



HOLLY ENERGY PARTNERS

Planning Section ICS Job Aid

4th Edition
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CONTINGENCIE

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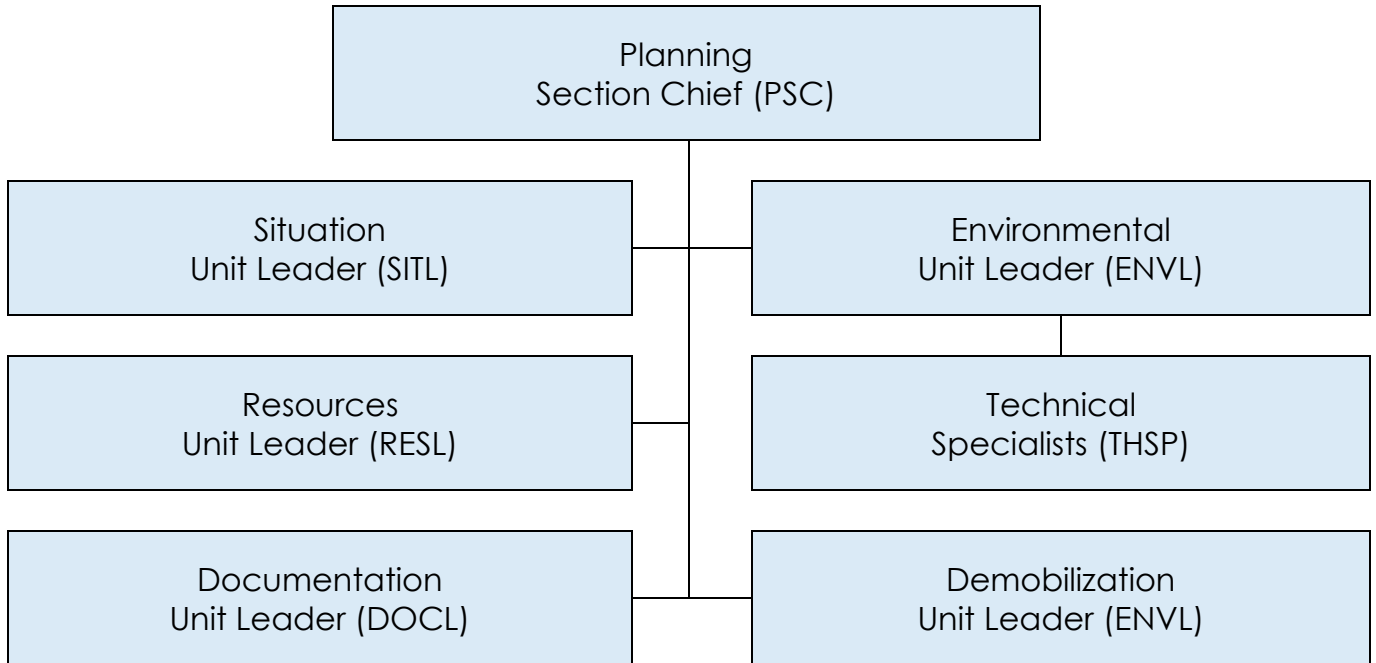
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ICS Organizational Chart



Overview

Planning Section Chief (PSC): Coordinates response planning and monitoring, including development of the Incident Action Plan (IAP); oversees the collection, evaluation, dissemination, and use of incident information; and maintains status of assigned and demobilized resources.

Situation Unit Leader (SITL): Responsible for collecting, organizing, evaluating, and displaying information about the current and possible future status of incident operations.

Resources Unit Leader (RESL): Maintains the master list and status of all personnel and equipment resources (both primary and support) assigned to the incident.

Documentation Unit Leader (DOCL): Responsible for maintaining accurate, up-to-date incident information which is critical to post-incident analysis.

Environmental Unit Leader (ENVL): Responsible for environmental matters associated with the response, including strategic assessment, modeling, surveillance, and environmental monitoring/permitting.

Demobilization Unit Leader (DMOB): Develops the Incident Demobilization Plan, ensuring the orderly, safe, and cost-effective demobilization of equipment and personnel.

Tasks & Responsibilities

- Check-in at the designated reception area in the Incident Command Post (ICP).

Note: Personnel Check-in List (ICS-211p) is typically used to facilitate the check-in process. This form includes entries relating to each individual's name, affiliation (agency/organization), telephone number, and email address, and may be expanded to include job qualifications, hotel/transportation arrangements, etc.

- Obtain incident credentials/badges during check-in, as warranted.
- Receive assignment instructions.
- Review and sign the Site Safety & Health Plan (ICS-208), indicating your awareness and understanding.

Note: As a member of the Command and General Staff, it is critical that you understand potential hazards and mitigation strategies associated with the incident. Although you may only be subject to a few of these hazards, knowledge can be the difference between zero accidents and preventable injuries.

- Acquire background knowledge on the incident prior to starting your assignment. Obtain and review a copy of the Incident Briefing (ICS-201) forms, if available, which convey basic information regarding the incident and serve as the Incident Action Plan (IAP) during the early stages of the response.
- Establish a work location inside the Incident Command Post (ICP), in close proximity to the Operations Section.
- Acquire necessary work materials and supplies, including photocopiers and large-format poster printers.
- Don the appropriate (color-coded) ICS position-specific vest for ease of identification in the Incident Command Post (ICP).

Note: The Planning Section is typically represented by the color blue.

- Initiate a log of actions, decisions, events, and conversations, using Section/Unit Activity Log (ICS-214) (page 139) or Individual Activity Log (ICS-214a) (page 140).
- Review the Incident Management Handbook (IMH), ICS job aids, standard operating procedures (SOPs), company spill plans, regional/local emergency plans, and other relevant documentation.

Tasks & Responsibilities (Cont'd)

- Meet with the Incident Commander (IC) to receive further clarification on tasks, responsibilities, and expectations:
 - incident situation (magnitude and potential).
 - incident objectives and priorities.
 - response emphasis.
 - command structure (single or unified).
 - agencies and jurisdictions involved.
 - incident facilities already established, if any.
 - locations of pre-established check-in stations.
 - information on committed resources, along with resources ordered.
 - length of the operational period, plus operational period start time.
 - resource request process.
 - news media interest.
 - political, environmental, and economic limitations/constraints, if any.

- Design the layout for the Incident Command Post (ICP), with cooperation from the Logistics Section Chief (LSC), if assigned. Arrange furniture, computer terminals, telephones, fax machines, flip charts, video projection displays, and other resources to create efficient work spaces for the respective ICS functions.

- Outfit the Incident Command Post (ICP) with the necessary reference materials and supplies, including copies of the OPA '90 Spill Response Plan, Emergency Response Action Plan (ERAP), Area Contingency Plan (ACP), Geographic Response Plan (GRP), operating manuals, maps, facility/pipeline diagrams, status boards, ICS forms, telephone directories, etc.

- Begin to compile the Incident Briefing (ICS-201) forms (pages 127-130), which typically serve as the Incident Action Plan (IAP) during the early stages of the response effort.

- Make recommendations concerning initial priorities, strategic goals, and tactical objectives, together with the Incident Commander (IC), Safety Officer (SOFR), and Operations Section Chief (OSC).

- Reference the OPA '90 Spill Response Plan, Area Contingency Plan (ACP), and Geographic Response Plan (GRP) to ascertain what measures may need to be taken to protect sensitive areas, e.g., wetland environments, critical wildlife habitats, public recreational areas, water intakes, etc., at risk of potential contamination. Communicate priorities to the Incident Commander (IC) and Operations Section Chief (OSC).

Tasks & Responsibilities (Cont'd)

- Institute an Operational Period Planning Cycle (Planning "P") and outline a daily meetings schedule. Post a copy of Meeting Schedule (ICS-230) (page 138) on the Situation Display.

Note: During the initial response phase, an Incident Briefing and Initial Unified Command Meeting should generally convene prior to transitioning into a formal planning cycle. Ahead of these meetings, frequent informal briefings (every 2 to 4 hours) may be necessary to keep the Incident Management Team (IMT) informed of the current incident situation.

- Draft a list of preliminary incident objectives, using Incident Objectives (ICS-202) (page 132) as a template, for review and consideration during the Initial Unified Command Meeting (and subsequent Unified Command Objectives Meetings). Amend the generalized objectives on the Summary of Current Actions (ICS-201-2) form to reflect the exact needs of the incident.
- As the initial response escalates, determine the number of personnel required to adequately staff planning-related functions, potentially including:
 - Situation Unit Leader (SITL).
 - Resources Unit Leader (RESL).
 - Documentation Unit Leader (DOCL).
 - Environmental Unit Leader (ENVL).
 - Technical Specialists (THSP).
 - Demobilization Unit Leader (DMOB).
- Monitor ongoing response efforts and update incident-related information on maps and status boards in the Incident Command Post (ICP), by designating a Situation Unit Leader (SITL), as necessary (refer to pages 12-25).
- Delegate a Resources Unit Leader (RESL) to maintain the master roster of incident-assigned equipment and personnel resources, in response to complex scenarios involving significant assets (refer to pages 26-40).
- Establish check-in functions (and assign Check-in Recorders) to regulate access at the various incident facilities, including the Incident Command Post (ICP), Staging Area, etc.
- Assign Field Observers (FOBS) to collect spill-related information through personal observations at the incident site.

Tasks & Responsibilities (Cont'd)

- Start a formal documentation process. Elect a Documentation Unit Leader (DOCL) to collect, organize, store, and disseminate incident files and documentation for ready reference, analytical, legal, and historical purposes (refer to pages 41-58).

- Appoint an Environmental Unit Leader (ENVL) (refer to pages 59-66) and Technical Specialists (THSP), as necessary, to analyze/resolve issues relating to:
 - oil fate and effects.
 - spill trajectory analysis.
 - sensitive area protection.
 - resources at risk (RAR).
 - waste management.
 - submerged oil detection and recovery.
 - site/shoreline cleanup.
 - wildlife rescue and rehabilitation.
 - equipment decontamination.
 - natural resource damage assessment (NRDA).
 - air monitoring.
 - soil/water sampling.
 - in-situ burning, etc.

- Meet with the Operations Section Chief (OSC) to examine current response strategies, hence propose any additional plans/strategies ("how") and tactics ("who", "what", "when", and "where") to mitigate the discharge, using Work Analysis Matrix (ICS-234) (page 135) as a documentation tool.

- Participate in (and facilitate) the Tactics Meeting. Begin to fill out a draft Operational Planning Worksheet (ICS-215) (page 136), together with the Operations Section Chief (OSC) and Logistics Section Chief (LSC).

Note: Operational Planning Worksheet (ICS-215) should be used to analyze and identify potential shortfalls in equipment on-hand. Operations and Planning staff should hence re-define planning efforts and priorities to match available resources, if existing resources are incapable of supporting proposed strategies and tactics.

Tasks & Responsibilities (Cont'd)

- Lead the discussion on resources during the Planning Meeting, using Operational Planning Worksheet (ICS-215) as a reference. Provide input to ensure sufficient resources are available to implement the Incident Action Plan (IAP).

Note: Upon conclusion of the Planning Meeting, the Logistics Section/Supply Unit should be provided with a copy of Operational Planning Worksheet (ICS-215) to prepare resource orders for the next operational period.

- Work with Operations staff to prepare Assignment Lists (ICS-204) (page 137), outlining the tasks and responsibilities of field personnel, for incorporation into the Incident Action Plan (IAP).

Note: The Environmental Unit Leader (ENVL) is responsible for incorporating a site-specific summary of environmental concerns (for each task or worksite) into the daily action plan. The Safety Officer (SOFR) should also be tasked with addressing unique site safety and health concerns on the respective ICS-204 forms.

- Facilitate planning meetings and situational briefings. Ensure meetings and briefings are focused and timely, while accomplishing the necessary objectives. Orchestrate meetings/briefings to optimize the valuable time of the Incident Commander (IC)/Unified Command and Operations Section Chief (OSC).
- Set up meeting rooms with tables, chairs, maps/diagrams, status boards, easels, microphones, podiums, projectors, screens, speaker/conference phones, etc.
- Assign an individual to take minutes at the respective daily meetings and briefings. Capture the names of those individuals in attendance, accompanied by discussion topics, using Meeting Summary (ICS-231) (page 53).

Tasks & Responsibilities (Cont'd)

- Begin each formal meeting/briefing by conducting an attendee roll call, briefly reviewing the agenda, and communicating ground rules (refer to the examples below):
 - Silence all electronic devices.
 - Respect the meeting agenda.
 - Be mindful of time constraints.
 - Presenters front and center.
 - Limit interruptions and side conversations.
 - Table discussions unrelated to the meeting/briefing.

Note: Each meeting in the ICS planning process is conducted for a specific purpose. The agendas vary from meeting to meeting (pages 75-126).

- Establish (and maintain) a list of action items for members of the ICS organization, using Open Action Tracker (ICS-233) (page 54).

Note: Open Action Tracker (ICS-233) serves as an optimal means to capture tasking from the Incident Commander (IC)/Unified Command. The list ensures accountability, allowing the Planning Section Chief (PSC) to monitor progress towards completion. The form is typically reviewed and updated during each scheduled meeting/briefing as part of the Operational Period Planning Cycle.

- Supervise preparation of the Incident Action Plan (IAP), outlining work activities and task assignments for the next operational period, in response to complex incidents.

Note: A unique Incident Action Plan (IAP) must be prepared for each operational period. The first IAP typically takes the longest time to prepare.

- Frequently remind individuals about submittal deadlines and proactively seek out information, e.g., forms, reports, maps, etc., that is needed from other ICS sections/units for incorporation into the Incident Action Plan (IAP).
- Assemble the appropriate forms and reports into the Incident Action Plan (IAP). Be careful not to incorporate too much information into the IAP; keep it as brief as possible.
- Attach a cover sheet (ICS-200) and forward a completed draft of the Incident Action Plan (IAP) to the Incident Commander (IC) for presentation to the Unified Command.

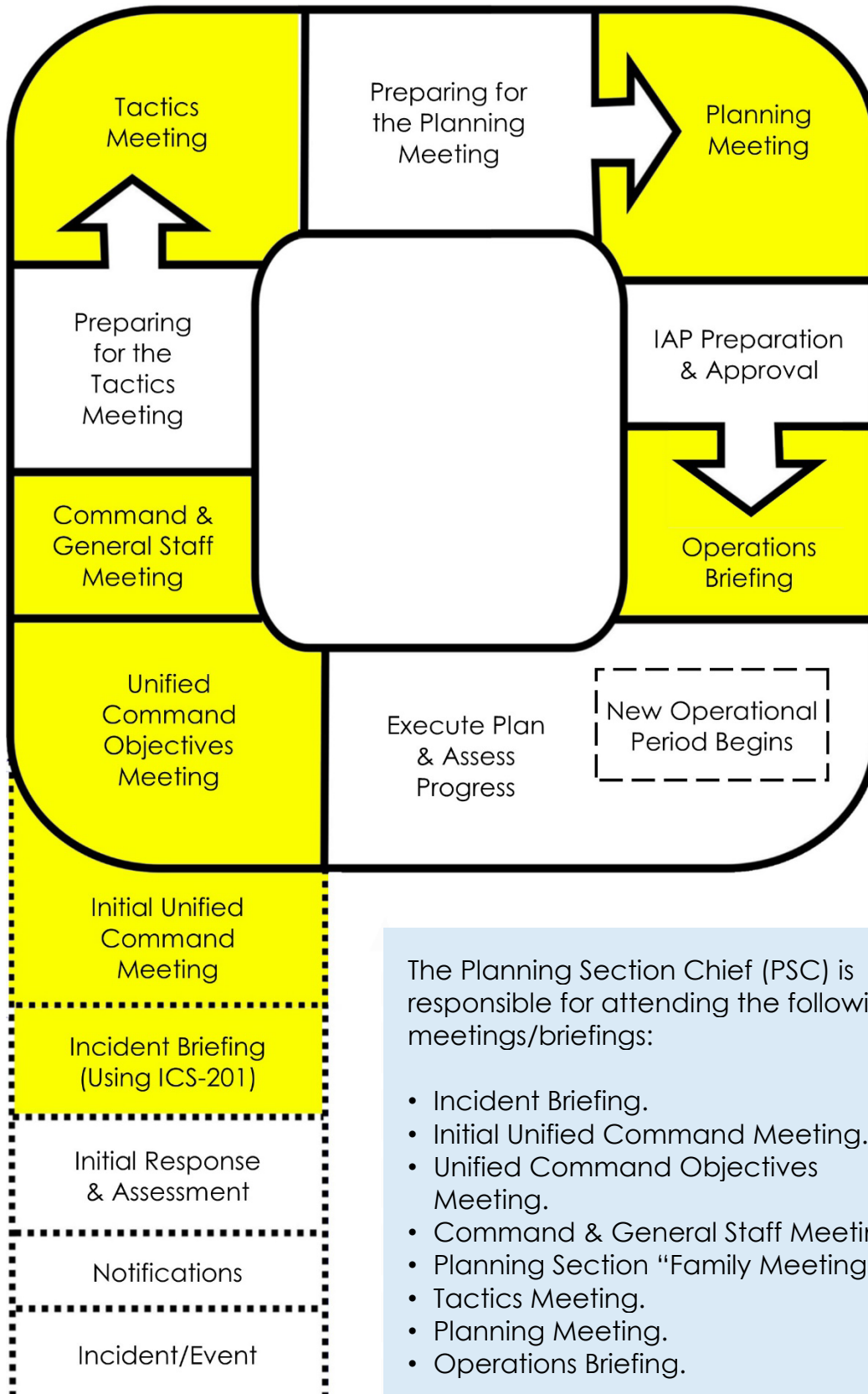
Tasks & Responsibilities (Cont'd)

- Maintain a distribution list of individuals/ICS functions who should receive a copy of the Incident Action Plan (IAP).
- Interface with government authorities, contractors, and field supervisors to ensure the Incident Action Plan (IAP) and other operational plans are implemented in a coordinated manner.
- Initiate response planning for extended operations. Analyze future projections of incident growth.
- Periodically brief the Incident Commander (IC) on any problems, recommendations, outstanding issues, follow-up requirements, etc.
- Ultimately develop criteria to systematically demobilize personnel and equipment and terminate cleanup efforts.

