

J-342

Documentation Unit Leader



Job Aid



NFES 1909

December 1999



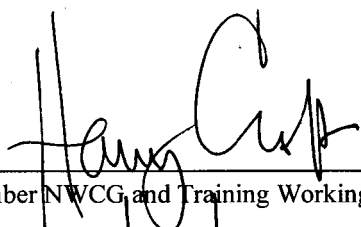
CERTIFICATION STATEMENT

on behalf of the

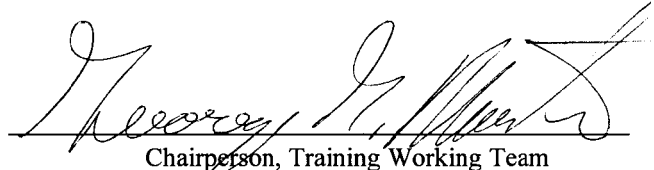
NATIONAL WILDFIRE COORDINATING GROUP

The following job aid material attains the standards prescribed for job aids developed under the interagency curriculum established and coordinated by the National Wildfire Coordinating Group. The instruction is certified for interagency use and is known as:

Documentation Unit Leader J-342
Certified at Level I



Member NWCG and Training Working Team Liaison
Date 12/21/99



Chairperson, Training Working Team
Date 12/2/99

Description of the Performance-based System

The Wildland Fire Qualifications System is a “performance-based” qualifications system. In this system, the primary criteria for qualification is individual performance as observed by an evaluator using approved standards. This system differs from previous wildland fire qualifications systems which have been “training-based”. Training-based systems use the completion of training courses or a passing score on an examination as a primary criteria for qualification.

A performance-based system has two advantages over a training-based system:

Qualification is based upon real performance, as measured on the job, versus perceived performance, as measured by an examination or classroom activities.

Personnel who have learned skills from sources outside wildland fire suppression, such as agency-specific training programs or training and work in prescribed fire, structural fire, law enforcement, search and rescue, etc., may not be required to complete specific courses in order to qualify in a wildland fire position.

1. The components of the wildland fire qualifications system are as follows:
 - a. Position Task Books (PTB) contain all critical tasks which are required to perform the job. PTB's have been designed in a format which will allow documentation of a trainee's ability to perform each task. Successful completion of all tasks required of a position, as determined by an evaluator, will be the basis for recommending certification.

Important note: Training requirements include completion of all required courses prior to obtaining a PTB. Use of suggested training courses or job aids is recommended to prepare the employee to perform in the position.
 - b. Training courses and job aids provide the specific skills and knowledge required to perform tasks as prescribed in the PTB.
 - c. Agency certification is issued in the form of an incident qualification card certifying that the individual is qualified to perform in a specified position.
2. Responsibilities - The local office is responsible for selecting trainees, proper use of task books, and certification of trainees. See the Task Book Administrator's Guide, 330-1, for further information.

J-342

Documentation Unit Leader

Job Aid

PREFACE

J-342 Documentation Unit Leader is a Job Aid which replaces the older I-342 self-paced course and the proposed S-320 Unit Leader courses. The proposed S-320 was dropped from the NWCG curriculum. This new Job Aid was recommended by the subject matter expert group, and authorized by the National Wildfire Coordinating Group (NWCG) through the National Interagency Fire Center (NIFC), National Fire and Aviation Training Support Group (NFATSG), with the coordination and assistance of the following personnel:

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The hard work and dedication of all those involved in this revision is deeply appreciated.

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INTRODUCTION

During the course of any incident or emergency, many activities and actions need to be documented for future reference. This documentation serves a number of purposes. It provides a historical record of the emergency. It can be used to provide personnel with written plans so that their actions can be coordinated. It can also be used for legal purposes if, after the emergency, problems arise which may have to be settled in a court of law. Under the Incident Command System (ICS) the responsibility for gathering and organizing the files for an incident is assigned to the documentation unit leader in the plans section.

This job aid, Documentation Unit Leader, J-342 is designed to help a person successfully perform as a documentation unit leader in the Incident Command System. This job aid may be used in conjunction with the Documentation Unit Leader Position Task Book to meet the recommended performance requirements of this position. It is also intended to be used as an on-the-job reference for qualified documentation unit leaders.

In this job aid you will find information which helps you: prepare for mobilization; perform on an incident; and demobilize the documentation unit. It is designed to be a working tool. It does not cover every situation you might be faced with when performing the job; consequently, space has been provided for you to add your own notes.

Included in this job aid is a section titled Common Objectives (Appendix A). The Common Objectives section is designed to be a general overview as part of training for any of the unit leader positions in the planning section. Take a few minutes and read the Common Objectives section ; it will be referred to many times in this job aid.

Another reference is the Fireline Handbook (Jan. 1998), Chapters 6 and 10.

DOCUMENTATION UNIT LEADER POSITION DESCRIPTION

The documentation unit is responsible for:

- Maintaining accurate and complete incident files.
- Providing duplication service to incident personnel.
- Packing and storing incident files for legal, analytical, and historical purposes.

On a small incident the documentation tasks may be quite simple and can easily be done by the incident commander or by agency communications center. As an incident increases in complexity, so do the documentation procedures and requirements. The complexity of an incident governs when a documentation unit is activated. In most cases the documentation unit will consist of only the documentation unit leader.

The list below are duties to be performed by the documentation unit leader. This list can be augmented as necessary based on incident needs. Note that some activities are one-time actions while others continue for the duration of the incident.

- Obtain briefing from planning section chief.
- Establish and organize incident files.
- Establish duplication service and respond to requests.
- Retain and file duplicate copies of official forms and reports, including those generated by computers.
- Check on accuracy and completeness of records.
- Provide duplicates of forms and reports.
- Prepare incident documentation when requested.
- Maintain, retain, and store incident files for after incident use.
- Maintain Unit Log (ICS Form 214).

RECOMMENDED TRAINING

S-110 - Wildland Fire Suppression Orientation for Non-Operations Personnel

I-200 - Basic ICS

J-342 - Documentation Unit Leader

GENERAL

1. Obtain and assemble information and materials needed for kit.

Before mobilization, prepare a kit with the basic supplies needed to perform as a documentation unit leader. The kit should contain items needed for functioning during the first 48 hours after your arrival on an incident. Your kit should be easily transported and within agency weight limitation. For current weight and gear policy, see the National Mobilization Guide; Chapter 10, section 13.6 Standard cubes, weight and gear policy.

The basic information and materials needed are listed in the Common Objectives section, Mobilization, pages A6-11. In addition to the list in the Common Objectives section the following items should also be included:

- Job Aid: J-342, Documentation Unit Leader
- ICS Forms Catalog (NFES #2435)
- Incident Command System Position Manual - Planning Section (NFES #1984)
- File folders and labels

NOTES:

2. Establish and maintain positive interpersonal and interagency working relationships.

Create a work environment that encourages diversity and equal opportunity for all personnel assigned to the incident.

You will be dealing with persons on the incident and the hosting agency. Treating others with respect and courtesy is vital to establishing positive working relationships. Effective communication is important to maintaining positive working relationships.

Remember to keep the lines of communication open. A good communicator sends a clear message, is an active listener and gives constructive feedback. There are numerous good books and training sessions dealing with communication which you may want to obtain or attend.

For more information see the Common Objectives section at the end of this Job Aid, under “Providing Unit Leadership and Management”, pages A13-16.

NOTES:

3. Provide for the safety, welfare, and accountability of assigned personnel during the entire period of supervision.

Your first priority is safety from the time you are mobilized until the time you return home. As a unit leader, you are also accountable for the safety and welfare of personnel assigned to your unit.

- Recognize potentially hazardous situations.
- Inform assigned personnel of hazards.
- Eliminate hazards, if you can safely do so.
- Ensure that special precautions are taken when extraordinary hazards exist.
- Report hazards to the planning section chief and/or the safety officer.
- Ensure adequate rest is provided to all unit personnel.

For more information see the Common Objectives section at the end of the Job Aid, under “ Providing Unit Leadership and Management”, pages A16-17.

NOTES:

MOBILIZATION

4. Obtain complete information from dispatch upon initial activation.

Completing this task is relatively straight forward but it is something you need to do every time you are dispatched to an incident, no matter what position you are being ordered to fill. Pages A10 and A11 of the Common Objectives section address what you need to know to complete this task.

You can also find the listing of initial off-unit assignment information in Chapter 6 of your Fireline Handbook (Jan. 98).

