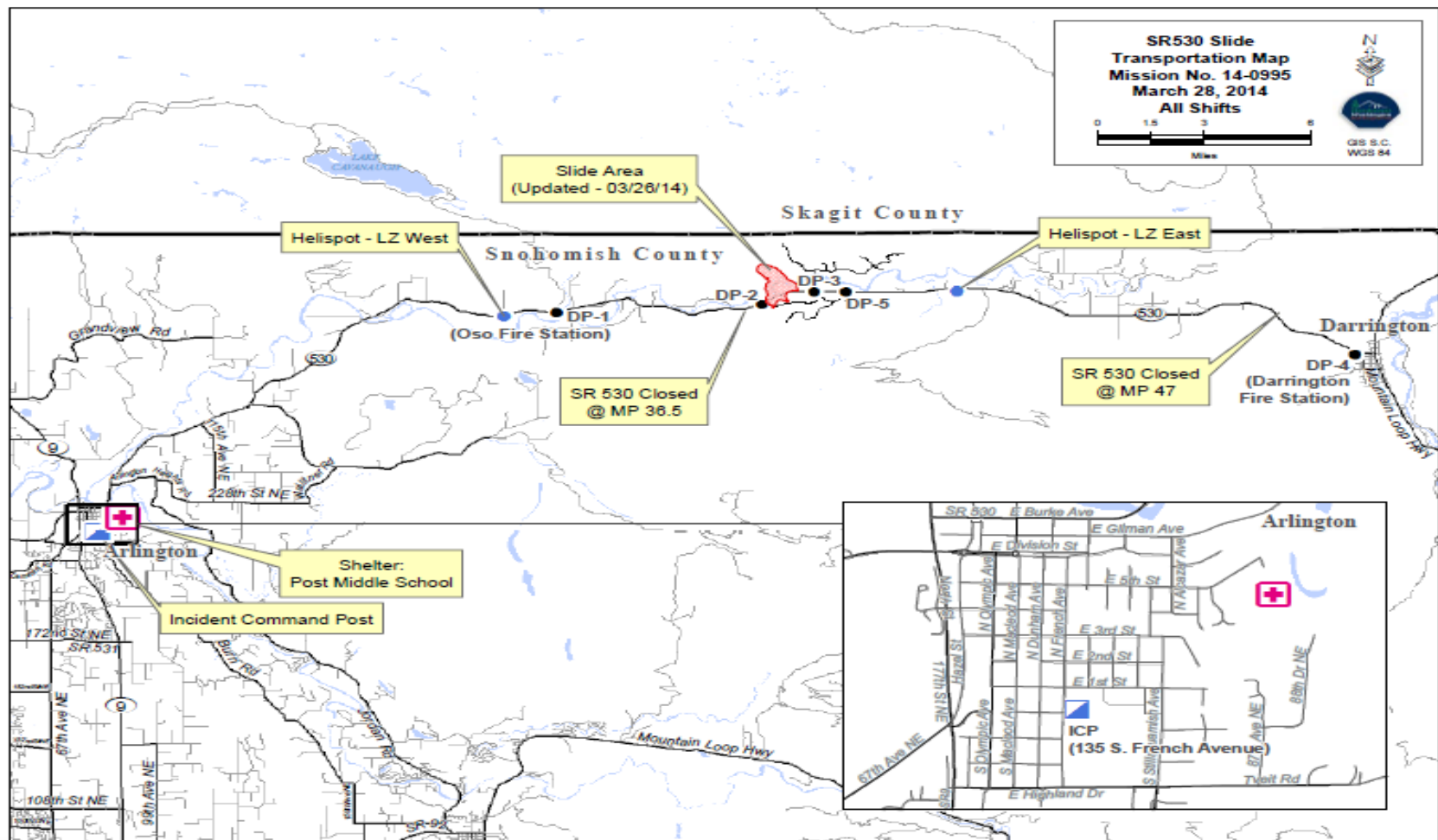
Visual 6.38

Incident Map



FEMA

External Traffic Plan Map



FEMA

Additional Components of the IAP

- **Predictions / assessments / analysis**
- **Weather forecast**
- **ICS Form 220 Air Operations Summary Worksheet**
- **Human Resource message**
- **ICS Form 214 Activity Log**
- **Other relevant documents**



FEMA

Finalize, Produce, Distribute

- Identify WHO is responsible for each component.
- Identify and communicate WHEN they are due.
- Identify WHO will receive completed components.
- Complete final review of the completed IAP.
 - Use the checklist.
 - Determine number of copies to produce.
 - Prioritize distribution based on copying capacity.
 - Consider electronic distribution via QR codes.