Note: A Demobilization Unit Leader (DMOB) may be assigned to orchestrate the effective and orderly demobilization of equipment and personnel resources (refer to pages 67-74).

- Complete a daily log of actions, decisions, events, and conversations, using either Section/Unit Activity Log (ICS-214) (page 139) or Individual Activity Log (ICS-214a) (page 140). File all completed log sheets with the Documentation Unit (DOCL).

Meetings & Briefings



The Planning Section Chief (PSC) is responsible for attending the following meetings/briefings:

- Incident Briefing.
- Initial Unified Command Meeting.
- Unified Command Objectives Meeting.
- Command & General Staff Meeting.
- Planning Section “Family Meeting”.
- Tactics Meeting.
- Planning Meeting.
- Operations Briefing.

Situation Unit Leader (SITL)

Tasks & Responsibilities

- Begin to collect, organize, evaluate, and display information regarding both the current and forecasted status of incident operations.
- Arrange for a briefing from the Planning Section Chief (PSC), in sufficient detail to develop an accurate picture of the existing situation, addressing such items as:
 - current operations.
 - incident objectives.
 - locations of incident facilities.
 - establishment of any Divisions, Groups, and Branches.
 - weather information.
 - meeting schedule.
 - incident potential.
- Establish a work location in the Incident Command Post (ICP) that is:
 - characterized by sufficient work space.
 - accessible, yet also isolated from heavy foot traffic.
 - convenient to Operations and Planning functions.
 - situated next to the Resources Unit (RESL).
 - suitable for the projection of wall displays.
- Prepare a highly-visible Situation Display (refer to pages 18-20) near the entry of the Incident Command Post (ICP), using status boards, maps, diagrams, etc. to keep members of the ICS organization informed of ongoing activities.

Note: The Situation Display should be the one place in the ICP where anyone can go, at any time, to learn about the nature of the incident and status of response operations. The display, which may incorporate a combination of hard-copy and digital displays, should provide a quick "snapshot" of the incident, incorporating the most complete and accurate information currently available.

- During the emergency/reactive phase, prominently feature the Incident Briefing (ICS-201) forms, among others, on the Situation Display. Include:
 - General Incident Report.
 - Spill Notification Log.
 - Map/Sketch (ICS-201-1).
 - Summary of Current Actions (ICS-201-2).
 - Current Organization (ICS-201-3).
 - Resources Summary (ICS-201-4).
 - Meeting Summary (ICS-230).
 - Open Action Tracker (ICS-233).

Situation Unit Leader (SITL)

Tasks & Responsibilities (Cont'd)

- As the incident potentially escalates and transitions into the proactive phase, incorporate poster-size enlargements of several additional ICS forms into the Situation Display, including:
 - Incident Objectives (ICS-202).
 - Organization Assignment List (ICS-203).
 - Incident Organization Chart (ICS-207).
 - Incident Status Summary (ICS-209).
 - Meeting Schedule (ICS-230).
 - Resources at Risk Summary (ICS-232).
 - Open Action Tracker (ICS-233).
- Display status boards in a neat, legible, and ordered fashion (logical left-to-right viewing sequence) to ensure they impart an integrated and coherent message concerning the incident. Strive for a high-quality presentation that projects an accurate “visual story” of what is happening on the incident.
- Incorporate various mapping products, e.g., facility/pipeline diagrams, street maps, topographical maps, nautical charts, aerial photographs, etc., of the receiving environment into the Situation Display. Use mylar/laminated overlays and dry-erase markers to make notations on the maps.

Note: The “master” Situation Map should depict the location of the spill plume, contaminated shorelines, deployed equipment and personnel resources, sensitive areas, wildlife impacts, command post, staging areas, medical first-aid stations, interim waste storage areas, decontamination areas, helipads, Division/Group boundaries, etc. The finished map should meet the “STAND” principle (Scale, Title, Author, North Arrow, Date & Time). A symbol legend, incorporating commonly used ICS map symbols, must also be provided.

- Integrate a “Story Board” into the Situation Display, featuring:
 - weather/marine forecasts.
 - spill plume trajectories.
 - tide/tidal current predictions.
 - river stage reports.
 - daily sunrise/sunset times.
 - moon phases.
 - notification summaries.
 - Pollution Reports (POLREPs).
 - Situation Reports (SITREPs).
 - media releases, etc.

Situation Unit Leader (SITL)

Tasks & Responsibilities (Cont'd)

- Compile information relating to the type and amount of spilled oil, oil recovery volumes, mass balance calculations, shoreline impacts, wildlife casualties, personnel injuries, assigned equipment and personnel resources, generated wastes, forecasted weather/marine conditions, etc. onto Incident Status Summary (ICS-209) (pages 21-23).

Note: Incident Status Summary (ICS-209) serves as a "snapshot" of current (and forecasted) response operations. The ledger supports incident decision-making and may be used by members of the Command and General Staff to formulate strategies and allocate resources. The form also serves as a key reference as the Public Information Officer (PIO) prepares media releases.
- Establish duplicate "satellite" displays for the Joint Information Center (JIC), Unified Command meeting room, primary meeting space, VIP reception area, check-in stations, break rooms, etc., as appropriate.
- Place an inbox near the Situation Display to help manage the flow of information, receiving such items as:
 - various ICS forms and technical reports.
 - photographs.
 - spill trajectories.
 - media releases.
 - Field Observer (FOBS) reports.
 - Pollution Reports (POPREPs), etc.
- Similarly, maintain an outbox near the Situation Display to distribute:
 - Situation Reports (SITREPs).
 - Incident Status Summaries (ICS-209).
 - maps/charts.
 - meeting schedules.
 - weather forecasts.
 - river/streamflow graphs.
 - other historical data.
- Verify, synthesize, and analyze data as it is received. Hence convert data into usable information for incident personnel.
- Post/disseminate information in a timely manner. Date/time-stamp maps, charts, ICS forms, etc. to reflect the most recent updates.

Situation Unit Leader (SITL)

Tasks & Responsibilities (Cont'd)

- Manage the schedule for collecting and disseminating information, designed to meet end user requirements, e.g., planning meetings, operational briefings, media briefings, town hall meetings, etc.
- Staff the Situation Unit with various assistants, based on the magnitude and complexity of the incident, intensity of operations, potential incident duration, and information demand:
 - Display Processor (DPRO).
 - Field Observers (FOBS).
 - Situation Report (SITREP) Writer.
 - Geographic Information System (GIS) Specialist.
 - Weather Forecasting Specialist.
 - Trajectory Forecasting Specialist.
- Appoint a dedicated Display Processor (DPRO) to maintain and post information on the Situation Display and manage the Common Operating Picture (COP), if the incident is characterized by five (5) or more Divisions/Groups.
- Assign Field Observers (FOBS) to collect spill-related information through personal observations at the incident site. Issue protocols and post schedules for the timely reporting of data. Instruct FOBS to communicate situational status updates (via radio or cell phone) to the Incident Command Post (ICP) at 30- to 60-minute intervals during the dynamic initial response phase, then at less frequent intervals as the incident transitions into the “managed” phase.

Note: Field Observers (FOBS) serve as the “eyes and ears” of the Situation Unit. They should be provided with base maps, digital/video cameras, and handheld GPS devices to confirm/document incident perimeters, spill plume trajectories, contaminated environments, resource assignments, operational progress, weather conditions, safety hazards, natural resource damages, wildlife impacts, personnel injuries/accidents, potential damage claims, etc. As a rule of thumb, each operational Division should have an assigned FOBS.
- Summarize daily activities in a written Situation Report (SITREP) in support of operational planning and the preparation of media releases.
- Produce specialized maps, charts, and overlay imagery, using a combination of paper and virtual sources, with help from Geographic Information System (GIS) specialists. Establish methods to capture map/chart data for historical purposes, e.g., photographs, file back-ups, etc.

Tasks & Responsibilities (Cont'd)

- Support the response by establishing a Common Operating Picture (COP), using a crisis/incident management (C/IM) platform or Geographic Information System (GIS)-based software program such as NOAA's Environmental Response Mapping Application (ERMA) or HEP Map, to provide a single source of data and information for situational awareness, coordination, communication, and data archival.

Note: ERMA, developed by the National Oceanic & Atmospheric Administration (NOAA) and University of New Hampshire (UNH), is a web-based GIS tool capable of integrating and overlaying data relating to the location and trajectory of the spill plume, contaminated shorelines, affected wildlife populations, etc. The software application can also incorporate geo-tagged photographs, SCAT reports, etc. and provide near real-time tracking of requested, staged, deployed, and demobilized resources.

- Develop the Information Management Plan (ICS-240) to track Critical Information Requirements (CIRs) during the incident, as required, in coordination with the Public Information Officer (PIO), Liaison Officer (LOFR), Operations Section Chief (OSC), Planning Section Chief (PSC), Logistics Section Chief (LSC), and Communications Unit Leader (COML).
- Issue periodic "Flash/Spot Reports" to communicate high priority items, critical information requirements (CIRs), significant updates, urgent notifications, etc.

Note: Examples of CIRs include:

- *injuries and/or fatalities.*
- *personnel accountability.*
- *waterway/port closures.*
- *damage to infrastructure or company facilities.*
- *equipment malfunctions.*
- *total volume of the spill or rate of discharge.*
- *resources status.*
- *operational asset tracking.*
- *environmental impacts.*
- *resources at risk.*
- *oiled wildlife.*
- *cultural/historical impacts.*
- *media interests and concerns.*
- *social media trends.*
- *political/stakeholder concerns, etc.*

Situation Unit Leader (SITL)

Tasks & Responsibilities (Cont'd)

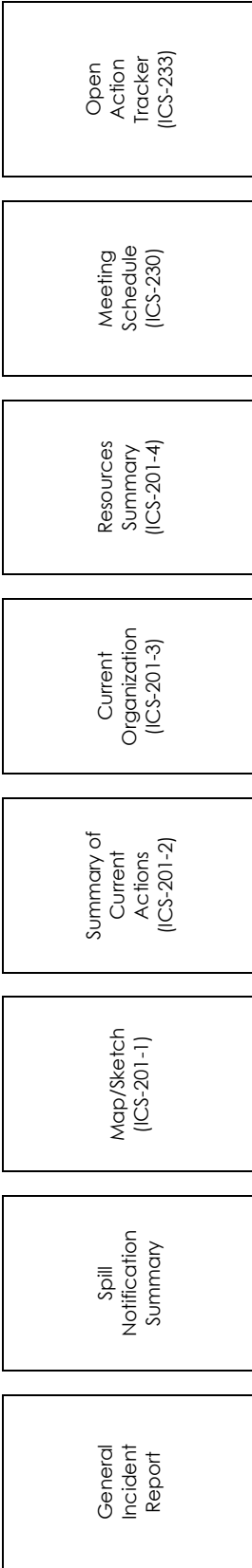
- Analyze future projections of incident growth, along with other incident-specific predictions, as requested by the Planning Section Chief (PSC). Predict future status based on weather, the anticipated impact of mitigation strategies, and other variables.

Note: Such predictions will enable the Incident Commander (IC)/Unified Command to formulate achievable objectives that guide the direction and priorities of the response.

- Deliver focused, clear, concise, and relevant briefings at the Command & General Staff Meeting, Tactics Meeting, Planning Meeting, and Operations Briefing. Provide a brief (less than 3-minute) synopsis of the current/projected incident situation, highlighting recent progress and accomplishments, using the Situation Map and Incident Status Summary (ICS-209) as references. Ensure words and graphics “paint” an accurate picture of the current incident situation, plus offer a glimpse into future status.
- Set up meeting rooms with tables, chairs, maps/diagrams, status boards, easels, microphones, podiums, projectors, screens, etc., with help from the Documentation Unit Leader (DOCL).
- Provide various products in support of the Incident Action Plan (ICP), including incident maps/charts, Division/Group-specific maps, weather forecasts, river stage reports, tide predictions, oil spill trajectory models, and other technical data.
- Complete a daily log of actions, decisions, events, and conversations, using either Section/Unit Activity Log (ICS-214) (page 139) or Individual Activity Log (ICS-214a) (page 140). File all completed log sheets with the Documentation Unit (DOCL).

Situation Unit Leader (SITL)

Example Situation Display



Example Situation Display (Cont'd)

<p><u>"Story Board"</u> Notification Logs, Weather Forecasts, Sunrise/Sunset Times Moon Phases, Spill Trajectories, Media Releases, Situation Reports (SITREPS), Pollution Reports (POLREPS), Photographs</p>	<p>Map/Sketch (ICS-201-1)</p>	<p>Summary of Current Actions (ICS-201-2)</p>	<p>Current Organization (ICS-201-3)</p>
<p>Meeting Schedule (ICS-230)</p>		<p>Resources Summary (ICS-201-4)</p>	<p>Open Action Tracker (ICS-233)</p>

Situation Unit Leader (SITL)

Example Situation Display (Cont'd)

<p>Incident Objectives (ICS-202)</p>	<p>Incident Status Summary (ICS-209) (page 1)</p>	<p>Incident Status Summary (ICS-209) (page 2)</p>	<p>Incident Status Summary (ICS-209) (page 3)</p>
<p>Situation Map</p>			
<p>Incident Organization Chart (ICS-207)</p>			
<p>Meeting Schedule (ICS-230)</p>			
<p>Resources at Risk Summary (ICS-232)</p>			
<p>Open Action Tracker (ICS-233)</p>			

"Story Board"

- Notification Logs,
- Weather Forecasts,
- Sunrise/Sunset Times
- Moon Phases,
- Spill Trajectories,
- Media Releases,
- Situation Reports (SITREPS),
- Pollution Reports (POLREPS),
- Photographs

Situation Unit Leader (SITL)

Incident Status Summary (ICS-209)

Incident Name:	Operational Period (start):	Operational Period (end):
Spill Status:		
Volume of spill (gals):		Source controlled (yes/no):
Discharge rate (gals/hr):		Remaining potential (gals):
Mass Balance/Oil Budget (estimated):		
Disposition	Since last report	Total
Recovered Oil		
Evaporated		
Naturally Dispersed		
Chemically Dispersed		
Burned		
Floating, Contained		
Floating, Uncontained		
Onshore		
Submerged		
Total spilled oil accounted for		
Personnel Safety:		
Injuries	Since last report	Total
Responders		
Public		
Volunteer		
Other		
Weather & Meteorological Conditions:		
Parameter	Ambient	Forecasted
Air Temperature (°F)		
Wind Direction/Speed (mph)		
Visibility/Cloud Cover		
Precipitation Type/%		
Water Temperature (°F)		
High Tide (time/height)		
Low Tide (time/height)		
Streamflow Rates (cfs)		
River Stage (height, ft)		
Sunrise/Sunset (time)		
Moon Phase		

Situation Unit Leader (SITL)

Incident Status Summary (ICS-209) (Cont'd)

Shoreline Contamination (estimated, miles/acres):					
Degree of Oiling	Affected	Cleaned	Remaining		
Light					
Medium					
Heavy					
Total					
Comments:					
Waste Management (estimated):					
Type of Waste	Recovered	Stored	Disposed		
Oil (gals)					
Oily Liquids (gals)					
Total Liquids (gals)					
Oily Solids (tons)					
Total Solids (tons)					
Comments:					
Wildlife Casualties:					
Type	Captured	Cleaned	Released	DOA	Euthanized
Birds					
Mammals					
Reptiles					
Fish					
Other					
Total					
Comments:					

Situation Unit Leader (SITL)

Incident Status Summary (ICS-209) (Cont'd)

Equipment Resources:				
Type	Ordered	Assigned	Available	Out-of-service

Personnel Resources:			
Affiliation	Command Post	Field	Total
Responsible Party (RP)			
Federal			
State			
Local			
Contractors			
Volunteers			
Other			
Total			

Prepared By (PSC/SITL):	ICS Position/Assignment:	Preparation Date/Time:
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Situation Unit Leader (SITL)

ICS Forms & Reports

Incident
Status
Summary
(ICS-209)

Resources
Request
(ICS-213-RR)

Section/Unit
Activity Log
(ICS-214)

Individual
Activity Log
(ICS-214a)

Information
Management
Plan
(ICS-240)

Situation
Reports
(SITREPs)