- Create for yourself a little “cheat-sheet” listing the dispatch information you need, and have it readily available.

NOTES:

INCIDENT ACTIVITIES

5. Arrive at incident and check in.

- Arrive properly equipped with your kit and personal gear.
- Check in at the designated check-in location when you arrive at the incident.
- Obtain the name of the planning section chief and location of the planning section.
- Report to the planning section once you have completed check-in.

6. Obtain briefing from planning section chief.

Read pages A12-13 of the Common Objectives section.

In addition to the list in the Common Objectives section, you should also ask for the following information:

- Expected duration of assignment.
- What duplication services are currently available or on order.
- What are the immediate needs for organizing and storing of documentation records.
- General orientation of camp, base, and/or incident command post.
- A copy of the current incident action plan.

Use available “waiting time” to refresh training, improve organization and communications, check equipment.

NOTES:

7. Organize work area.

Ensure that your work area has enough room to allow you to do your job properly. You will need a place to set up and store files, an area for your work materials and space to set up and store duplicating equipment. You will also need access to electricity and communications.

You can expect that requests for your services will be received while you are setting up your unit. You must be prepared to perform unit duties at the same time as setting up the unit.

The following actions may need to be done when setting up your area:

- Acquire table(s) and chairs.
- Obtain additional supplies not in your kit; e.g., storage boxes for files.
- Check to see if a Planning Section Kit (NFES # 0800) is available or if one has been ordered.
- Acquire communications equipment: telephone, radio, and data communications equipment; e.g., fax machines, computers).
- Arrange work area allowing adequate space for files.
- Develop a method to collect forms outside of your work area.

While setting up the unit, switch over from using your kit supplies to using incident supplies.

- Order supplies to restock your kit to the same condition it was in when you came to the incident.

NOTES:

8. Organize and supervise unit.

There may be occasions when you have personnel assigned to your unit. Refer to the Common Objectives section of this job aid, “Providing Unit Leadership and Management” , pages A13-17. Also keep in mind the following:

- Brief and keep subordinates informed -- Briefing should consist of the same information that you received in your briefing from the planning section chief.
- Review and approve time depending on incident standards.

Also review in the Fireline Handbook (Jan. 1998), Chapter 6 Common Responsibilities, “Inappropriate Behavior” , pages 76 and 77.

NOTES:

9. Assist other units in the planning section to meet priorities and timeframes.

In order for the planning section to complete tasks assigned to it, everybody must their job. During times of low activity, ask the other units if you can help.

Some areas in which you can provide assistance are:

- helping resource unit leader complete incident action plan;
- helping situation unit leader collect information for Incident Summary (ICS Form 209);
- helping status/check-in recorder complete T-cards;
- or any other tasks that need to be completed.

The planning section chief can also assist you by reminding everyone during the planning meeting and operations briefing to submit their forms.

If you haven't done so already, read the Common Objectives section. Assisting other units in the planning section is mentioned in several sections.

NOTES:

MAJOR DUTIES:

10. Establish and organize incident files.

Establish incident files to allow for quick and easy retrieval of documents.

The complexity of an incident determines what files need to be created and organized. For the sake of this job aid we will be dealing with the situation where the incident complexity is such that a documentation unit leader has been ordered and filled.

Separate file folders should be created for each different type of document received. Sometimes separate files will be needed by date, for example a new folder for each day's incident action plan.

Collecting documentation:

Search out and obtain copies of any documentation which might have been produced before you arrived on the incident. Some of this documentation may have been collected by the incident management team when they arrived, some may still be in the responsible dispatch office (even initial response logs will be helpful when preparing the final incident narrative). If you find any information that is not in the files, obtain a copy and file it.

Set up procedures for folks to turn in information which needs to be filed. This can be as easy as a folder attached to a wall, door, etc., or a box where documents can be deposited. This will make it easier for items to be dropped off for filing without your having to be personally handed each item. Consider posting a list of documentation which needs to be turned in to the documentation unit. This should help speed up the demobilization process when that time arrives. Make sure these procedures are communicated to personnel on the incident.

Reviewing documentation received:

In addition to setting up the incident files, you will need to act as a reviewer at times. As various documents are turned in to your documentation unit, you should give them a brief review to see if there are any obvious errors or omissions, for example; the operational period not being filled in on a unit log. Mark each item that you file with the date that you received it.

Electronic documentation:

If computers are being used on the incident, check with the planning section chief to clarify whether the team wants you to coordinate electronic filing.

Prepare and maintain index of incident files.

An index of the incident files is critical to allow for quick retrieval of incident records. The index serves two purposes; 1) it should allow persons on the incident to retrieve needed files during the incident and 2) it should allow for easy retrieval of information after the incident is completed.

There are many ways incident files can be organized. No one way is the only correct way. Some agencies and incident management teams may have a preference for organizing files which has worked for them in the past. This can make the indexing of the files on an incident fairly simple. If you have recommendations that you feel would improve the organization of filing system discuss them with the planning section chief.

Some documentation will be maintained by other sections until the final incident package is prepared. You might offer to assist other sections with organization of their files, especially if you have talked with the hosting agency.

If the index is hand written, ensure that it is legible. If a computer is available, a very professional looking index can be created and then printed out for inclusion with the files.

- Build and maintain the index as files are created and documents are received by the documentation unit during the course of the incident.
- Check with the planning section chief about host agency preferences in organizing the incident files.
- Offer to assist other planning section units in organizing their files.

11. Provide duplication and collation services.

You may be considered the copier expert on the incident. On almost every incident you are dispatched to, a copier will be ordered. You may be asked to assist in ordering the copier.

Take the time to consider what the total copying needs are of the incident, including projecting future copying needs and how those needs can be met. There may be an expectation that a copier will be available whenever someone wants to make a copy. This has implications in how many copiers are needed on the incident, what size of copiers are needed, what type of service and maintenance contract is obtained and what are your back-up plans if your copier(s) stop working in the middle of a high priority copying job in the middle of the night.

Remember that each agency and every incident management team may have certain practices they want to follow. Make suggestions if you see ways to make the duplication services more efficient.

The following list of questions should be answered every time a copier is ordered:

- What is the minimum copying speed (pages per minute) you need?
- Do you want the capability to make two-sided copies (duplexing capability)?
- What size of paper do you want to copy?
- Do you want multiple paper trays to handle several different sizes of paper at the same time?
- Do you want the copier to be able to collate? If so, how many copies do you want the copier to collate at a time?
- Do you want the copier machine to automatically staple copies? This option is usually only available on copiers with collating units.

NOTES:

Consider various alternatives for duplication services, e.g., on-incident, off-incident, contract services.

Rental Copiers

Rental copiers are probably the most widely used method for providing duplication services on an incident.

- Have vendor provide all toner - ensures you have the proper kind of toner.
- **Include a maintenance contract!** Typically these are expressed in terms of how many hours a day the vendor would have someone available for a service call and how many days a week they would have someone available, such as 18/7 (18 hours a day, seven days a week).
- Ensure that the vendor is required to give you training on how to operate the copier, how to clear the inevitable paper jam, and how to change toner, staples, etc.

Local Agency Copier

On some incidents, arrangements might be made with a local agency office to use their copier. This can often be a reasonable back-up plan. If this is done, remember that they will be going through more paper and toner than normal and the copier may need extra servicing. Talk with the planning section chief about making a written agreement with the local office so that there are no surprises.

Copier Service

In some areas of the country there are individuals who are marketing copier services. These will normally set up at your incident camp, base or ICP, and will include persons to operate the copier(s). The copier service is responsible for not only making the copies, but for having the copiers operating properly. You may still have to answer some of the same questions shown on the previous page so that a contract can be prepared to give you the service you need. One advantage to this type of arrangement is that the contractor is responsible for all maintenance and servicing of the copier(s). Ensure the contract has a payment adjustment clause in case the copier(s) are out of service for longer than a specified amount of time.

Commercial Copying

In some cases the hosting agency may have an agreement already set up with a commercial copying and duplication business or be willing to set one up. This may work well for copying and collating the incident action plan, but it usually will not suffice for other copying needs on the incident. The documentation unit will need to establish priorities for duplication in conjunction with planning section time frames.

One of the major duplicating jobs done once or twice each day is the duplication of the incident action plan. This job can tie up a copier for several hours depending on the number of copies to be made.

It is important to communicate the duplication schedule to incident personnel so they can plan their copying around the duplication of the incident action plan. It's a good idea to post the schedule in a highly visible place so that other sections are aware of the schedule. An alternative is to have two copiers in the documentation unit; one large copier for duplicating the incident action plans and a smaller copier to handle other copying needs.