Handout 6-3: IAP Checklist



FEMA



Activity 6.2: IAP Preparation

Allotted Time: 1 hour 30 minutes



FEMA

Visual 6.43

Early Distribution of IAP

Distribute IAP as soon as it is produced, if possible, to allow preparation time to the following:

- **Ground Support Unit Leader**
- **Food Unit Leader**
- **Supply Unit Leader**
- **Air Operation**
- **Agency Dispatch**
- **Medical Unit**
- **Communications Unit**



FEMA

Distribute IAP for Operational Briefing

- Approach varies with situation and number of personnel and copies.
- Prepackage by function:
 - Operations/Divisions
 - C&G Staff
- Limited IAP numbers will require controlled distribution.
- Keep original copy & corrected copy for documentation.



FEMA

Prepare for Operational Briefing (1 of 3)



FEMA

Visual 6.46

Prepare for Operational Briefing (2 of 3)

- **Select Briefing Location**
 - Large enough.
 - Quiet.
 - Display area.
 - Audio system.
- **Select Briefing Time**
 - Prior to or at start of operational period.
 - Plan for 30 minutes.
 - Allow for travel time.



FEMA

Prepare for Operational Briefing (3 of 3)

- Ensure units are preparing their displays.
- Time and location.
- Who attends.
- IAP distribution.
- Use a briefing agenda.
- IAP corrected copy.



**Handout 6-4: Sample
Operational Briefing Agenda**



FEMA

Operational Period Briefing (1 of 3)

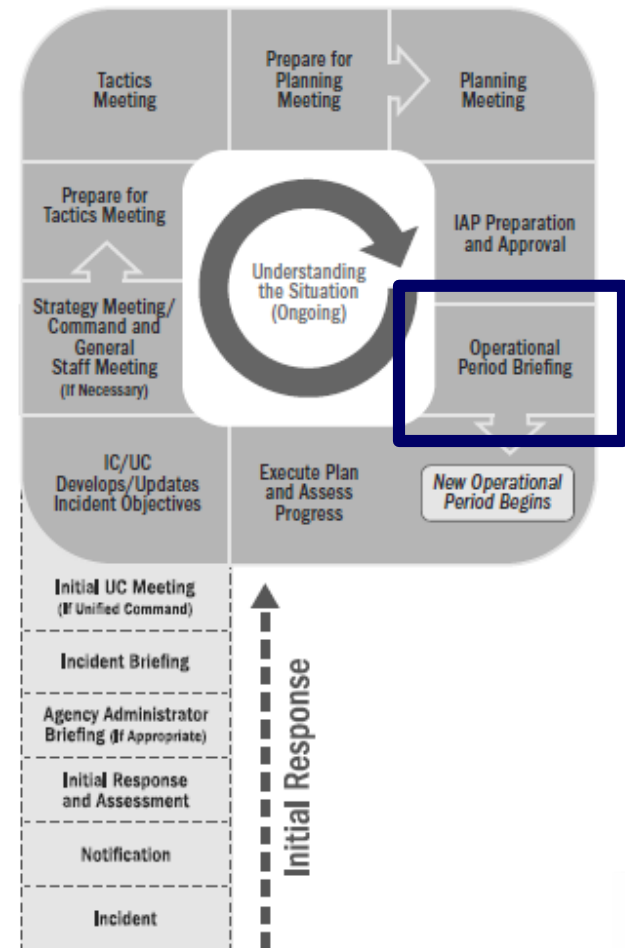


FEMA

Visual 6.49

Operational Period Briefing (2 of 3)

- Present the IAP to supervisors of tactical resources.
- Briefed on any critical operational or safety issues and logistical information.
- May be referred to as the Operations Briefing or the Shift Briefing.



FEMA

Visual 6.50

Operational Period Briefing (3 of 3)

- Prior to start of each operational period.
- All supervisors of tactical resources should attend.
- Planning Section Chief facilitates using a concise agenda.