Incident
Maps/Charts

Weather
Forecasts

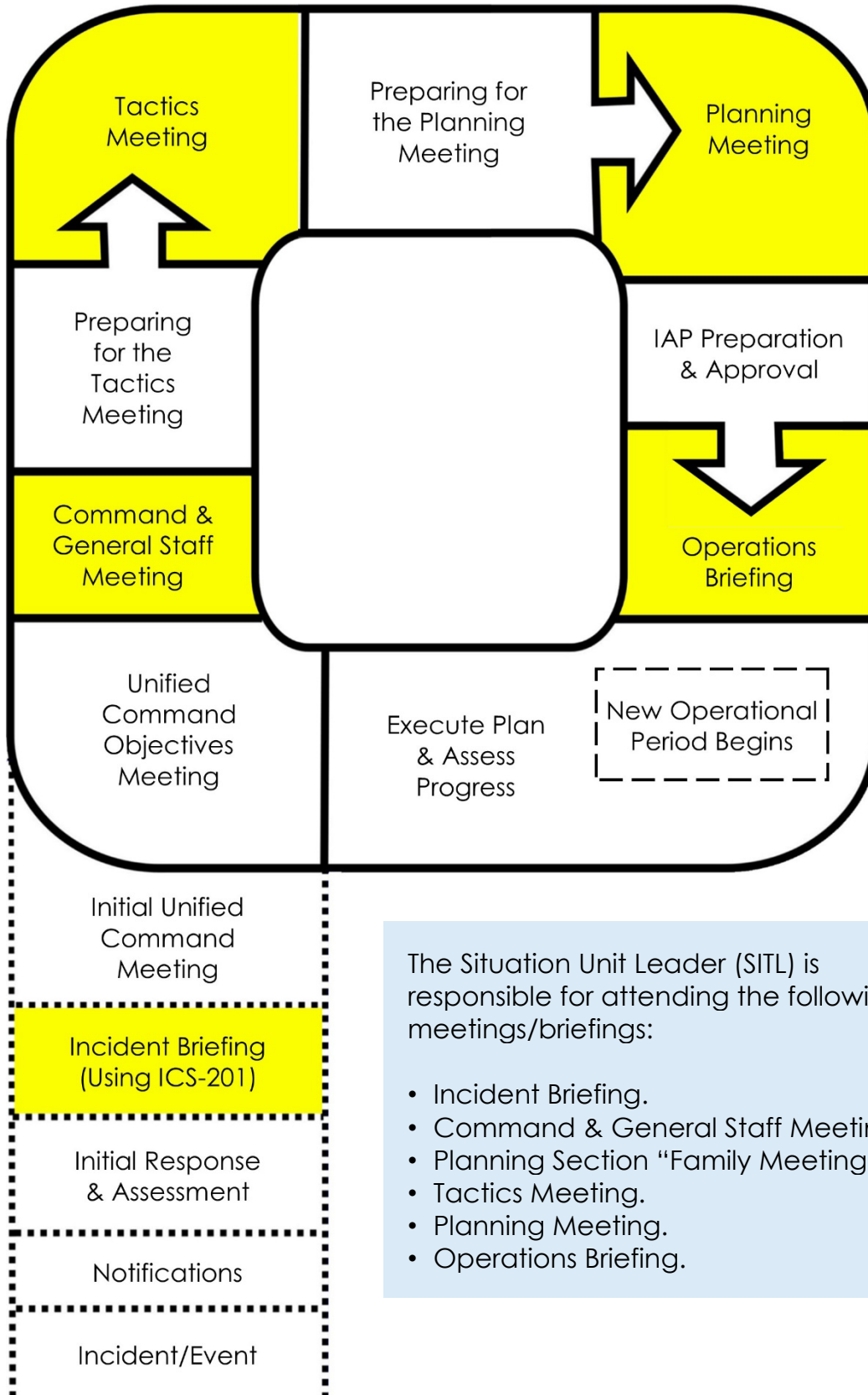
Spill
Trajectory
Forecasts

River/Stream
Reports

Tide
Predictions

Situation Unit Leader (SITL)

Meetings & Briefings



The Situation Unit Leader (SITL) is responsible for attending the following meetings/briefings:

- Incident Briefing.
- Command & General Staff Meeting.
- Planning Section "Family Meeting".
- Tactics Meeting.
- Planning Meeting.
- Operations Briefing.

Tasks & Responsibilities

- Compile a master roster and track the status of all equipment and personnel resources committed to incident operations. Track resources from the time they arrive/check-in until they are properly demobilized.
- Acquire a briefing from the Planning Section Chief (PSC):
 - incident situation.
 - incident objectives.
 - resources currently on-scene, along with their assignment.
 - resources ordered/enroute.
 - locations of any established check-in locations.
 - agencies and jurisdictions involved.
 - resource request process.
- Establish an adequate workspace in the Incident Command Post (ICP), sufficiently large enough to display a current and accurate “picture” of incident resources (keeping in mind there may be hundreds of resources that need to be tracked and displayed).
- Assume ownership of Resources Summary (ICS-201-4), if available, during the initial response phase.
- Quickly obtain an accurate “picture” of what resources are both on-scene and enroute, which can be especially difficult during the early hours/days of a response.

Note: From the moment the Resources Unit (RESL) is established, it's essentially a race to catch up. It can be extremely challenging to determine what resources have arrived on-scene during the “initial wave”, before a check-in function is officially established, unless the Incident Commander (IC) and/or Operations Section Chief (OSC) did an excellent job of documentation. It can also be difficult to gain cooperation from responding resources to properly check-in at the incident.

- Initially rely upon key members of the ICS organization to help support the burdensome task of resource tracking. Receive updates from Staging Area Managers (STAM), Division/Group Supervisors (DIVS), and OSRO representatives on the arrival and departure times of resources in the field.

Tasks & Responsibilities (Cont'd)

- Arrange for staffing of the Resources Unit (RESL), which may include Check-in Recorders (CHKN) and Status Recorders.

Note: On a relatively small incident, the Planning Section Chief (PSC) or Resources Unit Leader (RESL) may be able to perform all of the Unit's duties, with only minimal support. However, in large/complex incidents, the RESL requires substantial support, especially during the early stages of a response, when large numbers of resources are reporting to the incident.

- Assign Check-in Recorders (CHKN) to properly account for/check-in resources as they arrive on-scene. Provide CHKNs with Equipment Check-in Lists (ICS-211e) (page 36) and Personnel Check-in Lists (ICS-211p) (page 37) to log both equipment and personnel reporting to the incident.

Note: Resource status updates should be communicated at 15- to 30-minute intervals during the initial buildup and on a semi-daily basis (preferably in advance of daily planning meetings and operational briefings) as the response evolves into the post-emergency/proactive phase.

- Employ check-in functions at the respective incident facilities and operational worksites, e.g., Incident Command Post (ICP), staging areas, boat ramps, decontamination stations, medical first-aid stations, etc. Post highly-visible signs at the respective check-in stations.

Note: As the response shifts from the emergency/reactive mode to a proactive response, check-in should ideally occur at a reduced number of locations, primarily the Incident Command Post (ICP) and Staging Area(s).

- Continually review/refine the check-in process to address any gaps. Adopt a field verification process, as appropriate.

Tasks & Responsibilities (Cont'd)

- Prepare and maintain displays, charts, and lists that reflect the current status and location of tactical resources, response personnel, support equipment, marine vessels, transportation vehicles, airborne assets, etc. Display information using T-cards (ICS-219) (inserted into canvas/metal racks), magnetic panels, dry-erase boards, or a spreadsheet/database software program (recommended), which can be projected on an overhead screen. However, realize that for the vast majority of incidents, a spiral notebook or grease pencil on a vehicle's windshield may be all that's needed to track resources.

Note: While the effectiveness of a response is often visible in the maps and status boards maintained by the Situation Unit (SITL), the efficiency of a response is usually most visible in the Resources Unit display. A well-maintained and clearly organized T-card display (or electronic equivalent) allows spill managers to quickly evaluate the status and availability of equipment and personnel assets and identify potential deficiencies. Without accurate situational awareness of resources both on-scene and ordered, it is virtually impossible to effectively manage the response, especially during the hectic initial response phase, when significant numbers of personnel, equipment, and government agency representatives typically arrive within a short period of time.

- Delegate Status Recorders to assist with maintenance of the T-card display or key resource assignments and status changes into an electronic spreadsheet or database, based on the size/complexity of the incident, quantity and kind/type of resources, and number of divisions/groups.
- Protect resource displays from unwanted handling, while also recognizing the display must be positioned to allow for ready viewing by members of the ICS organization.
- Forge strong ties with Operations and Logistics Section personnel to ensure the latest resource status and allocation is displayed. Confirm Operations, Planning, and Logistics are all tracking resources in a similar manner, e.g., a skimmer is a skimmer.
- Frequently compare resource quantities/assignments to what is depicted on the Situation Map and Incident Status Summary (ICS-209).
- Assist with the formal process of ordering resources, by receiving carbon copies of submitted Resources Request (ICS-213-RR) forms (page 141) from requestors. Review the resources spreadsheet (or T-cards) to determine if requested "tactical" resources are currently available at the Incident Command Post (ICP), staging area, warehouse, central supply unit (CSU), etc.

Tasks & Responsibilities (Cont'd)

- Assign “tactical” resources, if on-scene and ready for deployment, but not committed to a particular task. Hence communicate resource status change information and assignment details to the appropriate Operations personnel, e.g., Section Chief, Branch Director, Division/Group Supervisor (DIVS), Staging Area Manager (STAM), etc.
- Forward unfulfilled requisition forms to the Logistics Section Chief (LSC)/Supply Unit (SPUL), if requested tactical resources are currently not available on-scene.
- Draft Organization Assignment List (ICS-203) (page 34) and Incident Organization Chart (ICS-207) (page 35) for inclusion in the Incident Action Plan (IAP).
- Provide input to the Planning Section Chief (PSC) to ensure adequate resources are available to implement the Incident Action Plan (IAP).
- Assist with preparation of Operational Planning Worksheet (ICS-215) (page 136).

Note: Operational Planning Worksheet (ICS-215) is used to determine resources required for each established work assignment relating to the next operational period. Reporting dates, times, and locations are also specified. Upon completion, the Logistics Section uses the form to order the necessary resources.

- Fill out Assignment Lists (ICS-204) (page 137), outlining tasks and responsibilities of field personnel during the next operational period, using Operational Planning Worksheet (ICS-215) as a guide.

Note: Assignment List (ICS-204) provides field personnel with detailed information on their specific work assignments. The form describes exactly what is to be done to address the incident objectives, e.g., by whom, how, when, where, and with what resources.

- Be prepared to help with discussions regarding resource commitments at the Tactics Meeting and Planning Meeting.

Tasks & Responsibilities (Cont'd)

- Assemble the various components of the Incident Action Plan (IAP). Submit the document to the Planning Section Chief (PSC) for presentation to the Unified Command.

Note: Suggested IAP contents include:

- *IAP Cover Sheet (ICS-200).*
- *Incident Objectives (ICS-202).*
- *Organization Assignment List (ICS-203).*
- *Assignment List (ICS-204) (multiple worksheets).*
- *Incident Radio Communications Plan (ICS-205).*
- *Communications List (ICS-205a).*
- *Medical Plan (ICS-206).*
- *Incident Organization Chart (ICS-207).*
- *Meeting Schedule (ICS-230).*
- *incident maps/charts.*
- *weather forecasts.*

Optional components include:

- *Command Direction (ICS-202a).*
- *Critical Information Requirements (ICS-202b).*
- *Site Safety & Health Plan (ICS-208).*
- *Air Operations Summary (ICS-220).*
- *Resources at Risk Summary (ICS-232).*
- *Waste Management Plan.*
- *Site/Shoreline Cleanup Plan.*
- *Equipment Decontamination Plan.*
- *Information Management Plan.*
- *Incident Traffic Plan.*
- *Vessel Routing Plan.*
- *Incident Demobilization Plan.*

- Submit a daily log of actions, decisions, events, and conversations, using either Section/Unit Activity Log (ICS-214) or Individual Activity Log (ICS-214a) (refer to pages 139-140), to the Documentation Unit.

Resource Typing

Kind	Type	Kind/Type	Description
B	1	B1	Skirted boom, height > 42 inches
B	2	B2	Skirted boom, height > 18 inches, < 42 inches
B	3	B3	Skirted boom, height < 18 inches
B	Fire	BFire	Fire boom
SK	1	SK1	Portable skimmer, > 9,600 bbls/day
SK	2	SK2	Portable skimmer, > 2,880 bbls/day, < 9,600 bbls/day
SK	3	SK3	Portable skimmer, > 480 bbls/day, < 2,880 bbls/day
SK	4	SK4	Portable skimmer, < 480 bbls/day
OSRV	1	OSRV1	Oil spill recovery vessel, length > 100 feet
OSRV	2	OSRV2	Oil spill recovery vessel, length > 50 feet, < 100 feet
OSRV	3	OSRV3	Oil spill recovery vessel, length > 30 feet, < 50 feet
OSRV	4	OSRV4	Oil spill recovery vessel, length < 30 feet
TUG	1	TUG1	Tugboat, > 6,000 HP
TUG	2	TUG2	Tugboat, > 1,500 HP, < 6,000 HP
TUG	3	TUG3	Tugboat, < 1,500 HP
DB	0	DB0	Deck barge
CB	0	CB0	Crane barge
WB	1	WB1	Workboat, > 100 feet
WB	2	WB2	Workboat, > 50 feet, < 100 feet
WB	3	WB3	Workboat, > 30 feet, < 50 feet
WB	4	WB4	Workboat, < 30 feet
LC	1	LC1	Landing craft, > 100 feet
LC	2	LC2	Landing craft, > 50 feet, < 100 feet
LC	3	LC3	Landing craft, > 30 feet, < 50 feet
SKF	0	SKF0	Flat-bottom skiff
PS	1	PS1	Portable storage, > 2,000 bbls
PS	2	PS2	Portable storage, > 500 bbls, < 2,000 bbls
PS	3	PS3	Portable storage, > 200 bbls, < 500 bbls

Resource Typing (Cont'd)

Kind	Type	Kind/Type	Description
PS	4	PS4	Portable storage, < 200 bbls
TT	1	TT1	Tank trailer, > 120 bbls
TT	2	TT2	Tank trailer/truck, > 70 bbls, < 120 bbls
TT	3	TT3	Tank trailer/truck, < 70 bbls
TB	1	TB1	Tank vessel/barge, > 50,000 bbls
TB	2	TB2	Tank vessel/barge, > 10,000 bbls, < 50,000 bbls
TB	3	TB3	Tank vessel/barge, > 1,000 bbls, < 10,000 bbls
TB	4	TB4	Tank vessel/barge, < 1,000 bbls
VT	1	VT1	Vacuum truck, > 120 bbls
VT	2	VT2	Vacuum truck, > 70 bbls, < 120 bbls
VT	3	VT3	Vacuum truck, < 70 bbls
A	0	A0	Fixed-wing aircraft
H	1	H1	Helicopter, 16 seats, 5,000-lbs cargo capacity
H	2	H2	Helicopter, 8 seats, 1,500-lbs cargo capacity
H	3	H3	Helicopter, 5 seats, 750-lbs cargo capacity
H	4	H4	Helicopter, 2 seats, 750-lbs cargo capacity
COM	0	COM0	Communications equipment
DT	0	DT0	Dump truck
TP	0	TP0	Transfer pump
SR	0	SR0	Support resource, e.g., generator, light tower
VH	0	VH0	Vehicle, e.g., pickup truck, van, UTV, ATV
TR	0	TR0	Trailer
AB	0	AB0	Absorbent materials
HC	1	HC1	Hazwoper-trained personnel, 40-hours
HC	2	HC2	Hazwoper-trained personnel, 24-hours
HC	3	HC3	Hazwoper-trained personnel, 4-hours
HC	4	HC4	Non-Hazwoper-trained personnel
DI	0	DI0	Marine diving unit

Resource Typing (Cont'd)

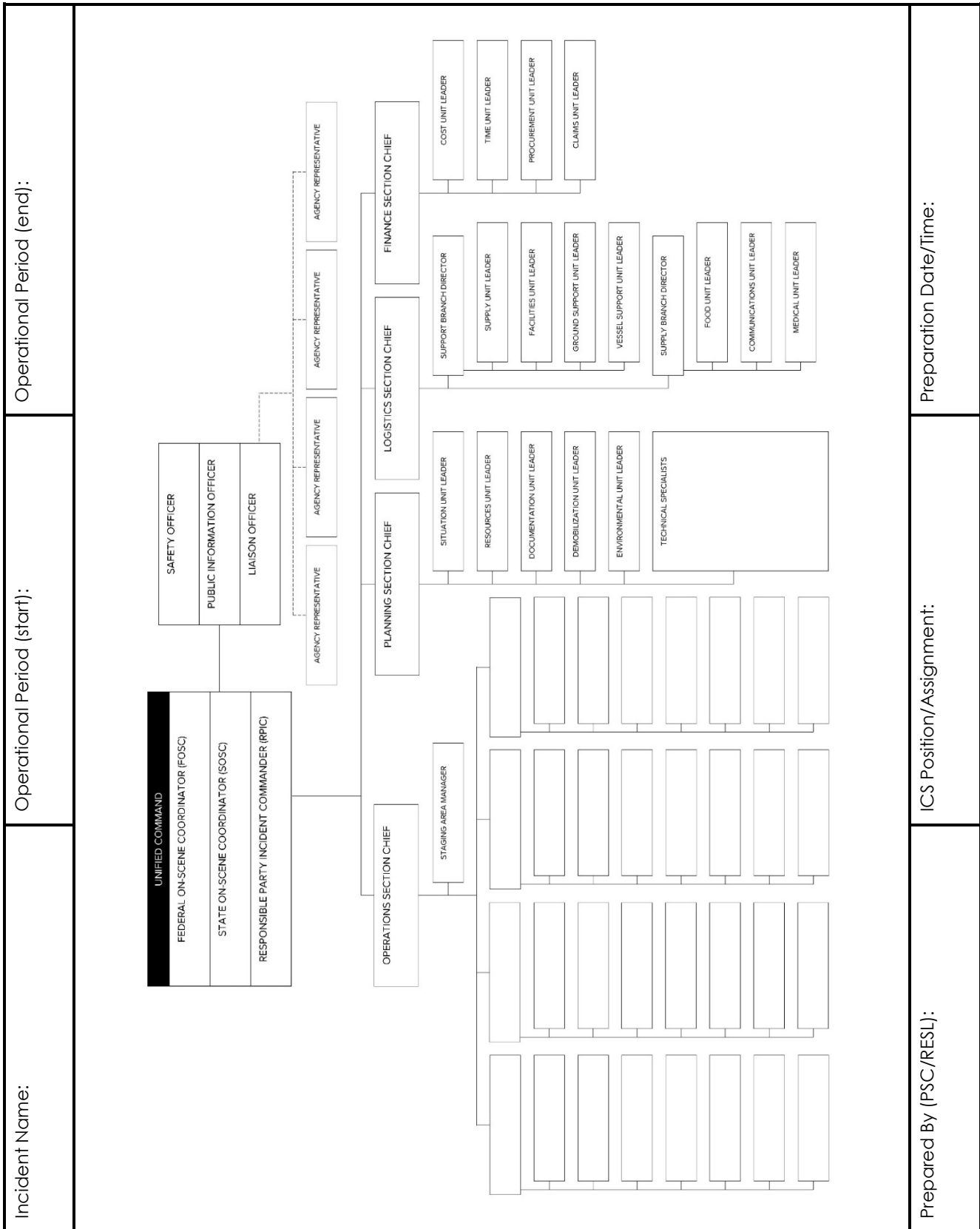
Kind	Type	Kind/Type	Description
CU	0	CU0	Underwater welding/cutting equipment
HA	0	HA0	Hauling equipment
WR	0	WR0	Wildlife response equipment
WD	0	WD0	Wildlife deterrence equipment
D	0	D0	Chemical dispersant
DD	1	DD1	Dispersant air application system, > 1,000 gals
DD	2	DD2	Dispersant air application system, < 1,000 gals
DD	3	DD3	Dispersant on-water delivery system
DM	1	DM1	Airborne dispersant monitoring system
DM	2	DM2	Waterborne dispersant monitoring system