Develop a system for requesting copies. For example:

- Designate a box for requests.
- Attach item to be copied to a General Message Form (ICS 213; copy at back of this job aid).
- General Message form should specify:
 - How many copies do you want?
 - When do you want them completed?
 - Who should be contacted if there are any problems?
 - Who should be notified when the copies are completed?
- Make sure this system is communicated to incident personnel.

(Tip - Have copies of General Message forms complete with the above questions sitting next to the box designated for requests.)

Collation

Your major collation work will be putting together copies of the incident action plan. If your copier also collates, that's great! but collators on a copier are very prone to breaking down. You need to have a back-up plan ready so that if the collator breaks down you can shift gears rapidly and move to your back-up plan. Your back-up plan may include trying another collating copier, which might involve driving and travel time. Another alternative for your back-up plan may involve manually collating the plans. If you are manually collating a large number of plans you will need help. Your back-up plan should be developed with the help of the resources unit leader and the planning section chief.

NOTES:

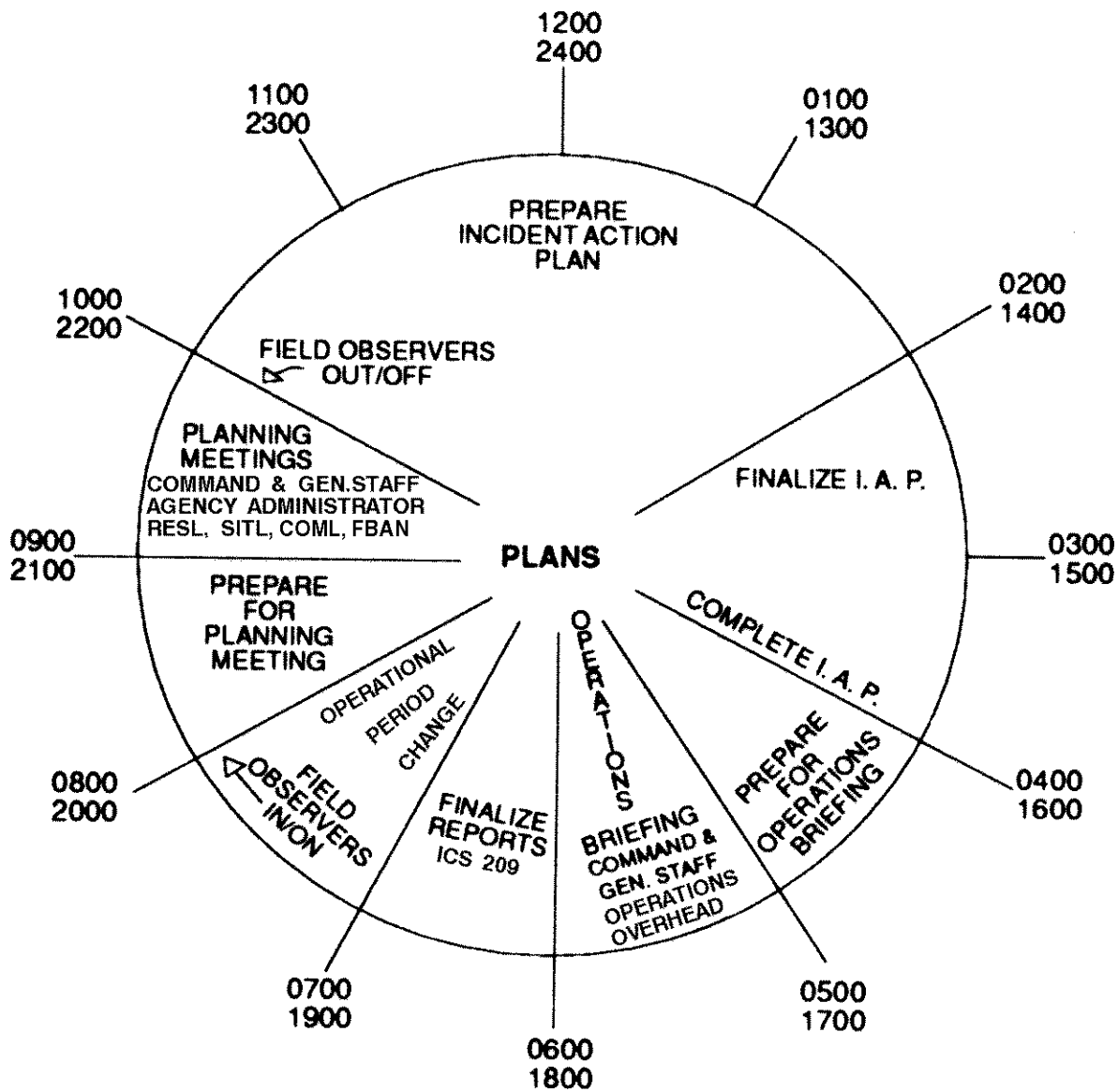
12. Provide incident action plan preparation.

- Know the planning cycle (See Fireline Handbook, Chapter 10 for a description of the planning cycle; see also next page.)
- Ensure that duplication of the incident action plan is coordinated with the planning cycle.
- Determine with the planning section chief and resources unit leader the number of copies needed for each operational period. Allow some extra copies for guests and resources which may arrive during an operational period.
- Determine with the resources unit leader whether the incident action plan needs to be faxed to other locations. If so, specify who will be responsible for the faxing.
- Before making multiple copies of the incident action plan, make one or two high quality copies to be used as masters; then put the originals in the incident files.

NOTES:

THE PLANNING CYCLE

(May vary by team and by incident)



13. Produce final documentation package.

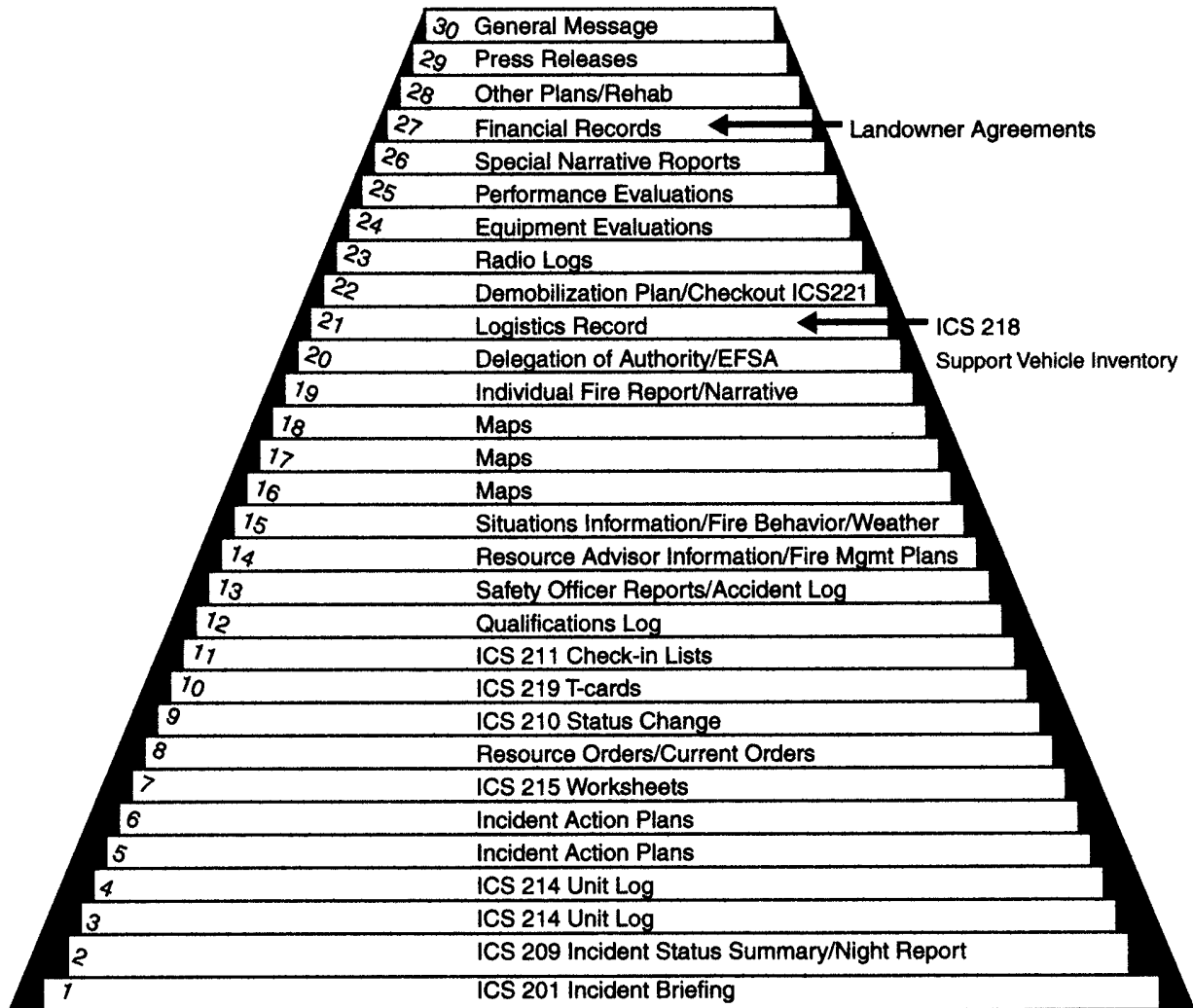
- Final documentation package will contain appropriate files from all sections and units.
- Collect documentation from incident personnel.
- Discuss with logistics and finance sections how their sections' final documentation package will be submitted.
- Determine to whom the final documentation package should be delivered. Check demobilization plan.
- Complete index for final documentation package (see example next page).
- If the long term storage of the incident records is to be in box(es), identify box(es) on outside with incident name, incident number, dates and location.
- Taping the index to the exterior of the box can help people in the future to find information. To protect the index place it in a plastic document protector.
- If multiple boxes are used to file the documentation, have an index for each box, plus an overall index which will tell someone what type of records are in which box.
- Place indexes inside each box in addition to the one on the exterior.
- Provide completed package to planning section chief for final review.