FEMA

Visual 6.51

Key Participants

Key individuals providing input:

- Planning Section Chief
- Incident Commander
- Operations Section Chief
- Logistics Section Chief
- Safety Officer
- Finance/Admin Section Chief
- Communication Unit Leader
- Medical Unit Leader



FEMA

Planning Section Chief Responsibilities

- **During the Operational Briefing, the PSC has a number of responsibilities, including:**
 - **Distributing the IAP.**
 - **Keeping the briefing focused, less than 30 minutes, if possible**
 - **Identifying location of Division/Group meetings after the Operational Briefing.**
- **What are some additional responsibilities?**
- **What happens after the briefing?**



FEMA

Other Meetings



FEMA

Visual 6.54

Other Meetings and Briefings

- **Command and General Staff Meetings**
- **Transition Meetings**
- **Debriefing/Close-out Meetings**
- **Public Meetings**
- **Agency-specific Reviews**
- **Planning Section Meetings**



FEMA

Command and General Staff Meetings

- Discuss important information affecting team.
- IC determines involvement.
- PSC may be asked by IC to facilitate.
- Need quiet time to assemble team.



FEMA

Visual 6.56

Transition Meetings

- Conducted when teams transition or turn back to local management
- PSC usually facilitates this meeting



FEMA

Visual 6.57

Debriefing/Close-out Meetings

- **Agency Administrator is usually present.**
- **May be held during Transition Meeting.**
- **PSC facilitates.**



FEMA

Visual 6.58

Public Meetings

- **PSC does not usually attend unless requested by IC.**
- **Plans Section provides maps and displays.**



FEMA

Agency-Specific Reviews and Accident Investigations

- PSC involved by IC request.
- Timing and involvement determined by IC.
- Be aware of possible distraction from PSC job during response or incident.



FEMA

Visual 6.60

Planning Section Meetings

- Schedule every couple of days.
- Need quiet time for maximum attendance.
- Good problem-solving time.
- Pulse check.



FEMA

Visual 6.61



Activity 6.3: ICS Form 209 Preparation

Allotted Time: 45 minutes

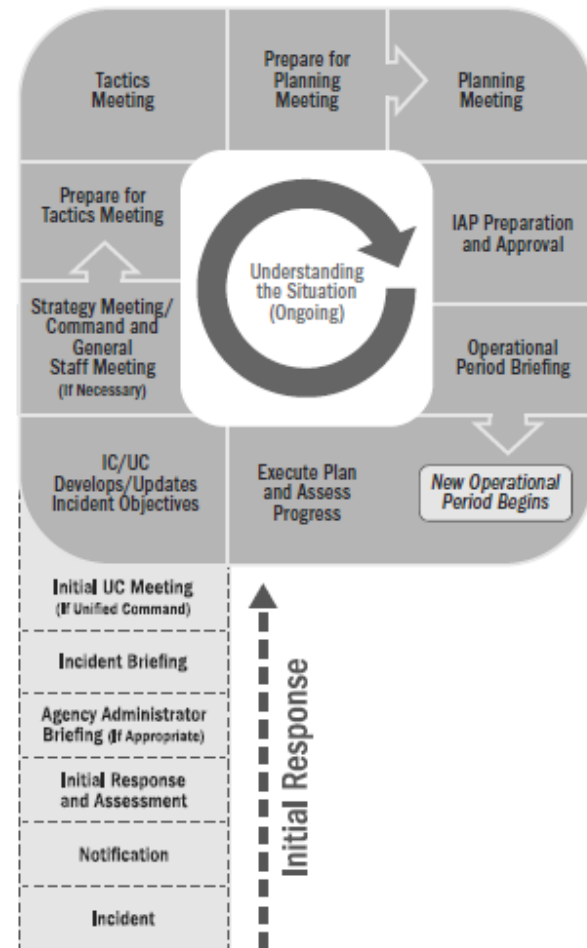


FEMA

Visual 6.62

Unit Summary

- **Monitoring the Operational Period Planning Cycle and facilitating the required meetings is a significant portion of the Planning Section Chief's responsibility.**
- **Keeping the team on track is imperative.**



FEMA

Visual 6.63

Objectives Review

1. **What is the Planning Section Chief's role in the Planning Meeting?**
2. **What is the purpose of the Incident Action Plan?**
3. **What are the components of the Incident Action Plan and who is responsible for preparing it?**
4. **What is the Planning Section Chief's role in the Incident Action Plan?**
5. **Who approves the Incident Action Plan?**
6. **What is the Planning Section Chief's role in the Operational Briefing?**
7. **What other Incident Management Team meetings and briefings might the Planning Section Chief attend?**



FEMA