Resources Unit Leader (RESL)

Organization Assignment List (ICS-203)

Incident Name:		Operational Period (start):		Operational Period (end):	
Command Staff:			Operations Section:		
Federal On-Scene Coordinator				Chief	
State On-Scene Coordinator				Staging Area Manager	
Local On-Scene Coordinator				Branch Directors:	
RP Incident Commander					
Safety Officer					
Public Information Officer					
Liaison Officer					
Agency Representatives:					
				Division/Group Supervisors:	
Logistics Section:					
Chief					
Support Branch Director					
Supply Unit Leader					
Facilities Unit Leader				Planning Section	
Ground Support Unit Leader				Chief	
Vessel Support Unit Leader				Situation Unit Leader	
Service Branch Director				Resources Unit Leader	
Food Unit Leader				Documentation Unit Leader	
Communications Unit Leader				Demobilization Unit Leader	
Medical Unit Leader				Environmental Unit Leader	
Finance Section:			Technical Specialists:		
Chief					
Cost Unit Leader					
Time Unit Leader					
Procurement Unit Leader					
Claims Unit Leader					
Prepared By (PSC/RESL):		ICS Position/Assignment:		Preparation Date/Time:	

Incident Organization Chart (ICS-207)



Equipment Check-in List (ICS-211e)

Incident Name:		Operational Period (start):				Operational Period (end):			
Check-in Location:									
Description	Identifier	Quantity	Supplier/Owner	POC	Assignment	Time-in	Time-out		
Prepared By (CHKN):	ICS Position/Assignment:				Preparation Date/Time:				

Personnel Check-in List (ICS-211p)

Incident Name:	Operational Period (start):	Operational Period (end):				
Check-in Location:						
Name	Agency/Organization	Position/Assignment	Telephone #/Radio	Signature	Time-in	Time-out
Prepared By (CHKN):			ICS Position/Assignment:		Preparation Date/Time:	

Example Resource Status Card (T-Card) (ICS-219)

ST/Unit:		LDW:	# Pers:	Order #:
Agency	Cat/Kind/Type		Name/ID #	
Front				
Date/Time Checked In:				
Leader Name:				
Primary Contact Information:				
Resource ID #(s) or Name(s):				
Home Base:				
Departure Point:				
ETD:		ETA:		
Date/Time Ordered:				
Remarks:				
Prepared by:				
Date/Time:				
ICS 219-7 EQUIPMENT (YELLOW)				

ST/Unit:		LDW:	# Pers:	Order #:
Agency	Cat/Kind/Type		Name/ID #	
Back				
Incident Location:		Time:		
Status:				
<input type="checkbox"/> Assigned <input type="checkbox"/> O/S Rest <input type="checkbox"/> O/S Pers <input type="checkbox"/> Available <input type="checkbox"/> O/S Mech <input type="checkbox"/> ETR: ____				
Notes:				
Incident Location:		Time:		
Status:				
<input type="checkbox"/> Assigned <input type="checkbox"/> O/S Rest <input type="checkbox"/> O/S Pers <input type="checkbox"/> Available <input type="checkbox"/> O/S Mech <input type="checkbox"/> ETR: ____				
Notes:				
Incident Location:		Time:		
Status:				
<input type="checkbox"/> Assigned <input type="checkbox"/> O/S Rest <input type="checkbox"/> O/S Pers <input type="checkbox"/> Available <input type="checkbox"/> O/S Mech <input type="checkbox"/> ETR: ____				
Notes:				
Prepared by:				
Date/Time:				
ICS 219-7 EQUIPMENT (YELLOW)				

ICS Forms & Reports

Organization
Assignment
List
(ICS-203)

Assignment
List
(ICS-204)

Incident
Organization
Chart
(ICS-207)

Equipment
Check-in List
(ICS-211e)

Personnel
Check-in List
(ICS-211p)

Resources
Request
(ICS-213-RR)

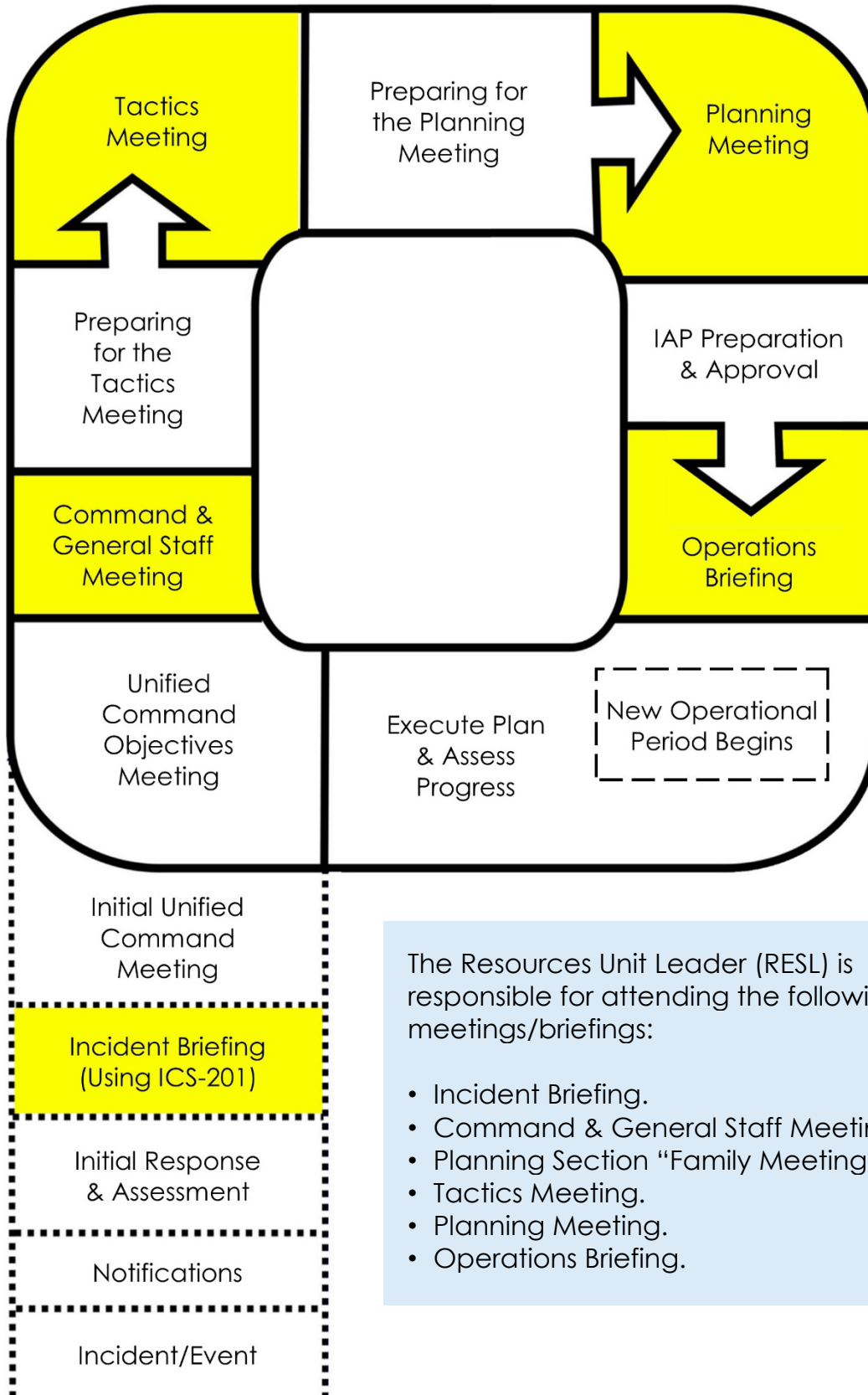
Unit
Activity Log
(ICS-214)

Individual
Activity Log
(ICS-214a)

Operational
Planning
Worksheet
(ICS-215)

Resource
Status Cards
(T-Cards)
(ICS-219)

Meetings & Briefings



The Resources Unit Leader (RESL) is responsible for attending the following meetings/briefings:

- Incident Briefing.
- Command & General Staff Meeting.
- Planning Section "Family Meeting".
- Tactics Meeting.
- Planning Meeting.
- Operations Briefing.

Initial Tasks & Responsibilities

- Receive a briefing from the Planning Section Chief (PSC) to gain a sense of the complexities of the documentation effort.
- Conduct an assessment on the status of incident documentation efforts currently underway. Attempt to obtain original versions of such working documents as:
 - Incident Briefing (ICS-201).
 - Site Safety & Health Plan (ICS-208), plus signature sheets.
 - Equipment Check-in List (ICS-211e).
 - Personnel Check-in List (ICS-211p).
 - Section/Unit Activity Logs (ICS-214).
 - Individual Activity Logs (ICS-214a).
- Consider staffing needs, while examining whether the Documentation Unit needs personnel support on a 24-hour basis during the height of the response.

Note: Staffing may include administrative assistants (for filing and photocopying), meeting stenographers, photographers, etc.
- Establish a suitable work area amongst other Planning Section staff. As the central hub for incident documentation, ensure the location is easily accessible for all Incident Management Team (IMT) members.
- Introduce yourself to key members of the Command and General Staff. Make them aware of incident-documentation needs. Stress the importance of thorough documentation.

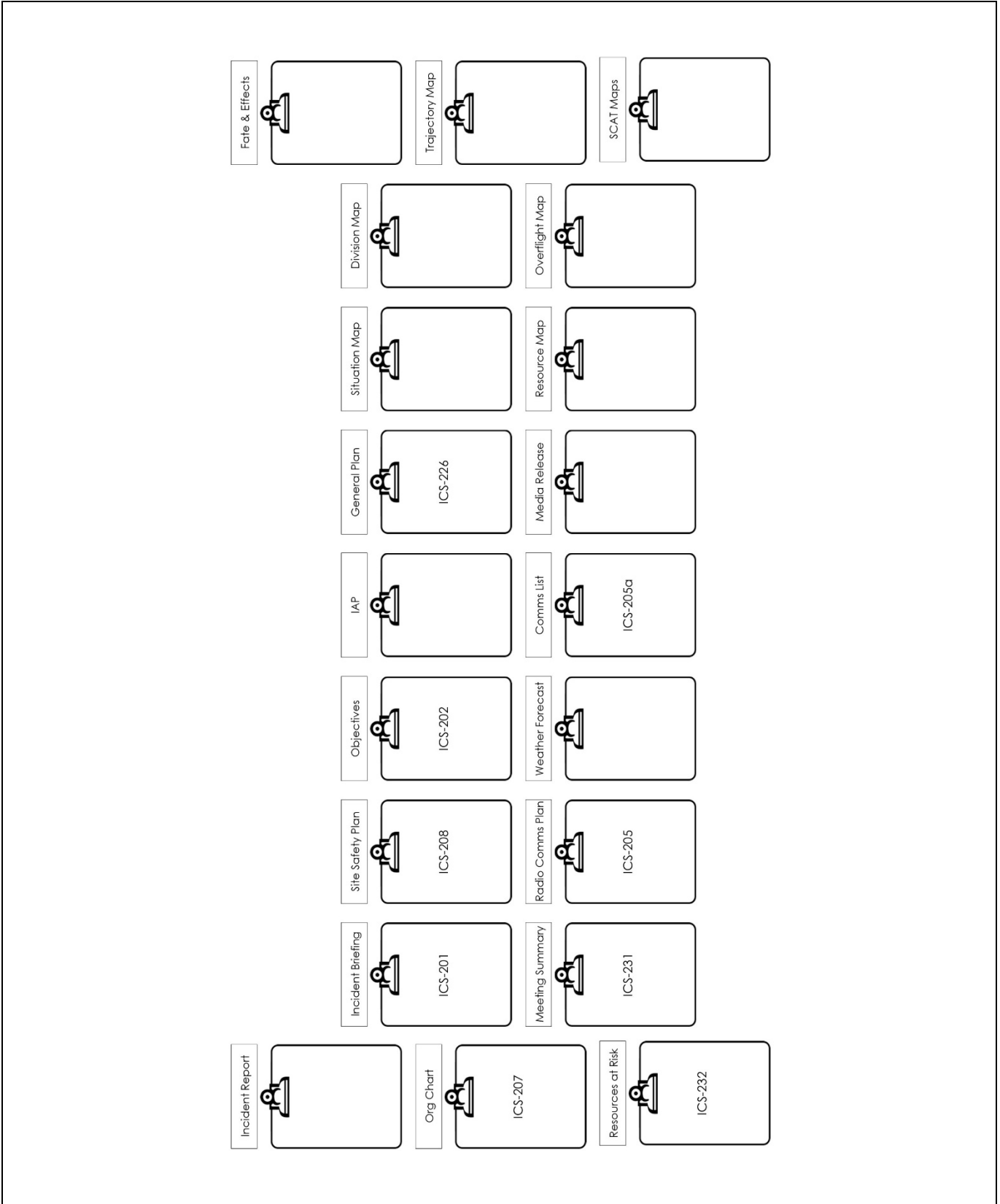
Incident Files

- Function as file custodian for incident records and documents, which may include paper, electronic, and photographic sources.
- Accept, organize, and store incident files and documentation for ready reference, analytical, legal, and historical purposes.
- Establish a central repository to receive and organize:
 - field notes.
 - incident reports.
 - ICS forms.
 - Incident Action Plans (IAPs).
 - Situation/Resource Displays.
 - maps/diagrams.
 - weather/marine forecasts.
 - check-in lists.
 - Activity Logs (ICS-214).
 - Pollution Reports (POLREPs), Situation Reports (SITREPs).
 - incident chronologies.
 - media releases.
 - wildlife rescue/rehabilitation records.
 - injury/damage claims.
 - agency directives.
 - regulatory permits.
 - communications logs.
 - purchase orders (POs).
 - vendor contracts.
 - cost accounting records.
 - decision memos.
 - legal correspondence.
 - photographs/videos.
 - electronic files.
 - faxes.
 - demobilization records, etc.
- Catalogue incident documentation to make it usable for the Incident Management Team (IMT).
- Stamp the date/time on all received documents.