DOCL is ultimately in charge of the final documentation package. Be sure to keep it where others will not be prone to “borrow” from the files.

NOTES:

EXAMPLE

Final Document Package



Incident Name:

Incident Number:

Dates:

Location:

14. Complete ICS Form 214 (Unit Log).

You should complete a Unit Log (ICS Form 214) for the documentation unit for every operational period. A copy of the Unit Log form and the instructions for filling out the form are located at the back of this job aid. (Forms Section)

NOTES:

DEMOBILIZATION

You may be one of the last people to demobilize since everyone else is closing out their files and bringing them to you to be placed in the final incident package. This is when you may need some additional help with the copying, filing and indexing of the incident files.

The Common Objectives section has several pages (pages A18 - 22) on demobilization which will give you a good overview. Take a couple of minutes and read it.

15. Interact with planning section chief and other units on documentation unit release priorities.

Normally the planning section as a whole will discuss the demobilization process as the time to demobilize draws near. If this doesn't happen, discuss the demobilization release priorities for the documentation unit with the planning section chief.

Items that need to be clear to you:

- Release priority of documentation unit personnel
- Timing of release of the copier

Review a copy of the demobilization plan for the incident. If the process for demobilizing duplication equipment/services is unclear, ask questions.

For all personnel assigned to the documentation unit (including yourself):

- Determine date and time they will be tentatively excess to the needs of the incident;
- Ensure the names of documentation unit personnel to be excessed are turned in according to time frames as established in the incident demobilization plan (often 48 hours in advance).
- For documentation unit personnel wishing to be considered for possible reassignment to another incident obtain the following:
 - a. all qualifications listed on the person's red-card;
 - b. length of time on fire assignment since last day off;
 - c. any specific needs or limitations.

16. Plan for demobilization and checkout.

You should receive a briefing on the demobilization process from your supervisor. The demobilization plan usually specifies that the documentation unit leader will sign the Demobilization/Check-Out sheets (ICSForm 221) to certify that a person or resource has turned in all of their required documentation. You should coordinate with the planning section chief on what documentation resources should have submitted (for example; Who is required to turn in a Unit Log? What about performance evaluations?). If this is unclear to you, ask questions. If you are unsure, you won't be able to explain it to the folks coming to you for your signature.

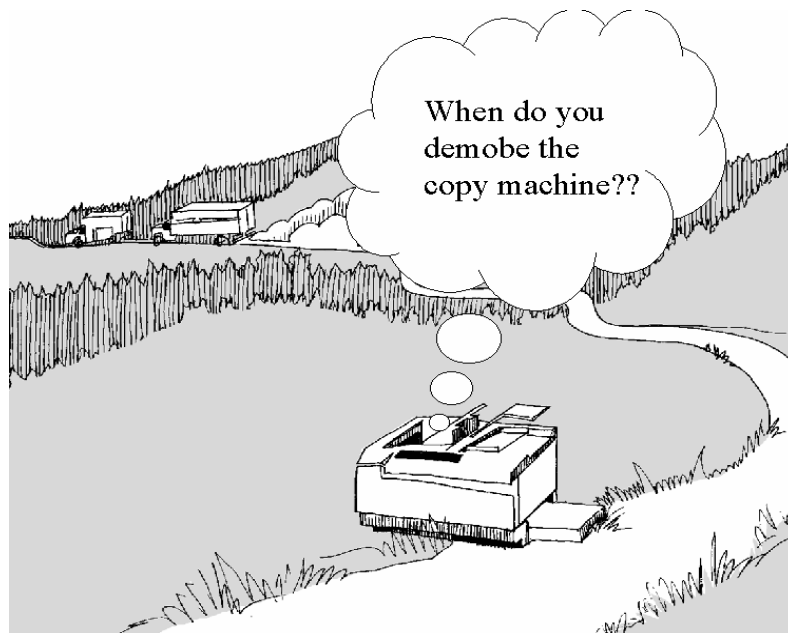
- Brief personnel working for you with the same information you received.
- Follow the demobilization plan as it applies to the documentation unit.
- Before signing off on the Demobilization/Check-Out sheet (copy at back of this job aid), ensure the resource has turned in all required paperwork.

NOTES:

17. Demobilize documentation unit.

- Demobilize as directed by planning section chief.
- Brief unit personnel on procedures for closing out unit operations and ensure they understand them.
- Ensure documentation unit personnel complete demobilization procedures as outlined in the demobilization plan.
- Order replacement supplies for those used out of the plans kit, and those used out of your personal kit which you have not previously replaced.
- Return excess equipment and supplies to supply unit.

- Complete performance evaluations as per agency guidelines.
- Demobilize the copier per schedule agreed upon with the planning section chief.
- TIP: Post the demobilization schedule for the copier(s) so everyone can see it and they can make their plans accordingly.
- Deliver final documentation package to designated person.



NOTES:

FORMS

See ICS Forms Catalog, NFES 2435, for a complete listing of ICS Forms.

DEMOBILIZATION CHECKOUT

ICS-221

1. INCIDENT NAME/NUMBER	2. DATE/TIME	3. DEMOB. NO.
4. UNIT/PERSONNEL RELEASED		
5. TRANSPORTATION TYPE/NO.		
6. ACTUAL RELEASE DATE/TIME _____	7. MANIFEST YES NO NUMBER _____	
8. DESTINATION _____	9. AGENCY/REGION/AREA NOTIFIED NAME _____ DATE _____	
10. UNIT LEADER RESPONSIBLE FOR COLLECTING PERFORMANCE RATING		
11. UNIT/PERSONNEL. YOU AND YOUR RESOURCES HAVE BEEN RELEASED SUBJECT TO SIGNOFF FROM THE FOLLOWING: (DEMOB. UNIT LEADER CHECK <input checked="" type="checkbox"/> APPROPRIATE BOX)		
<u>LOGISTICS SECTION</u>		
<input type="checkbox"/> SUPPLY UNIT _____		
<input type="checkbox"/> COMMUNICATIONS UNIT _____		
<input type="checkbox"/> FACILITIES UNIT _____		
<input type="checkbox"/> GROUND SUPPORT UNIT LEADER _____		
<u>PLANNING SECTION</u>		
<input type="checkbox"/> DOCUMENTATION UNIT _____		
<u>FINANCE SECTION</u>		
<input type="checkbox"/> TIME UNIT _____		
<u>OTHER</u>		
<input type="checkbox"/> _____		
<input type="checkbox"/> _____		
12. REMARKS _____ _____		
221 ICS 1/83		

**INSTRUCTIONS FOR COMPLETING THE DEMOBILIZATION CHECKOUT
(ICS FORM 221)**

Prior to actual Demob Planning Section (Demob Unit) should check with the Command Staff (Liaison Officer) to determine any agency specific needs related to demob and release. If any, add to line Number 11.

Item Number	Item Title	Instructions
1.	Incident Name/No.	Print Name and/or Number of incident.
2.	Date & Time	Enter Date and Time prepared.
3.	Demob No.	Enter Agency Request Number, Order Number, or Agency Demob Number if applicable.
4.	Unit/Personnel Released	Enter appropriate vehicle or Strike Team/Task Force I.D. Number(s) and Leader's name or individual overhead or staff personnel being released.
5.	Transportation	Method and vehicle I.D. Number for transportation back to home unit. Enter N/A if own transportation is provided. *Additional specific details should be included in Remarks, block #12.
6.	Actual Release Date/Time	To be completed at conclusion of Demob at time of actual release from incident. Would normally be last item of form to be completed.
7.	Manifest	Mark appropriate box. If yes, enter manifest number. Some agencies require a manifest for air travel.
8.	Destination	Location to which Unit or personnel have been released, i.e., Area, Region, Home base, Airport, Mobilization Center, etc.
9.	Area/Agency/Region Notified	Identify Area, Agency, or Region notified and enter date & time of notification.
10.	Unit Leader Responsible for Collecting Performance Ratings	Self-explanatory. Note, not all agencies require these ratings.
11.	Resource Supervision	Demob Unit Leader will identify with a check in the box to the left of those units requiring check-out. Identified Unit Leaders are to initial to the right to indicate release. Blank boxes are provided for any additional check, (unit requirements as needed), i.e. Safety Officer, Agency Rep., etc.
12.	Remarks	Any additional information pertaining to demob or release.

APPENDIX A

COMMON OBJECTIVES for planning section unit leaders.

COMMON OBJECTIVES

Pre-course work for Unit Leader Training in the Planning Section

This pre-course work is designed to be a general overview for people taking the training for any of the unit leader positions in the planning section. This pre-course work is general in nature because the more specific information will be presented in the formal course work. Information presented in this pre-course work will be reviewed as part of the course.

Topics covered in this pre-course work include:

1. Planning Section Overview
2. Mobilization
3. Incident Activities
4. Demobilization

Planning Section Overview

OBJECTIVES:

1. **Identify the section's mission, responsibilities, and functions.**
2. **Describe the relationship of your unit within the overall section and incident management organization**

I've been selected to take training to be a unit leader in the planning section. Wonder just where I fit in?

Your position is as a member of the planning section. The planning section is responsible for: the collection and evaluation of incident situation information; preparing situation status reports; displaying situation information; maintaining status of resources; developing an Incident Action Plan; coordinating the incident demobilization; providing a primary location for technical specialists assigned to an incident; providing duplication services; preparation of required incident related documentation; and collecting official documentation of the incident.

One of the most important functions of the planning section is to look beyond the current and next operational period, and anticipate potential problems.

The planning section is comprised of a planning section chief and may include the following unit leader positions; situation unit leader, resource unit leader, demobilization unit leader, and documentation unit leader. Descriptions of the above positions can be found in Fireline Handbook, NWCG Handbook 3 (PMS 410-1).

Other positions that may be assigned to the planning section include: status/check-in recorders, field observers, display processors, and technical specialists such as fire behavior analyst, human resource specialist, training specialist, and meteorologist.

Incident Command System Organization Chart
(see I-200, Organizational Overview Reference Text, Module 3 (NFES 2443),
page 3-27 for chart)

Ok. So just what do these different units in the planning section do?

The resources unit is responsible for all check-in activity, and for maintaining the status on all personnel and equipment assigned to the incident.

The situation unit collects and processes information on the current situation, prepares situation displays and situation summaries, develops maps and projections.

The documentation unit coordinates preparation of the incident action plan, maintains all incident-related documentation, and provides duplication services. When no documentation unit is established on an incident, these duties are normally assigned to the resources unit.

The demobilization unit ensures that an orderly, safe, and cost-effective release of personnel and equipment will be made when they are no longer required at the incident.

The interaction and coordination between these units is briefly described in the Fireline Handbook. These interactions and coordination will be covered in more detail in your course.

As a member of the planning section, you are a member of a team. Webster's dictionary defines a team as "a group organized to work together" . Each unit in the planning section has its duties that are necessary to complete the whole planning process. Understanding your position and knowing the planning section's priorities allows you to assist other units thereby helping the entire planning section be successful. By helping out other units you may find an extra hand or two when you need them in your unit.

Sounds like coordinating with, and helping out the other units in the planning section is important.

MOBILIZATION

OBJECTIVES:

- 1. Considering agency weight and transportation limitations, list the contents in your kit needed for functioning in your position for the first 48 hours. Describe how 10 of these items would be used in the first 48 hours.**
- 2. List at least seven critical information items you are required to obtain from dispatch upon initial activation.**

I just received a call from dispatch. I'm heading for an incident! All right! I'm ready!! Let's get this show on the road!



Are you really ready?

Of course I am! ... What do you mean, 'am I ready'?

Being ready for an incident assignment starts well before you receive a call from dispatch giving you an assignment. It involves not only getting your gear together, which we'll discuss in a bit, but also working with your supervisor and co-workers so that they know that you may be leaving.

The time between when you get a call from your dispatch center and when you need to be travelling can vary from minutes to several hours depending on the situation. Making arrangements in advance with your supervisor and co-workers about what will happen to the work you normally do, if you receive an assignment, goes a long way towards gaining their support of the fire organization (and towards your being available for future assignments). After you receive your

call from your dispatch center, don't forget to give your supervisor a call to let him/her know that you've actually received an assignment and are leaving.

Ok. Ok. I've worked it out with my supervisor and co-workers. And I've called my boss. I'm out of here!



It is important to be able to leave in a timely manner, but you won't be able to immediately contribute in your position at the incident if you haven't put in a little pre-planning on just what you need to take with you. The gear you take with you normally will fall into one of two categories, personal gear or position gear. But, before you start packing you'd better know how much of your house and office you're allowed to

take with you. There are weight restrictions that apply to how much gear you can take with you on an assignment. If you are in doubt about what the weight limits are, or aren't sure, ask your dispatching office (but don't wait until they're calling you for an assignment). These weight limits are shown in the National Interagency Mobilization Guide. Can you find them?

Your personal gear includes your clothing, toiletry items, comfort items, possibly a tent and/or sleeping bag (a book to read during inevitable waits isn't a bad idea either). We won't go over all the items you might need or want in your personal gear in this course; you should have already received this type of information in your basic course on incident management prior to this unit leader training.

Ok. Ok. Can you get on with it? I want to get going!



Sure thing. But before you leave let's make sure you have the equipment you'll need to do your work when you get to the incident. Let's talk about your unit leader kit.

If you're lucky, the incident will all be organized before you arrive and with all the supplies you need to do your job as a unit leader in the plans section. But what if it's not? You, as a unit leader are expected to arrive with most of the supplies you would need to do your job for the first 24-48 hours. This includes any office supplies you might need in addition to any specific items needed for your particular unit leader position. In this pre-course work we'll only deal with the general items needed by most unit leaders in the plans section. The specific supplies which might be needed for your particular unit leader position are covered in your unit leader course.

The following three items need to be in your unit leader kit:

National Interagency Mobilization Guide
Fireline Handbook (NWCG Handbook 3)

ICS forms

- ICS-213 - Carry a small supply (15-20) general message forms (ICS-213). These are the standard way of sending and documenting messages in the incident command system.
- ICS-214 – a small supply of Unit Logs (ICS-214). As a unit leader you will be expected to fill out one of these for every work period.
- Forms that are specific to the particular unit leader position that you are training for will be discussed in your unit leader course.

The following is a list of general supplies that might be needed by any unit leader position in the planning section:

- Pens - always carry several, one may get wet, someone's always wanting one, and when you need one you want to be sure you have one. (Remember, you are going to an emergency situation; you may not want to take that special pen that was given to you on a special occasion.)
- Pencils - again always carry several, also think about how you'll sharpen these when you're away from an office setting. Mechanical pencils will work, but should not be totally relied on because you'll need the specific lead, extra erasers, etc. If you choose to carry a mechanical pencil, carry a few good old fashion wooden pencils as back-ups.