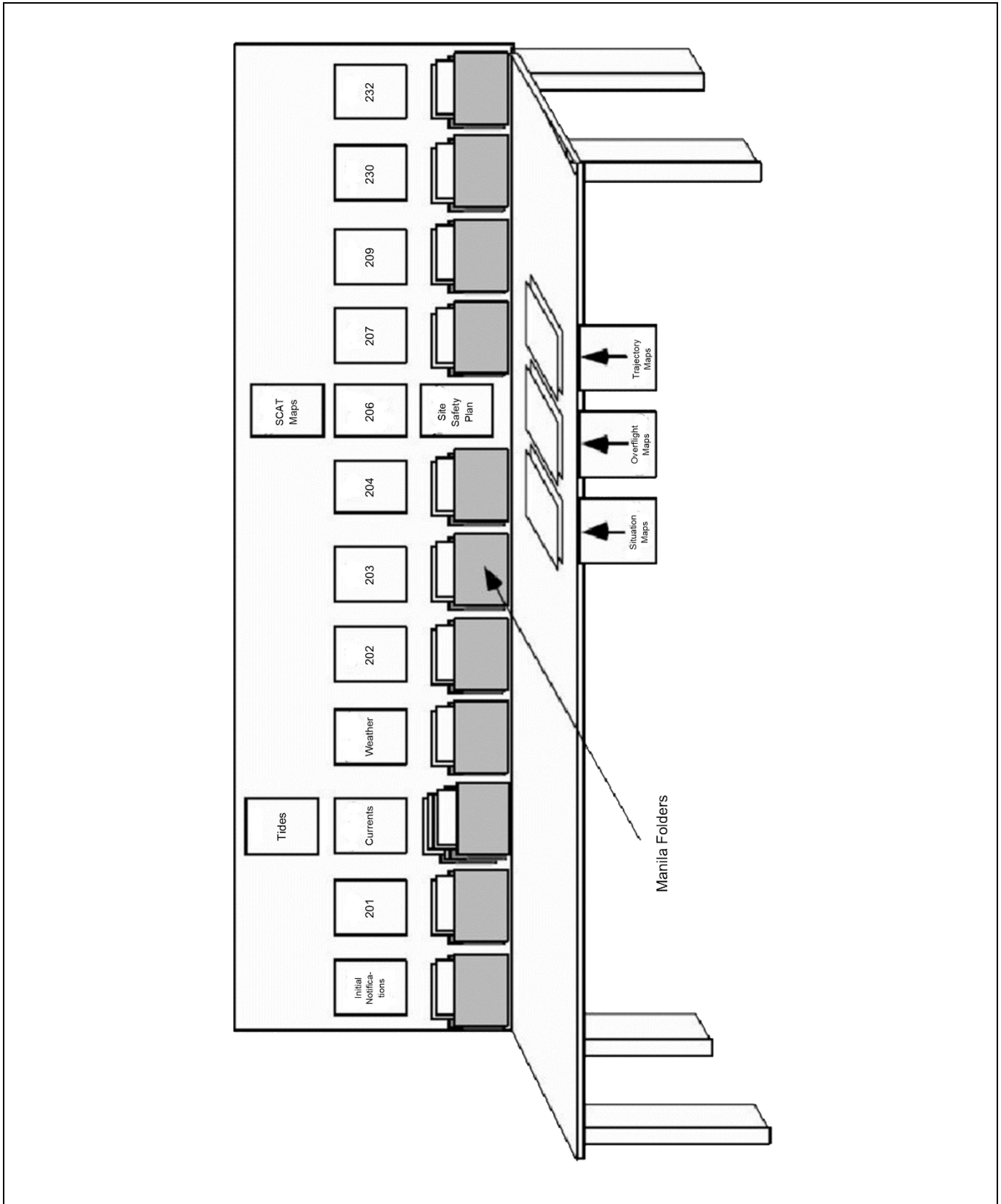
Incident Files (Cont'd)

- Briefly review all submitted documentation for accuracy and any obvious errors/omissions. Ensure documents include basic information, e.g., originator's name, ICS position/assignment, date, operational period, etc.
- Correct any errors, omissions, or discrepancies by contacting the appropriate individual or ICS section/unit. For minor revisions, pen and ink changes may be appropriate. If significant, documents should be returned to the originator for correction. If systemic, issues should be brought to the attention of the appropriate Section Chief, Branch Director, Division/Group Supervisor, Unit Leader, etc.
- File documents in a consistent and logical manner:
 - in chronological order (by calendar date/time).
 - by operational period.
 - by subject matter/form number (hence sub-categorized by date) (preferred).
 - by IMT position (hence sub-categorized by date).
- For larger incidents, consider maintaining an additional file of all documents by the date they were generated, as this can make items easier to find later in the response.
- Use literature holders or hanging file folders to organize and display documentation for easy access (refer to pages 44-45).
- Reproduce a sufficient number of blank (and completed) ICS forms, reports, and documents to meet anticipated requests by incident personnel.

Incident Files (Cont'd)



Incident Files (Cont'd)



Document Collection

- Establish processes to capture and preserve critical documents and decisions made during the incident.

Note: Documentation typically has to be “pulled” out of the organization. The Documentation Unit Leader (DOCL) oftentimes has to go looking for incident documents, instead of relying upon documents being “pushed” towards submittal.

- Distribute log books and the appropriate documentation forms. Ensure everyone keeps written records of critical decisions, issues, and events, using Section/Unit Activity Log (ICS-214) (page 139) and Individual Activity Log (ICS-214a) (page 140).
- Publish documentation guidelines (refer to page 47) for incident personnel, seeking advice from the Legal Officer, as necessary.
- Communicate the need for team members to submit copies of all documents created.
- Make incident documentation a topic of discussion at the daily Command & General Staff Meeting.
- Liaise with key members of the ICS organization to familiarize personnel with established documentation guidelines.
- Request support from the Command & General Staff. Encourage them to emphasize the importance of thorough documentation to members of their individual staffs.
- Publish (and post) a list of different types of documents that need to be turned in to the Documentation Unit.
- Proactively seek out original documents from each ICS section/unit.
- Correct any gaps in the collection process. Identify forms and reports that are not being received on a regular basis.
- Place “in-boxes” in each ICS section/unit, located near printers, photocopiers, trash/recycle bins, work areas, etc. Ensure “in-boxes” are clearly labeled. Establish a regular schedule to retrieve documents from “drop boxes”.

Documentation Guidelines

- Note the date and time of all entries.
- Note the names of any persons with which you communicated.
- Record an event as soon as practical after it occurs.
- Be accurate.
- Be specific.
- Be factual; avoid opinion and speculation.
- Use plain, precise, and consistent terminology.
- Avoid slang, shorthand, or other abbreviations that may not be understood without explanation.
- Indicate sources of information, especially sources external to the company.
- Use the right words to describe interactions with others, e.g., advise, order, recommend.
- Avoid assessment of blame or liability for the incident.
- Assume nothing will remain confidential.

Electronic Media

- Seek opportunities to leverage technology to capture documents.
- Use organizational, web-based, information portals, e.g., Microsoft SharePoint, to post digital documentation for reference and use.
- Establish a "Documentation Unit" email mailbox, e.g., Documentation.Unit@Maple-Valley-Incident.com, to receive documentation from members of the Incident Management Team (IMT).
- Archive incoming/outgoing emails to/from members of the ICS organization into an electronic filing system, e.g., Microsoft Outlook.
- Produce a backup method for electronic files.
- Establish procedures for the labeling and cataloging of digital photographs.

Duplication Services

- Secure access to a photocopier machine (and backup) and provide duplication services for the Incident Management Team (IMT).

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

- Take time to consider total copying needs for the incident.
- Realize the Documentation Unit Leader (DOCL) may be considered the “copier expert” on the incident, with the expectation that a photocopier be available whenever somebody wants to make a copy.
- Consider the following:
 - number/size of photocopiers.
 - monochrome vs. color.
 - minimum copying speed (pages per minute).
 - ability to make two-sided copies.
 - paper sizes (letter, legal, tabloid).
 - multiple trays capable of handling various paper sizes.
 - collating function.
 - backup plans, if the photocopier stops working during a high-priority copying job in the middle of the night.
- Ensure vendor offers training on photocopier operation, clearing the inevitable paper jam, changing toner, adding staples, etc. Ask vendor to provide all toner.
- Execute agreements with a commercial copying/duplicating business, e.g., Alphagraphics, FedEx Office, UPS Store.
- Establish timelines and priorities with regards to duplication needs for the Incident Action Plan (IAP) versus other photocopying requests for incident personnel. Post duplication schedules in a highly-visible location in the Incident Command Post (ICP) to ensure everyone is aware of availability. Alternatively, make two copiers available in the Documentation Unit: one large copier for duplicating the IAP, and another smaller copier to handle other photocopying needs.
- Develop a system for requesting copies. Have individuals attach a General Message (ICS-213) form with copying instructions, specifying number of copies, completion timeframe, contact information, etc.

Document Security

- Request approval from the Planning Section Chief (PSC) and Legal Officer prior to the release of select documentation.
- Clarify the authority to release incident documentation/reports outside of the Command & General Staff.
- Determine security/classification requirements and the labeling of documents, e.g., For Official Use Only (FUOU) designations.
- Establish processes for handling proprietary or sensitive materials, in accordance with company/agency policy.
- Establish procedures for responding to Freedom of Information Act (FOIA) requests. Write an incident-specific request protocol, indicating which documentation will be immediately available and providing assurance the requestor will be notified when the archive is complete.
- Support documentation requirements with regard to incident investigations, e.g., criminal, transportation, OSHA, injuries/accidents, safety analysis, terrorism, etc.
- Treat incident files as sensitive. Provide the appropriate level of safeguarding. Maintain incident documentation in locked file cabinets (or inside a locked room).
- Monitor, control, and limit use of shredders to protect the collection of documentation.
- Realize documentation files may have to stand up to scrutiny in a court of law to determine when key decisions were made during the course of response operations.

Incident Action Plan (IAP) Support

- Assist with compilation of the Incident Action Plan (IAP).
- Duplicate sufficient copies of the Incident Action Plan (IAP), along with other ICS forms and reports, for attendees at the various daily meetings and briefings.
- Question whether copies of the Incident Action Plan (IAP) may need to be bundled per operational division/function and respective ICS section, which requires banding and labeling. Alternatively, confirm all copies may be placed in a single box.
- Confirm whether the Incident Action Plan (IAP) needs to be emailed/faxed to other locations, e.g., staging areas, agency offices, corporate offices, etc., or posted to an FTP site.
- Before making multiple copies of the Incident Action Plan (IAP), make one or two high-quality copies to be used as masters, then put the originals in the incident files. Number the pages in pencil on the back, just in case the master copy is dropped or jams in the copier.
- Attach a blank copy of Individual Activity Log (ICS-214a) to the back of the Incident Action Plan (IAP), enabling recipients to flip over their copy to easily make notes.
- Ensure printing is finished at least one hour prior to the Operations Briefing.

Note: The Incident Action Plan (IAP) can take considerable time to prepare, which may require the Documentation Unit to wait until late in the day/night to actually start photocopying. If collating and stapling the copied IAP is also required, it could be an all-night affair.

Meetings & Briefings

- Take minutes at the respective daily meetings/briefings, using Meeting Summary (ICS-231) (page 53).
- Confirm which meetings/briefings to attend (typically those where the Incident Commander (IC)/Unified Command is making key decisions on the direction of response operations, including the Unified Command Objectives Meeting, Command & General Staff Meeting, and Planning Meeting).
- Determine whether Documentation Specialists should attend any Special Purpose Meetings, taking place outside of the normal planning process, to record important decisions/discussions.
- Complete/maintain Open Action Tracker (ICS-233) (page 54) during the respective meetings/briefings.
- Organize and set up meeting/briefing rooms, together with the Situation Unit Leader (SITL). Outfit meeting rooms with easels/flip charts, tent cards, meeting signs, poster displays, etc.
- Make incident documentation a prominent discussion topic during the Command & General Staff Meeting.

Meeting Summary (ICS-231)

Incident Name:	Operational Period (start):	Operational Period (end):
Meeting Name:		Meeting Location:
Meeting Date/Time:		Facilitator:
Attendees:		
Agenda/Outline:		
Minutes:		
Prepared By (DOCL):	ICS Position/Assignment:	Preparation Date/Time:

Open Action Tracker (ICS-233)

Incident Name:		Operational Period (start):			Operational Period (end):		
Task #	Task Description	Assigned To	Date/Time Assigned	Deadline	Status		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
					<input type="checkbox"/> Completed		
Prepared By (PSC/SITL/DOCL):		ICS Position/Assignment:			Preparation Date/Time:		

Document Archive

- Store files for post-incident reference, realizing the archive may be used as a legal record of response actions, thus it must be complete and comprehensive enough to stand up to scrutiny.
- Organize files in such a manner that allows easy access and retrieval.
- Conduct Quality Assurance on the archive as it's being assembled. Fix any missing or inaccurate files. Insert notes to explain any gaps in documentation. Eliminate any duplicate copies, if a single copy is sufficient.
- Determine whether the master file contains individual documents which a user might want to access individually.
- Develop a database (using Microsoft Access or similar software) to capture the entire archive, enabling searchers to query the archive, hence locate specific files/documents by key words. Sequentially number each document for inclusion in the database. Maintain a master index of key words used for the database entry process.
- Copy database files to external hard drives/USBs.
- Write a chronology of events, footnoted by document numbers.
- Determine how the archive will be stored, accessed, and maintained after demobilization.

Final Incident Package

- Prepare the Final Incident Package.

Note: The Final Incident Package is essentially a chronological listing of everything that occurred on the incident. It typically contains a collection of narrative reports that describes what was done, obstacles encountered, and actions taken. The package is essential for follow-up on fiscal matters, potential post-incident litigation, and re-creation of an incident timeline.

- Store the Final Incident Package in standard/labeled boxes and tubes. Ensure it is indexed and neat/well-organized.

Note: For larger incidents, there may be 4 or 5 boxes of information. For smaller incidents, there may be 1/2 box of content.

- Identify boxes on the outside with the incident name, incident number, dates, and location, along with sequential box number, e.g., "Box 1 of X".
- Affix/tape the index to the exterior of the box. Insert the index in a plastic sheet protector. Place another copy of the index inside each box. If multiple boxes are used, create an index for each box, plus a master index indicating what types of records are in each box.

Note: If replaced by another Incident Management Team (IMT), the package should be in suitable condition to allow the next team to continue accurate filing.

ICS Forms & Reports

Resources
Request
(ICS-213-RR)

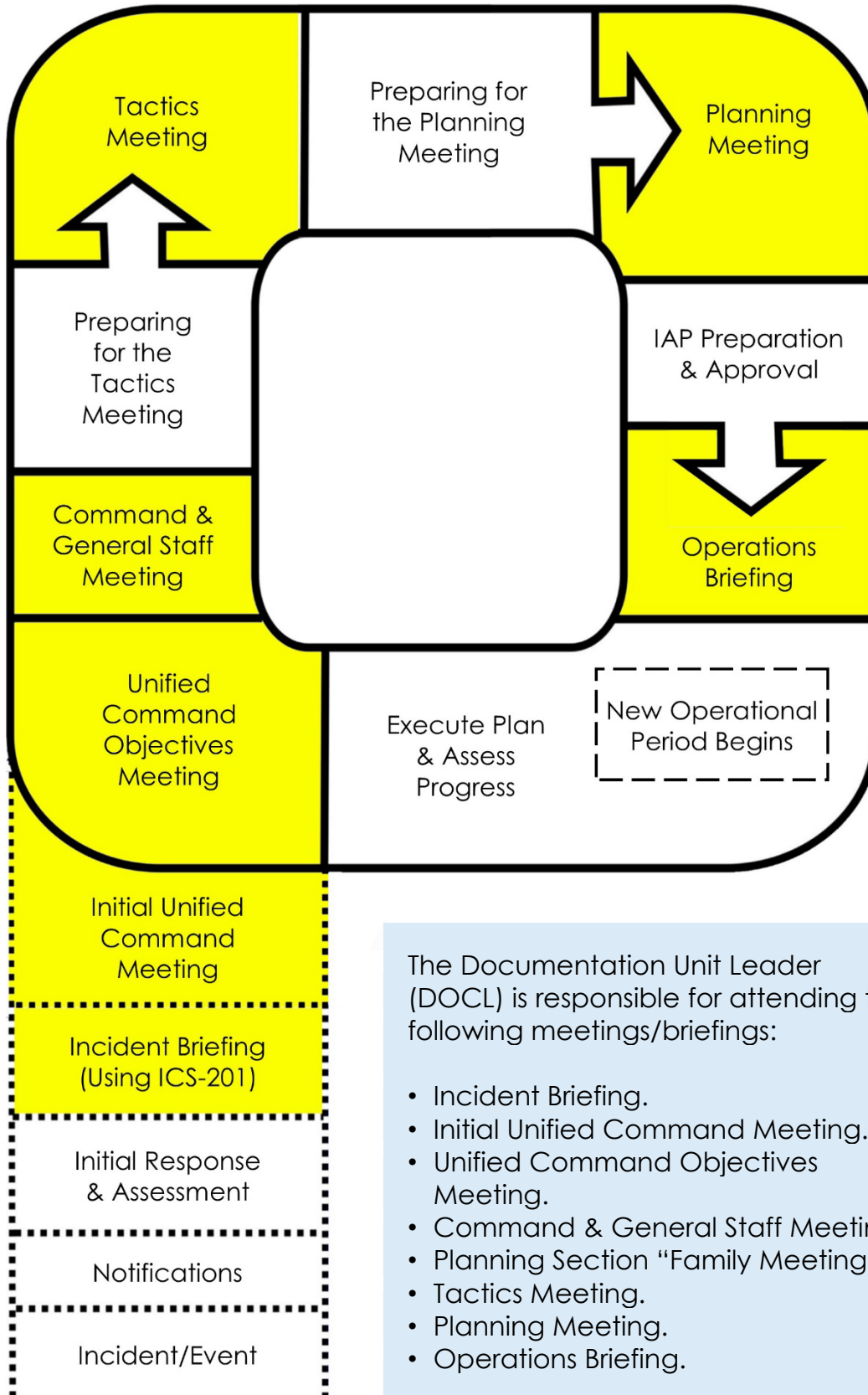
Unit
Activity Log
(ICS-214)

Individual
Activity Log
(ICS-214a)

Meeting
Summary
(ICS-231)

Open Action
Tracker
(ICS-233)

Meetings & Briefings



The Documentation Unit Leader (DOCL) is responsible for attending the following meetings/briefings:

- Incident Briefing.
- Initial Unified Command Meeting.
- Unified Command Objectives Meeting.
- Command & General Staff Meeting.
- Planning Section "Family Meeting".
- Tactics Meeting.
- Planning Meeting.
- Operations Briefing.

Tasks & Responsibilities

- Address environmental matters associated with the response, encompassing strategic assessment, modeling, surveillance, sensitive area identification, environmental monitoring, and permitting, among others.
- Provide scientific/technical expertise and advice, combined with interpretations of environmental data, to members of the Incident Management Team (IMT).
- Reference the OPA '90 Spill Response Plan, Area Contingency Plan (ACP), and High Consequence Area (HCA) maps to ascertain what measures may need to be taken to protect sensitive areas at risk of potential contamination. Consider the vulnerability of such environmental, socioeconomic, and cultural features as:
 - wetland habitats.
 - wildlife populations, including rare, threatened, and endangered species.
 - public recreational areas.
 - historical/archeological sites.
 - residential communities.
 - schools.
 - hospitals/nursing homes.
 - commercial businesses.
 - industrial facilities.
 - groundwater wells/recharge zones.
 - transportation corridors, e.g., roads, railroads.
 - public utilities.
- Identify environmental, socioeconomic, and cultural sensitivities on Resources at Risk Summary (ICS-232) (page 64). Prioritize sites according to their relative degree of sensitivity and potential threat of contamination, e.g., #1/#2/#3, A/B/C, high/medium/low, ◊/◊◊/◊◊◊, etc.
- Reach out to federal, state, and local regulators for assistance in identifying, evaluating, and mitigating hazards and threats. Integrate expertise from government agencies, universities, and industry into the Environmental Unit.
- Seek input from the NOAA Scientific Support Coordinator (SSC), who serves as the principal advisor to the lead federal agency for scientific issues.