- Pads of paper - every position will need to be making notes at some time. Carry what you're used to and what works for you. Some people prefer a clip board, some a steno- pad, what you carry isn't as important as that it be functional for you. Again, an extra pad or two isn't a bad idea.
- Marking pens - depending on the incident you are going to, you may be writing on large sheets of paper, a white board, or some sort of clear mylar plastic. Carrying a couple of colors in each of these types can make a big difference in being able to immediately start displaying some of your unit's work. Make sure your markers for the white boards are the "dry erase" type.
- Carbon paper - when you first arrive at the incident you may not have a copy machine. A package of 12-24 sheets of carbon paper does not weigh much and can be very useful in the first planning period.
- Stapler - You will always have to put a few sheets of paper together. You may be surprised how often your small travel-sized stapler is used (be sure to also pack a supply of the proper type of staples). Staples work well for situations where you'll want several pieces of paper to stay together for a long period of time. (Clam clips are being used for this purpose in some places. These work well, but replacement clips are not readily available in some smaller towns. Extra clam clips take up more space than staples. Clam clips work well as a replacement for paper clips as opposed to staples.)
- Staple puller
- Paper clips
- Rubber bands
- Tape - a roll of clear tape and a roll of masking tape will help with putting things together and in posting information.
- Sticky notes – a small supply of the sticky note pads can be very valuable for quick updates in planning.

You might have some additional items that you find helpful, and more recommendations will come in your unit leader course. The important idea is that

you arrive with the supplies needed to do your job for 24 to 48 hours, on the assumption that in this amount of time you will be able to obtain more supplies.

Oh, did I mention that this also falls under the weight limitations discussed earlier?

*Whew. Ok. I've got my things together. Did ...
Did I Did I mention where I was going
No? Well,*

I... I'd better call dispatch back.



Getting the proper information from your dispatch office is critical to efficient mobilization to an incident. The following is a list of the information you need to get from your dispatching office when they call with an assignment. (Hint: the easiest way to get most of this information is to get a copy of the resource order form which most dispatch offices fill out when they get an order. The resource order form will not have your travel arrangements on it so you will have to get these separately.)

- Position assignment – This is the position the incident needs to fill and which you have been assigned to fill. On the resource order form, this may be listed as a mnemonic (example: Situation Unit Leader = SITL)
- Resource Order number – This is also known by some as the “fire number”. It should be a two-letter state designator, three-letter unit identifier and up to a six-digit alpha-numeric incident number. (example: UT-SLD-33333D).
- Request number – This is also known as your “O” number (example: O-131). The “O” stands for overhead. When you receive an assignment as a unit leader, you will be in an overhead position.
- Incident name – Name of the incident you are being assigned to.
- Reporting time – When does the incident expect you to arrive?

- Reporting location – This is where the ordering office expects you to arrive.
- Contact phone number(s) – This is the phone number that you should call if you have problems with your travel once you leave your home unit. Believe it or not, your dispatching office and the receiving unit both know how you are supposed to travel to the incident and when you are due to arrive. If you are flying commercial airlines, they even know your flights. So, if something happens en route (such as missing an airline connection, or a vehicle problem that is going to cause you to arrive by a different method, or at a later time,) you need to let this contact number know of your changes.
- Financial charge code – These are different for different agencies. Make sure you have the proper code for your agency.
- Travel arrangements – How are you expected to get to the incident? Travel arrangements can be complex and the rules governing travel are also. Here are a few things you need to think about. If it isn't too far, or depending on the needs of the incident, you may be asked to drive. If so, what vehicle does your home unit have available? Do you need to tell anyone that the vehicle will be gone? If you are flying, is it by charter aircraft or commercial? If the airport isn't close to your office or town, how are you going to get to the airport? If you're flying on a commercial airline, what are your flight numbers and times? Will you be met at the far end, or are you expected to get a rental vehicle? How? Does a special travel authorization need to be prepared by your home unit? The key is to talk to your dispatch office. Most dispatchers have organized travel a good deal. Take advantage of their expertise, but YOU need to know how you are supposed to get to the incident.

... Shouldn't you be on your way by now?

You're right! Thanks for helping me. I might have forgotten some things if we hadn't spent this time.

INCIDENT ACTIVITIES

OBJECTIVES

1. List 10 items of information to obtain from the initial briefing with your section chief.
2. Describe the role of the unit leader in providing leadership and management in the incident unit organization.

INITIAL BRIEFING



After a long, exhausting trip you have finally made it to the incident.

Yea!!! But wait, where am I??? Have I landed in a foreign country??..... What do I do next???

The first and most important step is to check in, and there may be several different locations for this at the incident. Check-in officially logs you in at the incident and provides important release and demobilization information. You normally only check in once at an incident. Check-in may be found at the incident command post or incident base.

Now that's completed; what's next?

After checking in you should find the planning section chief and ask for a briefing. The key points of this briefing should include but not be limited to the following:

General Information

- Assess current situation.

Size/complexity/potential of the incident
Number of resources by agency and kind

- Identify your specific job responsibilities.
- Identify co-workers within your job function.
- Locate work area.
- Identify eating and sleeping arrangements.
- Procedural instructions for obtaining additional supplies, services, and personnel
- Identify operational periods.
- Clarify any important points pertaining to assignments that may be questionable.
- Provide for specific debriefing at the end of an operational period.

Unit Specific Information

- Information to be solicited from incident resources for tracking purposes (RESL)
- Review ICS Form 201, Incident Briefing, if available (RESL/SITL).
- Project complexity of demobilization effort (DMOB).
- Local agency contact for demobilization plan review (DMOB)
- Requirements for unique or specific considerations to be included in demobilization plan (DMOB)

The planning section chief will also brief you on the duties, responsibilities, and expectations of your unit. You will give a similar briefing to personnel assigned to your unit. It is important that they understand what you expect of them.

PROVIDING UNIT LEADERSHIP AND MANAGEMENT

OK. Now I'm ready to begin work. But....how do I get all this work done???



Wait! You may or may not have supervisory duties at your home but as a unit leader you may have personnel assigned to you. It's helpful to have attended a leadership and management course prior to an incident

assignment. Dynamic Unit Leadership S-301 is specifically geared toward incident management personnel. S-301 is also a suggested course for unit leaders in PMS 310-1, the Wildland Fire Qualification Subsystem Guide. There are other courses that your agency may sponsor, as well as some in the private sector, that can help you gain this knowledge and skill. In the long run, it will benefit you not only on an incident, but in your career as well. The following few paragraphs describe some of your management and leadership responsibilities. This is just a place to start. You will have ideas of your own.

At a start of an incident you may be the only person in your unit, but as the incident becomes more complex you will need personnel to help you get the job done. An important duty will be to plan ahead as soon as it looks like the incident will be getting more complex. Order more people. Don't wait until you need them. It can take 12 hours or more for personnel to get to the incident depending on the availability of resources. If your incident is the only show around, resources will probably be there in 12 hours, but if nationally a lot is happening then resources may be hard to come by, and it may take 72 hours or more to get what you need. Not only that but the resource may be coming from the other side of the country and, yes, Alaska and Hawaii are part of the country and can have long travel times. The plans section chief should cover the procedures for ordering resources in the initial briefing.

Now, I have all these people what do I do with them?



DELEGATE. Make sure the people working in your unit know what you expect; e.g., if a form needs to be filled out in a certain way make sure they understand how to do that. Then allow them the freedom to do the work in the manner they are comfortable with as long they meet the deadlines set by the planning cycle.

Remember each person is an individual, they will have different work habits and levels of experience. Some people may require a lot of time. They need a lot of feedback on how they are doing to keep them motivated. Other people will require very little instruction; they know the job. They may even know it better than you do. They require very little of your time. It can be easy to forget the

personnel who require very little supervision. Let them know once in a while that they are doing a good job. Praise can go a long ways to keeping people motivated.



I heard that there's a lot of concern about harassment.

You are correct. The federal incident management system has a zero tolerance policy related to discrimination and/or harassment. Federal Equal Employment Opportunity (EEO) laws and regulations that apply in your home unit still apply on the incident. If unfamiliar with EEO laws please contact your EEO Manager at your home unit before going on an incident. Remember sexual harassment, discrimination (age, racial, sexual, etc), are all prohibited and illegal activities. When a problem is brought to your attention YOU MUST ACT. Correct and report all such activities to the planning section chief. On larger incidents a human resource specialist will be assigned to the incident. That person may also be brought in to work with these situations. Just remember to use the chain of command. Any violation of laws or regulations can be a reason to send personnel home. These actions are considered very serious. They must be dealt with immediately and properly. Get the help you need as soon as the situation arises.

This is a very complex subject and can not be fully explained in this pre-course work. If you are unsure or have questions related to this topic, ask them during your unit leader course.

Wow! I get the message that this is really serious. I can see that working with my fellow employees as a unit leader is a little different from what I've done before.

As a unit leader you are accountable to your supervisor and to the incident. Know the planning cycle clock and set the unit's schedule to meet its and the other units' timelines. Remember you are part of a team. It is important that assignments are completed in a timely manner. A delay in one unit can have repercussions through the entire planning section and in turn throughout the incident.

Help other units meet priorities and timelines; make assigned personnel available to assist other units when time allows. It will also provide personnel experience in other aspects of the planning section.

Problems and situations will arise which you had not planned and are not prepared for; if you remain flexible these situations will be easier to deal with. Expect the unexpected. Make it clear to assigned personnel during their briefing that you want to hear about problems and then take action and give feedback on what is being done. Make sure you maintain two-way communications with assigned personnel. This will head off later problems within the unit.

Remember you represent the incident management team and/or your agency. Be sure to conduct yourself in a professional and friendly manner.

Establish and maintain positive interpersonal and interagency working relationships. Agencies have different values and policies that can affect the operations. Differences should be discussed and resolved in a manner that fosters continued positive working relationships.



Gee. All this is making me tired and hungry.

It is your responsibility to ensure that your subordinates are getting adequate rest, at a minimum 8 hours of rest in a 24 hour period. Remember this when setting your unit's schedule. Also see that work and rest areas are separate. If not, talk with the facilities unit leader to see if it is possible to make a change.

Don't forget meals, it may seem like this is an unnecessary reminder but when you are busy on an incident it is very easy to forget to eat. Make sure you schedule time for assigned personnel to eat. Their heads will be clearer and they will have the energy needed to get through the day.

Personal hygiene is important. Just because you're on an incident doesn't mean that you can forget about hygiene (not only is it unhealthy, it is offensive to the people you are working with).

Even though you are in an overhead position now and not out on the line, don't forget about safety. There are hazards in camp that can impact your personnel's well being. Your personnel may have to deal with extreme heat to cold, insect bites - not just the kind that make you miserable by itching but may cause severe allergic reactions - smoke from fires, and dust. And the hazards don't all come from the air; look at the ground in camp. Do you have fairly flat terrain or uneven? Watch your step. What other hazards are there?

The unit leader prepares and gives performance evaluations to subordinates. Evaluations should be honest and one to one. The evaluations should be in area away from distractions and where the unit leader can give his/her full attention. Point out what the subordinate did well as well as what he/she needs to work on. Your attitude will go a long way to make it a positive experience or a negative one.

DOCUMENTATION

Every unit has documentation requirements; the unit course you are about to attend will cover this in detail. Official copies of documentation will go to the documentation unit leader or a designated person. Your unit's documentation needs to be organized in a way that you as well as someone else on the incident can easily find and retrieve needed information.

This is a lot to remember. Am I really going to be doing all these things?

You sure are. But remember, you are a member of a team. If you need help or are unsure, ask someone. Everyone in the planning section works together. Each person is important and all want the section to be successful. Don't be afraid to ask for help if you need it, and don't hesitate to give help when you can.



DEMOBILIZATION

OBJECTIVES:

1. List the unit level's responsibilities for implementation of the demobilization process.
2. Compile information needed to identify pre-release priorities for your unit.



Hey! Looks like we are finally going to be heading home.

This sounds great. How are your plans for demobilizing your unit coming?

My plans for demobilizing my unit?



Just as there was some planning that was done before you mobilized to this incident, there's some planning that needs to be done to close down your unit. You need to plan how you will demobilize your unit. Early planning for demobilization is essential for a smooth, orderly and efficient demobilization. The demobilization and/or resources units do much of the early work on demobilization planning.

Normally the planning section as a whole will discuss demobilization as the time to demobilize draws near. If this doesn't happen, you need to discuss the demobilization of your unit with the planning section chief. In addition you need to review a copy of the demobilization plan if your incident has one.

Demobilization Plan? I've seen those posted, but I've never really paid much attention to them. Aren't they just for the overhead? If I have to read them, this is starting to sound pretty complex.



The demobilization plan, if your incident has one, is normally prepared by the demobilization unit leader in the planning section (or the resources unit leader if there's no demobilization unit set up). The demobilization plan is a working agreement between the incident's organization and the host agency on how all of the resources that have been ordered for this incident will be returned, released, or sent home.

Although demobilization plans will often look very similar, there are usually differences because of the specific situation that may affect your responsibilities. The demobilization plan should tell you priorities for release and give you specific information on the units' responsibilities for the specific incident. It should also tell you the lead time necessary for releasing various types of resources. Incident personnel normally have a good deal of interest in how long this lead time is. For these reasons, it is important that you read the demobilization plan when it's complete to ensure you understand the unique features related to this particular incident.

UNIT LEVEL'S RESPONSIBILITIES FOR IMPLEMENTING THE DEMOBILIZATION PROCESS.

Ok. I've read the demobilization plan but I still am a little confused about what I have to do.



When planning the demobilization of your unit you will need to consider your unit's personnel; your unit's supplies, materials and equipment; organizing the unit's documentation; and supplying the needs of any replacement personnel who might be arriving to take over the incident.

Releasing people may be simple or complex depending on what sort of travel arrangements are needed, and what sort of other incident activity is occurring at the time your incident is releasing personnel. Planning an organized release of personnel requires you, in coordination with the planning section chief, to identify who will be excess to your unit's needs and the date and time they will become excess. A tentative release schedule for personnel should be developed with the planning section chief and this tentative schedule needs to be shared with your

personnel. Additional information that may be needed to efficiently plan for the release of personnel will be covered later in this pre-course work.

All right. I've got that. What's next?

In addition to releasing personnel, you need to consider what to do with the equipment, materials and supplies that have been ordered for your unit. Coordinate release of equipment with other sections, and return materials and supplies to the supply unit. The key for you is to figure out how much of this you can release and when it can be released. In planning for demobilization of equipment and supplies, you need to keep what is needed to do your unit's work, but start releasing/returning excess equipment, supplies and materials early. The reason for this is so there isn't a huge pile of excess things turned over to the supply unit on the very last day, when they also are trying to get things demobilized.

Finally, every unit keeps documentation of one sort or another. At demobilization time, there is usually a file of some sort being put together as a package of all the documentation for that incident. This incident package is turned over to the host unit and becomes their official files of all the activities related to that incident. It is part of your demobilization responsibilities to prepare your unit's files for inclusion in the incident package. Your documentation needs to be well organized. One way to do this is to consider 'how would someone who knows nothing about my unit find something we have done'.

In some cases, you may be leaving but the incident is continuing. In this case, one of your duties is to brief your replacement. Your briefing needs to cover all the things going on in your unit that might affect the next unit leader's ability to carry on the functions of the unit. Some of the items you will need to cover are: unit's personnel, incident's situation, the status of equipment, supplies and materials, an orientation to the work area, specific time requirements, status of the unit's documentation, and any unfilled order requests. This list is not all-inclusive and there may be other items you need to share based on the specific incident.

Whew. There's more to demobilizing from an incident than I'd considered.

Hang in there. We're getting close but there are a few details we need to review yet.

COMPILE INFO TO IDENTIFY PRE-RELEASE PRIORITIES.

The primary resources that this responsibility applies to are equipment and personnel. For equipment, the most common factor affecting the pre-release priorities is the cost. If your unit is using some equipment that is costing the incident a lot of money it will undoubtedly be considered for early release.

Didn't you say you were going to give me more information on releasing personnel?

You are correct. At demobilization, one of the first questions you may be asked to address regarding personnel is whether some of your unit's personnel are available for reassignment to another incident. The answer to this question can vary based on a number of factors. First, while some of the personnel in your unit may want to be reassigned to another incident, others may want to return home for any number of reasons. You will need to collect this information so it can be passed along the dispatch chain to see if any reassignments are available.

For those individuals wanting a reassignment, find out how many continuous days the individual has been working on fire assignments away from their home duty station. This becomes very important information when there is a lot of fire activity occurring at the same time. And also collect a listing of all of the ICS qualifications for each person (this information should have been collected when they checked in at the incident, but that does not always happen).

The possibility of a reassignment always seems to cause stress at demobilization time. It's not so difficult if you think of it as just mobilization to another incident from a different location than your home unit. You can help eliminate some of this stress by working with your personnel to help them understand how reassignments work.