Note: The NOAA SSC may provide expertise relating to chemical hazards, trajectory analysis, resources at risk, cleanup methodologies, weather forecasting, information management, alternative response technologies (in-situ burning), etc. The SSC also serves as a liaison with members of the scientific community and natural resource trustee agencies assisting with the response.

Tasks & Responsibilities (Cont'd)

- Assign various Technical Specialists (THSP), as necessary, based on the scope and parameters of the discharge:
 - Sampling Specialist.
 - Response Technologies Specialist.
 - Trajectory Analysis Specialist.
 - Weather Forecasting Specialist.
 - Resources at Risk (RAR) Specialist.
 - Air Modeling Specialist.
 - Shoreline Cleanup Assessment Specialist.
 - Historical/Cultural Resources Specialist.
 - Disposal Technician Specialist.
 - Geographic Information Systems (GIS) Specialist.
 - Geologist.
 - Hydrologist.
 - Geophysicist.
 - Environmental Toxicologist.
 - Environmental Scientist.
 - Chemical Product Specialist.
 - Local Public Health Authorities.
 - State Environmental Agencies.
 - University Faculty Members.
 - Native American Specialist.
 - Mobile Laboratory Service.

- Examine the fate, transport, and disposition of chemical pollutants through various transportation mediums, including air, ground, and water. Consider the environmental processes of wind, water, precipitation, sunlight, groundwater flow, etc.

- Contact the National Oceanic & Atmospheric Administration (NOAA), Office of Response & Restoration (OR&R) to arrange for transmission of a spill trajectory, as soon as spill details and weather forecasts are available, if the discharge impacts a surface waterway.

- Conduct site investigations to characterize the nature and extent of any potential groundwater contamination. Conduct a water well search of the immediate area. Identify groundwater flow patterns and hydrology.

- Understand how contaminants transmit through the environment. Recommend environmental mitigation techniques to minimize impacts upon human health.

Tasks & Responsibilities (Cont'd)

- Acquire, distribute, and provide analysis of daily weather forecasts.
- Coordinate the initiation, documentation, and implementation of environmental permitting. Evaluate whether federal, state, and/or local permits may be necessary to perform initial response actions. Begin the permit application process, as warranted.
- Consult with natural resources trustees regarding any site clearing/grubbing of trees and vegetation to facilitate access for site response activities.
- Manage erosion and runoff from the spill site, through berms, dams, diversion channels, silt fences, natural fiber erosion control materials, hay bales, and other engineered devices. Cover any stockpiled soil with visqueen sheets. Obtain a stormwater construction permit, if more than one (1) acre may be disturbed.
- Address waste management. Ensure recovered product and generated wastes are collected, stored, transported, and disposed of in compliance with applicable regulations and in an environmentally sound manner.
- Manage waste streams through preparation of a formal Waste Management Plan, addressing such issues as:
 - waste collection.
 - locations of interim waste storage areas.
 - projected duration of temporary storage.
 - waste segregation strategies.
 - environmental/community protection measures.
 - waste characterization/sampling protocols.
 - options for the treatment and disposal of liquid and solid wastes.
 - methods of waste transportation.
 - locations/contacts of all waste treatment and disposal site selections.
- Draft a Wildlife Response Plan, in coordination with the lead State environmental agency, if wildlife populations may be at risk of contamination.
- Manage the hazing, capture, treatment, and rehabilitation of affected wildlife, by securing the services of trained wildlife professionals, such as Tri-State Bird Rescue & Research and International Bird Rescue & Research Center (IBRRC). Provide input on wildlife protection strategies, e.g., capture (including pre-emptive capture), hazing, treatment, oiled carcass removal, etc.

Tasks & Responsibilities (Cont'd)

- Provide expertise on living resources and their habitats. Employ qualified biologists and botanists to inventory the locations of any migratory bird/raptor nests, special-status plant species, small animal burrows, etc. within the projected path of the spill plume. Delineate sensitive habitats in close proximity to operational activities with flagging tape and construction lath, with an appropriate buffer as determined by natural resources trustees.
- Identify and develop plans for the protection of historical/cultural resources, in consultation with State Historic Preservation Officers (SHPOs), land management agencies, and other concerned parties. Draft instructions for work crews in the event any historical or cultural artifacts are uncovered during on-site activities.
- Implement a water sampling protocol, implementing both pre-impact baseline testing and the collection of samples in close proximity to visible oil indicators. Analyze samples for polynuclear aromatic hydrocarbons (PAH), total recoverable petroleum hydrocarbons (TRPH), and volatile organic compounds (VOC).
- Screen soil samples for the presence of petroleum impacts, using odor, oil sheen test, and organic headspace. Arrange for laboratory analysis for total petroleum hydrocarbons (TPH), diesel range organics (DRO), and benzene, toluene, ethyl benzene, and xylene (collectively known as BTEX) as an indicator of clean soil conditions.
- Formulate recommendations for the cleanup and restoration of contaminated environments. Assemble Shoreline Cleanup Assessment Technique (SCAT) teams to formulate recommendations for the cleanup and restoration of contaminated environments, monitor the environmental consequences of cleanup actions, and oversee implementation of the Site/Shoreline Cleanup Plan. Provide the Operations Section Chief (OSC) and Planning Section Chief (PSC) with recommendations on cleanup countermeasures.
- Perform a Net Environmental Benefit Analysis (NEBA) prior to site/shoreline cleanup operations. Define an economically reasonable cleanup endpoint by studying the incremental environmental and socioeconomic benefits of cleanup operations versus typically increasing costs.

Note: Factors that should be considered during cleanup operations include ecological sensitivity, persistence of oil in the environment, proximity to surface resources (including shorelines, beaches, water intakes, infrastructure, and economically-valuable marine resources), possibility of historical/archeological resources, and presence of rare, threatened, and endangered species.

Tasks & Responsibilities (Cont'd)

- Conduct final inspections of remediated habitats, confirming they meet specific cleanup endpoint standards.
- Coordinate Natural Resource Damage Assessment (NRDA) studies with federal, state, and local agencies and natural resources trustees. Quantify potential damages upon environmentally sensitive habitats, threatened and endangered species, cultural resources, etc.
- Provide environmental technical expertise as the Incident Action Plan (IAP) is developed. Work with the Operations Section Chief (OSC) and Planning Section Chief (PSC) to draft and prioritize strategies and tactics to protect environmentally sensitive sites.
- Note any unique environmental concerns, e.g., wetlands, migratory bird habitat, bald eagle nest, endangered species, archeological/historical artifacts, etc., at the respective operational worksites. Outline any specific procedures or mitigation measures on the Assignment List (ICS-204) worksheets, for incorporation into the Incident Action Plan (IAP).
- Prepare various maps and visual displays:
 - Environmental Impact Map.
 - Spill Plume Trajectory/Forecast Map.
 - Pollution Fate/Budget Analysis.
 - Sensitive Area Maps.
 - Resources at Risk (RAR).
 - Endangered Species Habitat Map/List.
 - Wildlife Impact List.
 - Weather Report Narrative.
 - Air Monitoring Results Map/Log.
 - Cleanup Progress Map/Log Sheet.
 - Cultural/Archaeological Lists.
- Submit a daily log of actions, decisions, events, and conversations, using either Section/Unit Activity Log (ICS-214) or Individual Activity Log (ICS-214a) (refer to pages 139-140), to the Documentation Unit.

Resources at Risk Summary (ICS-232)

Incident Name:		Operational Period (start):		Operational Period (end):	
Site #	Site Name/Location	Priority	Site Issues/Characteristics		
Prepared By (ENVL):		ICS Position/Assignment:		Preparation Date/Time:	

ICS Forms & Reports

Assignment
List
(ICS-204)

Resources
Request
(ICS-213-RR)

Unit
Activity Log
(ICS-214)

Individual
Activity Log
(ICS-214a)

Resources
at Risk
Summary
(ICS-232)

Spill
Trajectory
Analysis

Pollution Fate/
Budget
Analysis

Waste
Management
Plan

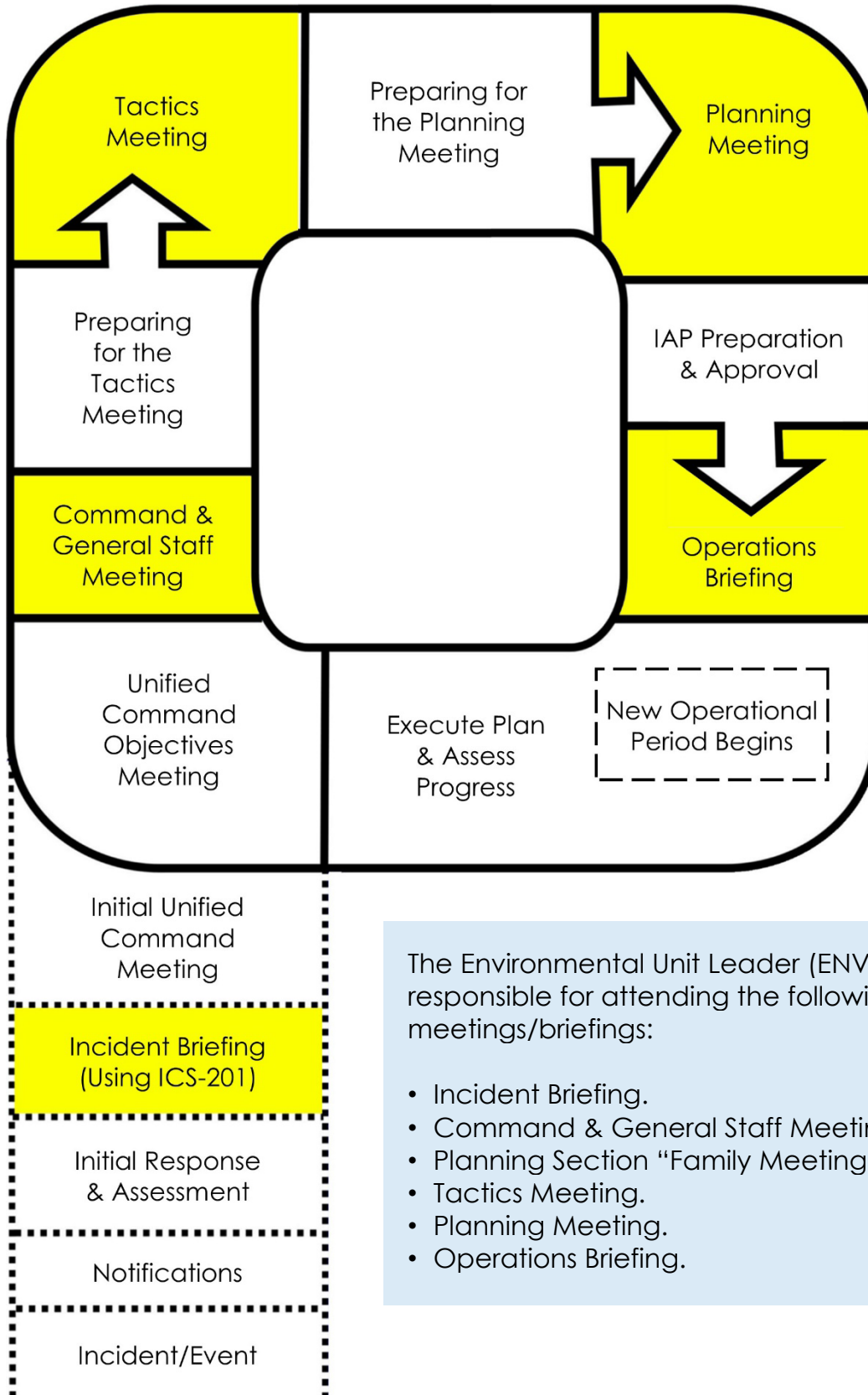
Site/Shoreline
Cleanup
Plan

Wildlife
Response
Plan

Soil/Water
Sampling
Plans

Weather
Forecast

Meetings & Briefings



The Environmental Unit Leader (ENVL) is responsible for attending the following meetings/briefings:

- Incident Briefing.
- Command & General Staff Meeting.
- Planning Section “Family Meeting”.
- Tactics Meeting.
- Planning Meeting.
- Operations Briefing.

Equipment Demobilization

- Identify and prepare a list of surplus equipment potentially ready for demobilization.

Note: Branch Directors (OPBD), Division/Group Supervisors (DIVS), and Unit Leaders in the ICS organizational structure are typically responsible for identifying candidate surplus resources under their direction. The Demobilization Unit Leader (DMOB) assembles the master list of equipment recommended for release.

- Verify each candidate resource is not planned for use on another task.
- Release equipment in groups by geographic location to minimize delays and travel costs, whenever possible.
- Prioritize the release of equipment as follows:
 1. Federal/state government resources.
 2. Assets provided by local emergency responders.
 3. Mutual aid and sub-contractor resources, including equipment rentals.
 4. Primary contractor resources.
 5. Company-owned resources.
- Examine financial considerations by prioritizing the release of resources according to increasing costs, as appropriate.
- Generate a formal equipment release report, detailing the kind/type of equipment, ownership, and release dates/times. Submit the Tentative Release List (ICS-236) (page 72) for Unified Command approval.
- Prepare individual Demobilization Check-out (ICS-221) forms (page 71), either paper-based or electronic, to facilitate the orderly demobilization of equipment.
- Notify contractors, sub-contractors, and equipment owners of released resources when final approval instructions are obtained (at least 24 hours prior to the planned release time).
- Thoroughly decontaminate all equipment prior to release.

Note: Contaminated equipment that cannot be sufficiently cleaned must be disposed of at a licensed facility.

Equipment Demobilization (Cont'd)

- Provide safety inspections and repairs on vehicles, boats, and equipment under hire, prior to release.

Note: Equipment damaged beyond repair must be properly disposed of in accordance with appropriate laws and regulations.

- Refer any potential claims for compensation, related to damaged or contaminated equipment, to the Claims Unit (COMP).
- Review documents related to leased, rented, or borrowed equipment to ensure resources are released in compliance with applicable terms and conditions.
- Require contractors, suppliers, and vendors to sign-off that their resource was released from the incident, by initialing the appropriate box on the Demobilization Check-out (ICS-221) forms.
- Expedite the return of demobilized resources to their respective owners via the appropriate method(s) of transportation.
- Update the Demobilization Tracking Table (ICS-238) (page 73) as the equipment demobilization process evolves.

Personnel Demobilization

- Identify and prepare a list of surplus personnel no longer needed in support of the response.

Note: Branch Directors (OPBD), Division/Group Supervisors (DIVS), and Unit Leaders in the ICS organizational structure are typically responsible for identifying candidate surplus resources under their direction. The Demobilization Unit Leader (DMOB) assembles the master list of personnel recommended for release.

- Evaluate the benefits and risks of demobilizing personnel, based on both existing and potential work assignments. Forecast staffing requirements by factoring in rotations, shift work, time off, etc.
- Release personnel either singly or in groups, in a manner consistent with applicable contractual requirements. Facilitate demobilization by releasing resources with pre-established shared transportation, where possible.
- Prioritize the release of personnel as follows:
 1. Volunteers.
 2. Private contractors.
 3. Federal agency representatives.
 4. State agency representatives.
 5. Contracted spill management teams (SMTs).
 6. Company personnel.
- Generate a formal personnel release report, detailing the number/count of released personnel, their names and affiliations, and release dates/times. Submit the Tentative Release List (ICS-236) (page 72) for Unified Command approval.
- Prepare individual Demobilization Check-out (ICS-221) forms (page 71), either paper-based or electronic, to facilitate the orderly demobilization of personnel.
- Communicate decisions to release personnel from their assignments to the respective individuals (or their employers), either verbally or in writing, at a minimum of 48 hours ahead of the planned release time.
- Post tentative release schedules at conspicuous locations in the Incident Command Post (ICP), Staging Area, mess halls, etc., to allow for optimum visibility.

Personnel Demobilization (Cont'd)

- Ensure demobilized personnel return/submit:
 - all records and reports documenting their efforts during the response, including Individual Activity Logs (ICS-214a).
 - personnel time logs and expense reports, with signatures.
 - company-owned, rented, or leased non-expendable tools and supplies, either received or requisitioned during the response.
 - any borrowed electronics and communications equipment, including laptop computers, printers, radios, cell phones, and digital cameras.
 - non-consumable, personal protective equipment (PPE).
 - incident credentials, e.g., security badges.

- Document and forward any injury claims to the Claims Unit (COMP).

- Schedule post-incident health assessments with the Medical Unit (MEDL). Provide demobilized personnel with the opportunity to undergo critical incident stress management.

- Complete incident performance ratings (ICS-225), upon request. Submit completed forms to the Documentation Unit (DOCL).

- Require individuals/crew leaders to sign-off that they have been released from the incident, by initialing the appropriate box on the Demobilization Check-out (ICS-221) forms.

- Update the Demobilization Tracking Table (ICS-238) (page 73) as the personnel demobilization process evolves.

- Consult with the Safety Officer (SOFR) to ensure all responders traveling by vehicle for more than 2 hours have a minimum of 6 hours of rest prior to release.

Note: Any exceptions to the 6-hour rule must have the approval of the Unified Command.

- Arrange overnight lodging for demobilized personnel, as appropriate. Secure flight reservations and arrange for ground transportation (buses, vans, taxis, commuter shuttles, ride-sharing vehicles), as necessary.

- Request demobilized personnel to submit a final itinerary for travel to their home office/base.

- Confirm arrival at their home destination, via telephone call and/or email.

Demobilization Unit Leader (DMOB)

Demobilization Check-out (ICS-221)

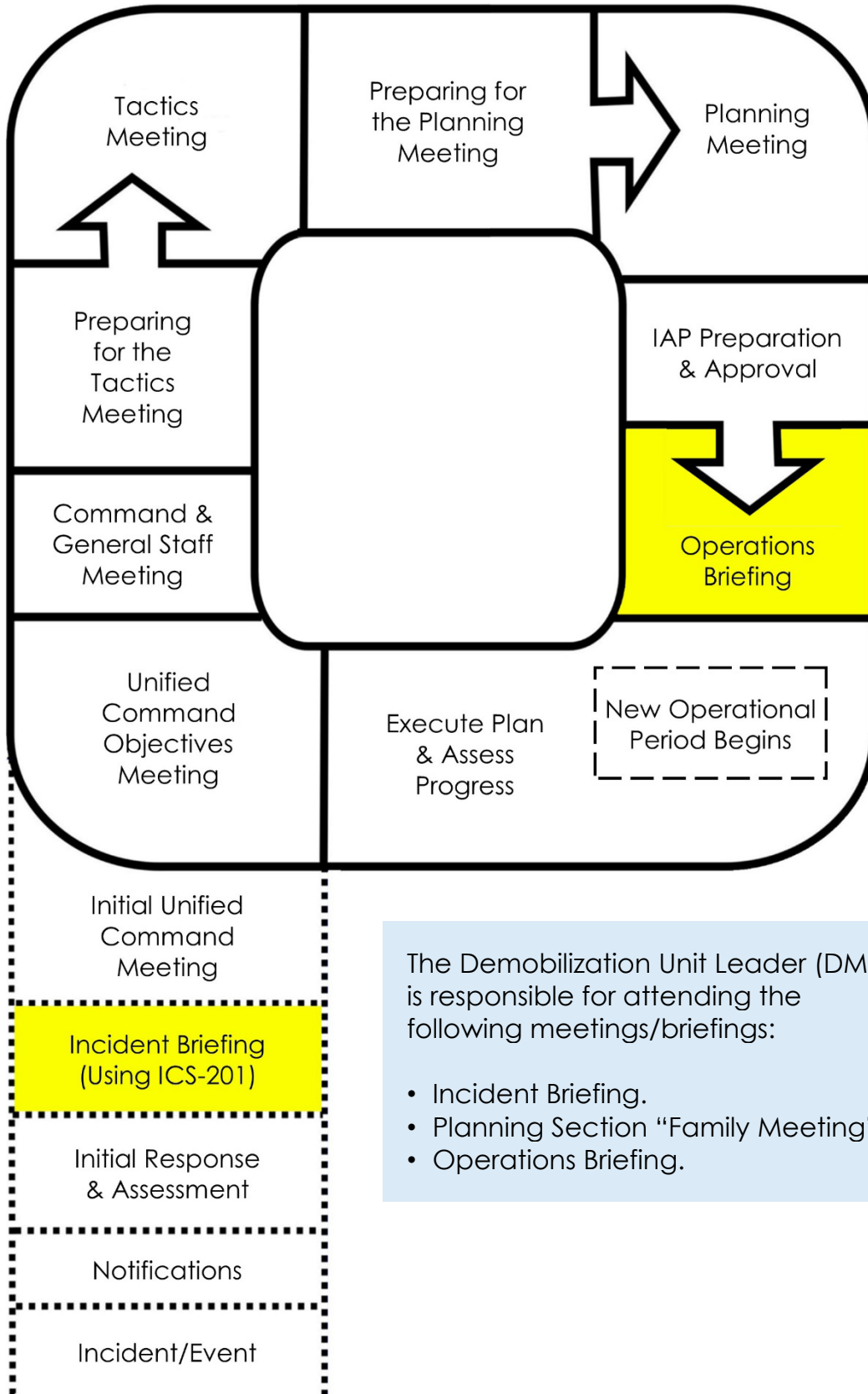
Incident Name:		
Name of Person/Resource Demobilized:	Agency/Organization:	
Telephone #:	Email:	
Release Date:	Release Time:	
<p>Authorization: You and your resources are in the process of being released from the incident. Resources are not released until the checked boxes below have been signed off by the appropriate overhead personnel and Demobilization Unit Leader (DMOB) or Planning Section representative. Include any remarks, as appropriate.</p> <p>Logistics Section:</p> <p><input type="checkbox"/> Supply Unit _____</p> <p><input type="checkbox"/> Facilities Unit _____</p> <p><input type="checkbox"/> Security Manager _____</p> <p><input type="checkbox"/> Ground/Vessel Support Unit _____</p> <p><input type="checkbox"/> Communications Unit _____</p> <p><input type="checkbox"/> Medical Unit _____</p> <p><input type="checkbox"/> _____</p> <p>Finance Section:</p> <p><input type="checkbox"/> Time Unit _____</p> <p><input type="checkbox"/> _____</p> <p>Other ICS Sections/Staff:</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p>		
Destination:	Method of Transportation:	Hotel Arrangements:
Manifest #:	Estimated Departure Time:	Estimated Arrival Time:
Contact Information While Traveling:		Emergency Contact:
Signature of Released Individual, Crew Leader, or Equipment Owner:		
Attach Performance Ratings (ICS-225), if available.		
Prepared By (PSC/DMOB):	ICS Position/Assignment:	Preparation Date/Time:

Demobilization Unit Leader (DMOB)

Tentative Release List (ICS-236)

Incident Name:	Operational Period (start):	Operational Period (end):
From:		ICS Position:
To:		ICS Position (PSC/DMOB):
The following resources are surplus as of _____ (hours) on _____ (date). At that time, these resources are available for release processing.		
#	Name of Individual, Crew, or Equipment in Excess	Position on Incident
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		
20.		
21.		
22.		
23.		
Signature of Section Chief/Command Staff Officer:		
Prepared By (PSC/DMOB):	ICS Position/Assignment:	Preparation Date/Time:

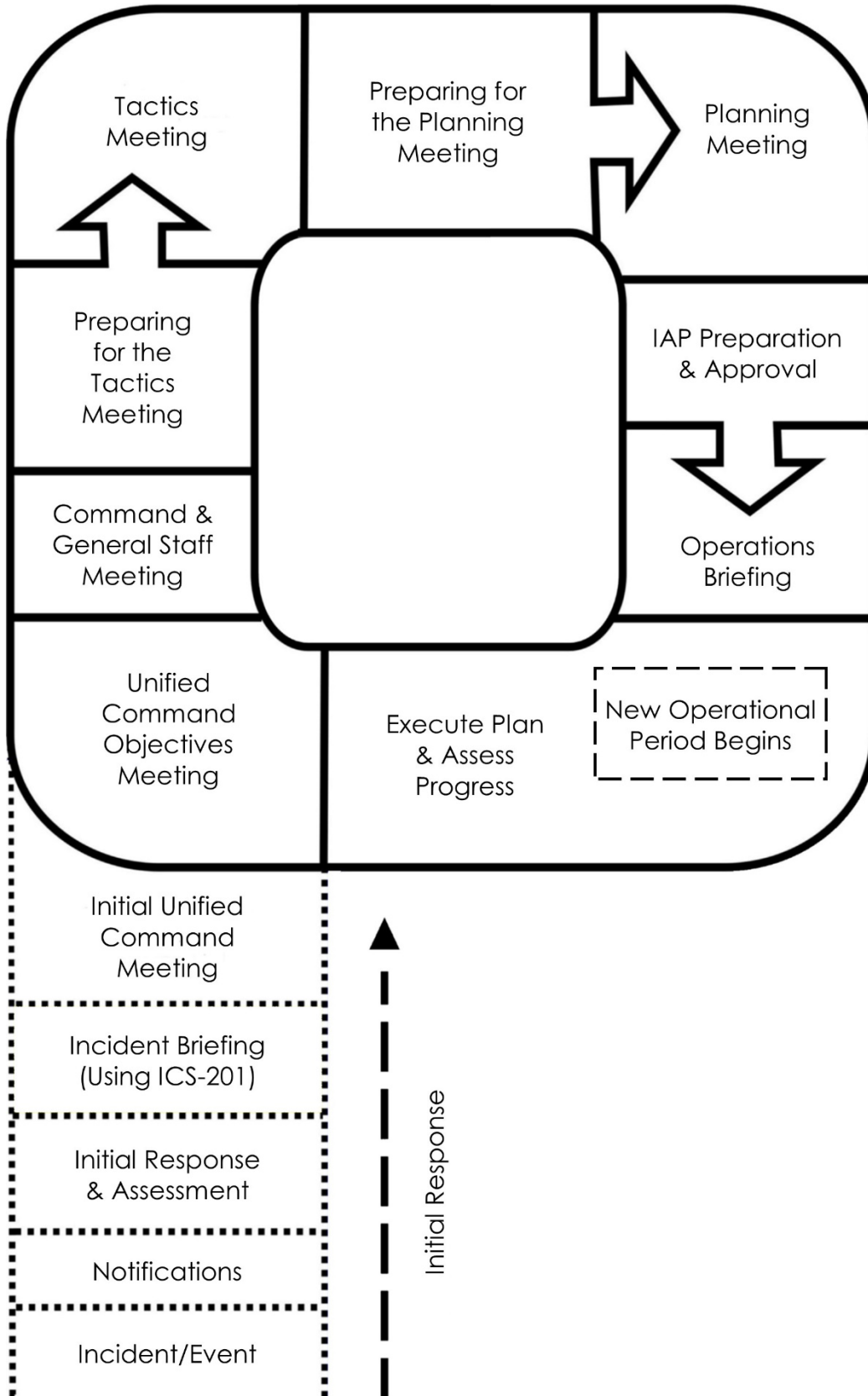
Meetings & Briefings



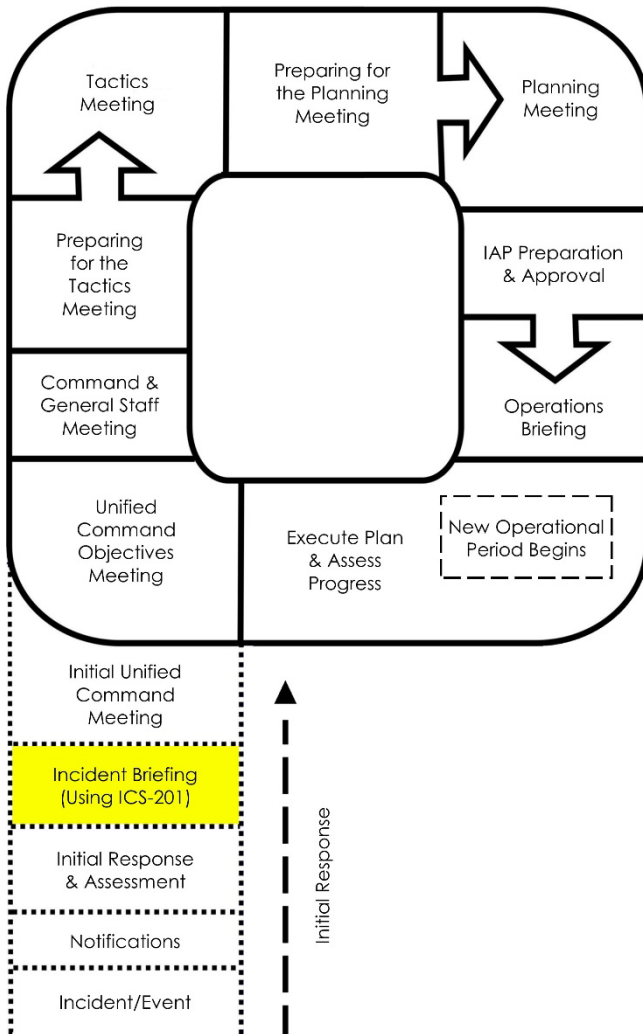
The Demobilization Unit Leader (DMOB) is responsible for attending the following meetings/briefings:

- Incident Briefing.
- Planning Section “Family Meeting”.
- Operations Briefing.

Planning "P"



Incident Briefing



Overview: The Incident Briefing provides incident management personnel, including Unified Command (UC) officials, with basic information regarding the incident situation and resources allocated to the response. It serves as an opportunity for members of the Command & General Staff to receive additional details regarding their assignment.

Schedule: The Incident Briefing originates during the transfer-of-command process, but may also be scheduled periodically to assess the status of current response activities or serve as an orientation for newly assigned individuals in the ICS organization.

Facilitator: Planning Section Chief (PSC).

Attendees:

- Federal OSC.
- State OSC.
- Local OSC.
- Incident Commander (RPIC).
- Safety Officer (SOFR).
- Public Information Officer (PIO).
- Liaison Officer (LOFR).
- Operations Section Chief (OSC).
- Branch Directors (OPBDs).
- Planning Section Chief (PSC).
- Logistics Section Chief (LSC).
- Finance Section Chief (FSC).
- Unit Leaders.
- Agency Representatives (AREPs).
- OSRO Representatives.
- Technical Specialists (THSPs).

Duration: Approximately 30 minutes.

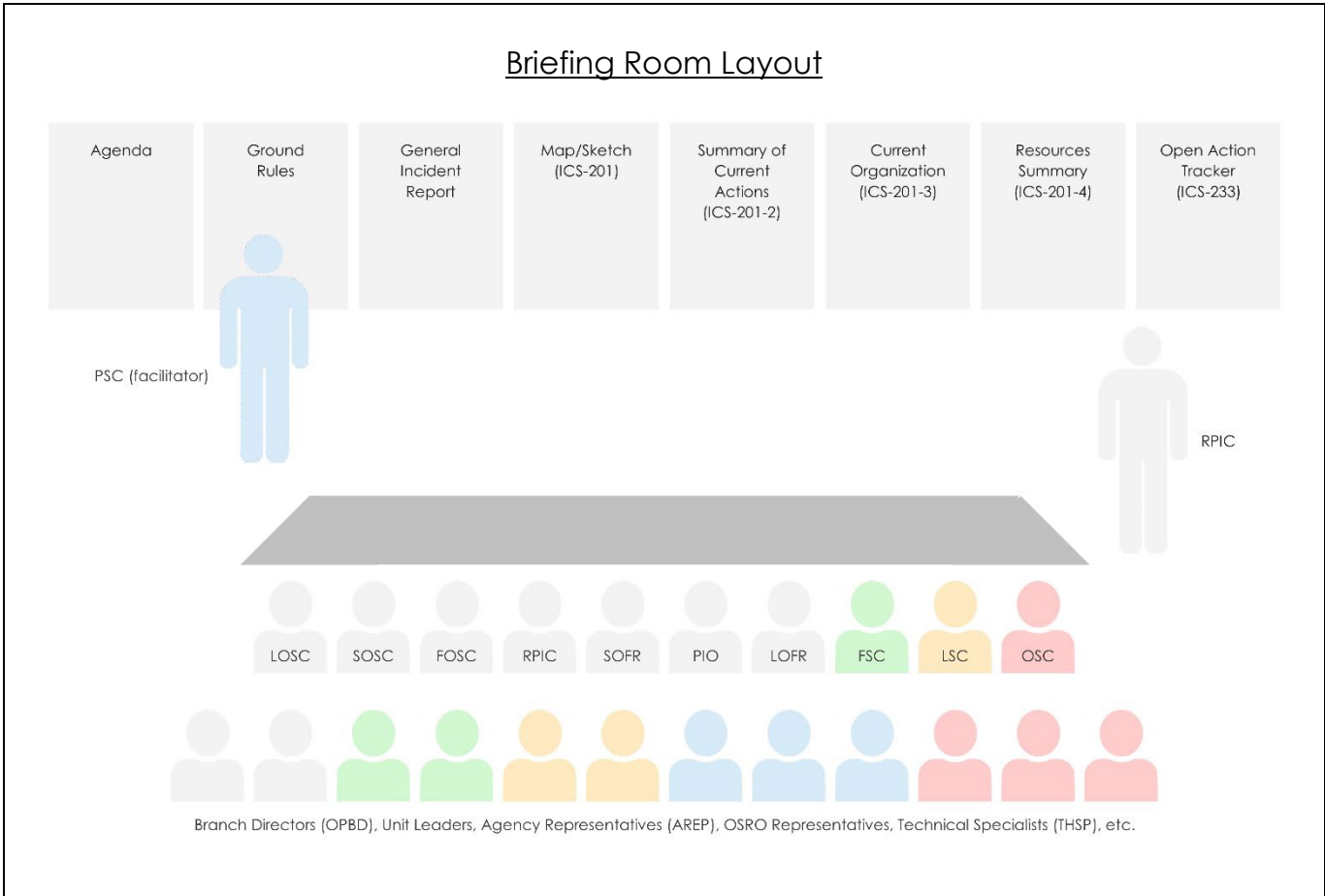
Incident Briefing (Cont'd)

Planning Responsibilities:

- Facilitate the briefing.
- If possible, provide a copy of the Incident Briefing (ICS-201) forms to attendees.
- Document discussion points, concerns, and open action items.

Incident Briefing (Cont'd)

The recommended room layout and seating arrangement for the Incident Briefing is illustrated below:



Incident Briefing (Cont'd)

Agenda

The relatively informal briefing generally lacks an established agenda, with the exception of following the format of the Incident Briefing (ICS-201) forms.