As you are preparing to demobilize, you need to take a look at your unit leader kit. If you have used supplies out of your kit during the incident, replacing those supplies at the incident is a legitimate charge to the incident. You should restock your kit before leaving so it is ready to go for your next assignment.

If you are unsure of anything related to demobilization, ask questions. The planning section chief and/or demobilization unit leader on your incident should be able to talk with you and/or your personnel about the process.

FURTHER INFORMATION

You know, some of these things we've been talking about sound very familiar. I think I've read something like this before.

You're right. The information that has been presented in this pre-course work is fairly general; it applies to all of the planning section units, and you may have been exposed to it before. It is also information you should have available to you as a trainee for a unit leader position. Take a look in your Fireline Handbook. There's an entire chapter titled 'Common Responsibilities' which covers much of what we've just reviewed. Also, take a look in the latest National Interagency Mobilization Guide; Chapter 10 has some pertinent information. Because the National Interagency Mobilization Guide is updated yearly, it may have more current information (such as weight and gear policy) than the Fireline Handbook.

Thanks. I'll take a look.

TEST

Planning Section Unit Leader Courses Pre-Course Work

Using the information from your Fire Handbook, the National Interagency Mobilization Guide and this pre-course work packet, answer the following questions.

1. List 7 responsibilities of the planning section.

2. Select two units in the planning section other than the unit you are training for. Describe how your unit interacts and coordinates with each of these other units.

3. List the current weight and gear policy that applies to you when dispatched away from your home duty station as a planning section unit leader.

4. List 10 items that you should carry in your unit leader kit and tell why it is important to have them for use in the first 48 hours.

5. List 7 information items you should obtain from your dispatch office upon receiving an assignment.

6.
 - a. From whom should you receive your initial briefing when you arrive at an incident as a unit leader?

 - b. List 8 items that you should obtain in your initial briefing after your arrival at an incident.

7. List 8 items related to your role as a unit leader in providing leadership and management and tell why they are important.

8. List 4 items that are part of your unit's responsibility in demobilization.

9. List the 2 main information items that are most important when you are demobilizing an individual from your unit who is interested in receiving a reassignment.

TEST ANSWER SHEET

Planning Section Unit Leader Courses Pre-Work

To the instructors: The answers to all the questions on this test are located in one of three sources: Fireline Handbook; National Interagency Mobilization Guide and the pre-course work booklet. Text book answers are shown below. Students may have answers that differ from those listed below, but for which they may have good rationale. Instructors should be guided by their own experience and the rationale given by the student in determining whether to accept the student's answer.

1. List 7 responsibilities of the planning section.

Intended Answer: Any 7 of the following:

**Collecting and evaluating incident situation information;
preparing situation status reports;
displaying situation information;
maintaining status of resources;
developing an Incident Action Plan;
coordinating the incident demobilization;
providing a primary location for technical specialists assigned to an incident;
providing duplication services;
preparing required incident- related documentation; and
collecting official documentation of the incident.**

2. Select two units in the planning section other than the unit you are training for. Describe how your unit interacts and coordinates with each of these other units.

Intended Answer: - All answers found in Fireline Handbook. Answer is dependent on the course being instructed.

Resources Unit - provide resource summary information to situation unit, Provide demobilization unit leader with list of surplus resources and probable release times, prepare resources unit documentation for final

incident documentation package and give to documentation unit.

Situation Unit - obtain resource summary information from resource unit, Provide fire behavior information and fire weather forecast for IAP, prepare situation unit documentation for final documentation package and give to documentation unit.

Demobilization Unit - Obtain list of surplus resources and probable release times from resources unit, prepare demobilization unit documentation for final incident documentation package and give to documentation unit.

Documentation Unit - Collect other unit's documentation for final documentation package, and provide duplication services for other units.

3. List the current weight and gear policy that applies to you when dispatched away from your home duty station as a planning section unit leader.

**Intended Answer: Soft pack (red bag) 45 lbs, Briefcase or Web Gear 20 lbs
Reference: National Interagency mobilization Guide Chapter 10, Section 13.6
Standard Cubes, weight and gear policy for all personnel.**

4. List 10 items that you should carry in your unit leader kit and tell why it is important to have them for use in the first 48 hours.

Intended Answer: Any 10 of the items listed below. Note: they also need to tell why, not just list the items)

**National Interagency Mobilization Guide
Fireline Handbook (NWCG Handbook 3)**

ICS forms:

ICS-213 - Carry a small supply (15-20) general message forms (ICS-213). These are the standard way of sending and documenting messages in the incident command system.

ICS-214 – a small supply of Unit Logs (ICS-214). As a unit leader you will be expected to fill out one of these for every work period.

Forms that are specific the particular unit leader position that you are training for will be discussed in your unit leader course.

Ink pens - always carry several, one may get wet, someone's always wanting one, and when you need one you want to be sure you have one.

Pencils - again always carry several,

Pads of paper - every position will need to be making notes at some time.

Marking pens - depending on the incident you are going to, you may be writing on large sheets of paper, a white board, or some sort of clear mylar plastic.

Carbon paper - when you first arrive at the incident you may not have a copy machine. A package of 12-24 sheets of carbon paper does not weigh much and can be very useful in the first planning period.

Stapler - You will always have to put a few sheets of paper together

Staple puller - For those invariable times you'll need to pull apart those papers you stapled together.

Paper clips - For when you want papers held together, but know they'll need to be taken apart again.

Rubber bands - work for keeping non-paper items together.

Tape - a roll of clear tape and a roll of masking tape will help with putting things together and in posting information.

Sticky notes – a small supply of the sticky note pads can be very valuable for quick updates in planning.

The important idea is that you arrive with the supplies needed to do your job for 24 to 48 hours, on the assumption that in this amount of time you will be able to obtain more supplies.

5. List 7 information items you should obtain from your dispatch office upon receiving an assignment.

Intended Answer: Any 7 of the following:

Position assignment,

Resource Order number,

Request number,

Incident name,

Reporting time,

Reporting location,

Contact phone number(s),

Financial charge code,

Travel arrangements

6. a. From whom should you receive your initial briefing when you arrive at an incident as a unit leader?

Intended Answer:

Planning Section Chief

b. List 8 items that you should obtain in your initial briefing after your arrival at an incident.

Intended Answer: Any 8 of the following:

Current situation assessment

Incident size/complexity/potential

Number of resources by agency and kind

Identification of specific job responsibilities expected of you

Identification of co-workers within your job function

Location of work area.

Identification of eating and sleeping arrangements

Procedural instructions for obtaining additional supplies, services, and personnel

Identification of operational period work shifts

Clarification of any important points pertaining to assignments that may be questionable

Provisions for specific debriefing at the end of an operational period

Unit Specific Information

Information to be solicited from incident resources for tracking purposes (RESL)

Review ICS 201, Incident Briefing, if available (RESL/SITL)

Project complexity of demobilization effort (DMOB)

Local agency contact for demobilization plan review (DMOB)

Requirements for unique or specific considerations to be included in demobilization plan (DMOB)

7. List 8 items related to your role as a unit leader in providing leadership and management and tell why they are important.

Intended Answer: Any 8 of the following:

Delegate - Make sure the people working for your unit know what you expect of them.

EEO Laws - Federal incident management system has a zero tolerance policy related to discrimination and/or harassment. When a problem is brought to your attention you must act.

Timelines - know the planning cycle clock and set the unit's schedule to meet its and the other units' timelines. It is important that assignments are completed in a timely manner. A delay in your unit can have repercussions throughout the entire planning section and in turn throughout the incident.

Help other units - when time permits help other units meet their objectives. It will also provide personnel experience in other aspects of the planning section.

Be flexible - Problems and situations will arise which you had not planned and are not prepared for, expect the unexpected.

Conduct yourself in a professional and friendly manner - You are representing the team and your agency.

Positive interpersonal and interagency work relationships - Agencies have different values and policies that can affect the operations. Differences should be discussed and resolved in a manner that fosters continued positive working relationships.

Employee welfare - Insure subordinates are getting adequate rest and meals are provided

Safety - Safety is always a number one priority. Accidents can happen in camp.

8. List 4 items that are part of your unit's responsibility in demobilization.

Intended Answer:

Unit's personnel; your unit's supplies, materials and equipment; organizing the unit's documentation; and supplying the needs of any replacement personnel who might be arriving to take over the incident.

9. List the 2 main information items that are most important when you are demobilizing an individual from your unit who is interested in receiving a reassignment.

Intended Answer:

How many continuous days the individual has been working on fire assignments away from their home unit.

A list of all ICS qualifications for the person.