1. Planning Section Chief (PSC): Bring the meeting to order, by stating "Good morning/afternoon. It's [time and date] and I'd like to call the Incident Briefing to order."
2. Planning Section Chief (PSC): Conduct roll call for the various ICS positions/functions listed on page 76.
3. Planning Section Chief (PSC): Announce ground rules, as follows:
 - Silence all electronic devices.
 - Respect the meeting agenda.
 - Be mindful of time.
 - Presenters front and center.
 - Limit interruptions and side conversations.
 - Table discussions unrelated to the meeting.
4. Planning Section Chief (PSC): Briefly review the agenda, noting the purpose of the meeting is to provide incident management personnel, including Unified Command (UC) officials, with basic information regarding the incident situation and resources allocated to the response.
5. Planning Section Chief (PSC): Confirm the Documentation Unit is taking meeting minutes and tracking action items that could potentially arise during the meeting, using Meeting Summary (ICS-231) and Open Action Tracker (ICS-233), respectively.
6. Planning Section Chief (PSC): Distribute hard-copy printouts, if available, of the completed Incident Briefing (ICS-201) forms to meeting attendees. Indicate these forms will be frequently referenced during the briefing to communicate incident details and highlight specific issues.
7. Planning Section Chief (PSC): Acknowledge the "formal name" of the incident, if established.

Incident Briefing (Cont'd)

Agenda (Cont'd)

8. Planning Section Chief (PSC): Invite the Responsible Party Incident Commander (RPIC) to the podium to deliver specifics and details regarding the incident.
9. Responsible Party Incident Commander (RPIC):
 - Provide a brief historical overview/analysis of the incident. Note the date, time, and origin of the discharge, along with the type and estimated volume of spilled product. Illustrate the incident perimeter and spill trajectory, using Map/Sketch (ICS-201-1). Refrain from speculating on the potential cause, if unknown.
 - Indicate whether there are any injuries/casualties associated with the incident. Address potential exposures, environmental vulnerabilities, road closures, etc.
 - Note corrective actions, e.g., source control, valve closure, spill containment, oil recovery, etc., taken in response to the scenario.
 - Review/analyze current and forecasted weather conditions.
 - Verify completed notifications (both internal and external), using Spill Notification Log as a reference.
 - Specify the locations of established incident facilities, including the Incident Command Post (ICP) and Staging Area, by referencing Map/Sketch (ICS-201-1).
 - Define incident objectives and priorities. Customize the “generalized” objectives on the Summary of Current Actions (ICS-201-2) form, by adding specifics as verbal tasking is provided to response managers and contractors.
 - Outline current and planned actions/tactics, using Summary of Current Actions (ICS-201-2) as a template. Acknowledge tasks expected to be completed before the start of the next operational period.

Incident Briefing (Cont'd)

Agenda (Cont'd)

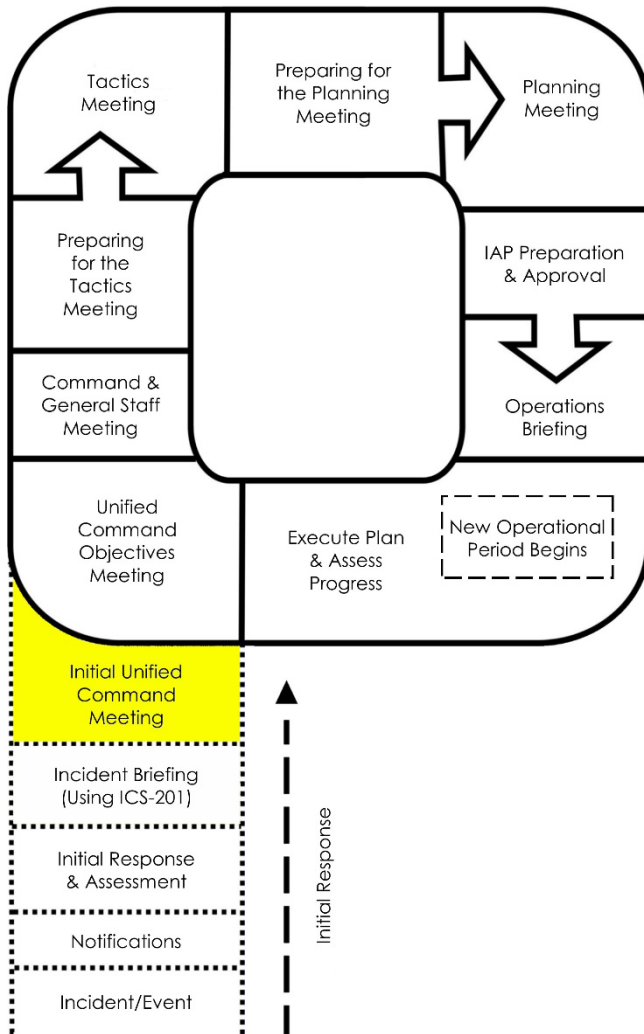
9. Responsible Party Incident Commander (RPIC) (Cont'd):
 - Review the current on-scene organizational structure and personnel assignments, by referencing Current Organization (ICS-201-3). Note establishment of any operational Branches/Divisions/Groups. Confirm adequate span-of-control is provided.
 - Note agencies and jurisdictions involved in the incident.
 - Document resource assignments and how they are being used in support of operational activities, with the aid of Resources Summary (ICS-201-4). Further note resources ordered and/or enroute.
 - Discuss methods of communication, including radio frequency/channel assignments, using Incident Radio Communications Plan (ICS-205) as a reference. Review/propose a communications schedule for supervisors and managers assigned to Operations functions.
 - Detail procedural instructions for requesting/ordering additional resources. Adopt the standardized Resources Request (ICS-213-RR) form to solicit equipment, supplies, and services.
 - Review safety considerations and concerns. Highlight any near-misses or injuries requiring medical attention, with help from the Safety Officer (SOFR).
 - Consider incident complexity, along with any political, news media, environmental, and economic influences/constraints.
 - Summarize the briefing with an overall assessment of the incident's potential. Reinforce objectives and priorities.
10. Planning Section Chief (PSC): Announce the duration of the "emergency/reactive" phase and schedule for transitioning into the "proactive" mode of the ICS Operational Period Planning Cycle, based on the magnitude/complexity of the incident and upon assuring sufficient Incident Management Team (IMT) staffing is available.

Incident Briefing (Cont'd)

Agenda (Cont'd)

11. Planning Section Chief (PSC): Facilitate an open, "round-robin"-style discussion to clarify objectives, priorities, assignments, specific job responsibilities, issues, concerns, and open actions/tasks, using Open Action Tracker (ICS-233).
12. Responsible Party Incident Commander (RPIC): Offer words of encouragement. Recognize sacrifices and contributions. Emphasize safety and teamwork.
13. Planning Section Chief (PSC): Adjourn briefing.

Initial Unified Command Meeting



Overview: The Initial Unified Command Meeting provides Unified Command (UC) officials with an opportunity to discuss and concur on important issues and formulate key decisions prior to joint incident action planning. This meeting typically sets the tone for the overall response.

Schedule: The Initial Unified Command Meeting is scheduled as agency representatives integrate into the Unified Command (UC) response organization, typically upon conclusion of the Incident Briefing.

Facilitator: Planning Section Chief (PSC).

Attendees:

- Federal OSC.
- State OSC.
- Local OSC.
- Incident Commander (RPIC).
- Planning Section Chief (PSC).
- Documentation Unit Leader (DOCL).

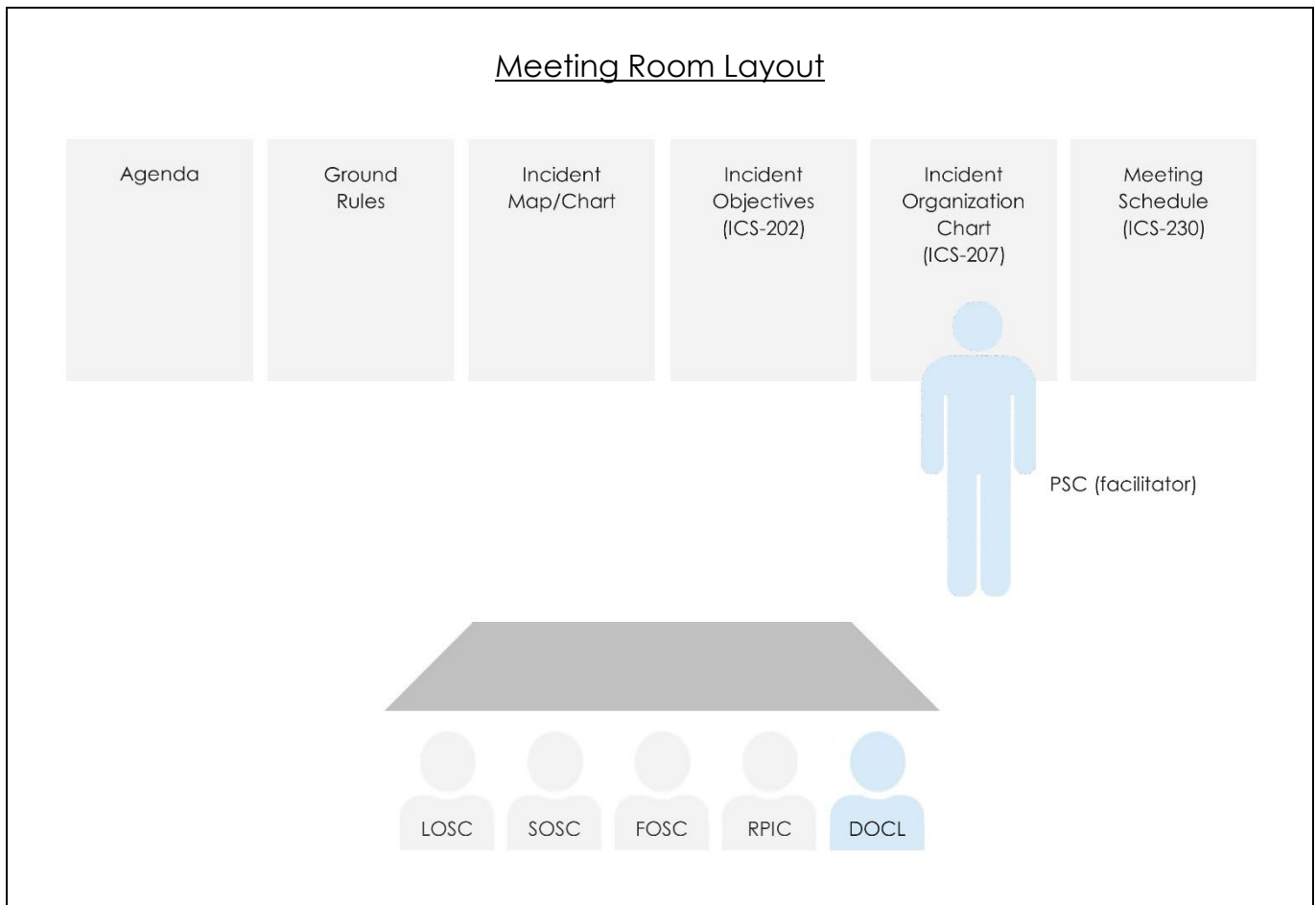
Duration: Approximately 60 minutes.

Planning Responsibilities:

- Set up meeting room.
- Facilitate the meeting.
- Come away from the meeting with a good set of objectives and priorities.
- Document decisions, along with limitations and constraints (or assign this responsibility to the Documentation Unit Leader (DOCL)).

Initial Unified Command Meeting (Cont'd)

The recommended room layout and seating arrangement for the Initial Unified Command Meeting is illustrated below:



Initial Unified Command Meeting (Cont'd)

Agenda

1. Planning Section Chief (PSC): Bring the meeting to order, by stating “Good morning/afternoon. It’s [time and date] and I’d like to call the Initial Unified Command Meeting to order.”
2. Planning Section Chief (PSC): Conduct roll call for the various ICS positions/functions listed on page 83.
3. Planning Section Chief (PSC): Announce ground rules, as follows:
 - Silence all electronic devices.
 - Respect the meeting agenda.
 - Be mindful of time.
 - Presenters front and center.
 - Limit interruptions and side conversations.
 - Table discussions unrelated to the meeting.
4. Planning Section Chief (PSC): Briefly review the agenda, noting the purpose of the meeting is to provide Unified Command (UC) officials with an opportunity to discuss and concur on important issues and formulate key decisions prior to joint incident action planning.
5. Planning Section Chief (PSC): Confirm the Documentation Unit is taking meeting minutes and tracking action items that could potentially arise during the meeting, using Meeting Summary (ICS-231) and Open Action Tracker (ICS-233), respectively.
6. Planning Section Chief (PSC): Validate makeup of the newly formed Unified Command (UC), which may include representatives from leading federal, state, and local agencies, together with the Responsible Party (RP).
7. Unified Command (UC):
 - Confirm representatives in attendance have the proper Delegation of Authority from their respective agencies/organizations.
 - Clarify Unified Command (UC) roles and responsibilities. Discuss means of supporting the incident. Identify jurisdictional boundaries and focus.

Initial Unified Command Meeting (Cont'd)

Agenda (Cont'd)

7. Unified Command (UC) (Cont'd):

- Review/fine-tune incident objectives, specifically designed to provide focus to the response organization (refer to examples on pages 88-89).
- Establish/document potential limitations and constraints (refer to examples on page 90), using ICS-202a.
- Agree on response priorities (refer to examples on page 91). Document on Command Direction (ICS-202a).
- Determine specific informational thresholds for which Command requires immediate notification (refer to example critical information requirements on page 92). Use ICS-202b for documentation purposes.
- Outline a basic ICS organizational structure, using Incident Organization Chart (ICS-207) as a guide.
- Consider Command Staff assignments. Designate the lead organization/agency for the Safety Officer (SOFR), Public Information Officer (PIO), and Liaison Officer (LOFR).
- Nominate the best-qualified Operations Section Chief (OSC) and Deputy, based on makeup of the Unified Command (UC).
- Agree on key General Staff personnel assignments in the Planning, Logistics, and Finance Sections. Assign Section Chiefs, Deputies, Unit Leaders, and Technical Specialists (THSPs), as needed.
- Discuss the integration of assisting/cooperating agencies and organizations into the ICS organization.
- Compose a list of potential stakeholders, e.g., elected officials, emergency managers, scientific researchers, environmental organizations, special interest groups, community residents, local businesses, landowners, etc., which may be affected by the incident.

Initial Unified Command Meeting (Cont'd)

Agenda (Cont'd)

7. Unified Command (UC) (Cont'd):

- Suggest (and agree on) a “formal name” for the incident.
- Determine the length of the operational period (start/end times) and work shift hours. Draft a Meeting Schedule (ICS-230).
- Propose locations for the Incident Command Post (ICP) and other critical support facilities, e.g., Staging Areas.
- Set policies for interacting with the news media and disseminating incident-related information (both internally and externally). Assess the need to establish a Joint Information Center (JIC). Designate a sole individual to serve as spokesperson for the Unified Command (UC), hence commit to speak with “one voice” through the JIC, if established.
- Acknowledge sensitive information, intelligence, and operational security matters.
- Discuss resource ordering, cost accounting, and cost-sharing procedures.
- Summarize and document key decisions. Determine key action items and functional tasks to be assigned to members of the Command & General Staff, using Open Action Tracker (ICS-233) for recording purposes.

8. Planning Section Chief (PSC): Adjourn meeting.

Example Incident Objectives

Incident Management

- Manage a coordinated inter-agency response effort that reflects composition of the Unified Command (UC).
- Establish an Incident Management Team (IMT) capable of meeting the initial and long-term challenges required for incident mitigation.
- Inform the public, stakeholders, and news media of response activities.
- Implement a coordinated response with law enforcement and other responding agencies.
- Evaluate planned actions to determine potential impacts on social, political, and economic entities.
- Establish a Volunteer Management Program.
- Adhere to appropriate financial accounting practices.
- Establish resource request and ordering procedures.
- Establish an incident documentation system.
- Establish an information transfer process to facilitate communications with stakeholders and organizations.

Oil Spill

- Initiate actions to stop/control the release and minimize the total spill volume.
- Implement measures to isolate, contain, and stabilize the incident.
- Examine the fate, effects, and trajectories of oil/hazardous substances.
- Identify sensitive areas.
- Develop protection strategies.
- Conduct pre-impact shoreline debris removal.
- Contain, treat, and recover spilled materials.
- Conduct shoreline assessments and initiate cleanup efforts.

Safety

- Maximize the protection of public health and welfare.
- Provide for the safety and security of responders.
- Conduct an operational risk assessment; ensure controls are in place to protect responders and the public.

Example Incident Objectives (Cont'd)

Security

- Implement security awareness measures.
- Evaluate changes in incident effects and response conditions.
- Establish an Incident Security Plan, incorporating identification badges.
- Implement scene integrity and evidence preservation measures.
- Investigate the cause of the incident.
- Establish and continue enforcement of safety and security zones.
- Implement airspace closure and monitoring.

Environmental

- Identify and protect environmentally sensitive areas, including wetlands, wildlife habitats, historic properties, archeological sites, etc.
- Identify threatened/endangered species; prepare to rescue and rehabilitate injured wildlife.
- Investigate the potential for alternative response technologies, e.g., in-situ burning, bioremediation, etc., in support of response efforts.

Firefighting

- Commence firefighting operations to contain, extinguish, and overhaul fire.
- Coordinate and support firefighting activities.

Crisis Management

- Maintain business survival.
- Minimize response costs.
- Maintain public image.
- Minimize local economic and tourism impacts.
- Minimize third-party claims.
- Minimize natural resource damage assessments.
- Re-establish commercial operation as soon as possible.
- Minimize prospects of criminal prosecution.
- Meet certain reasonable stakeholder expectations (public, agency, interest group, and political).
- Consider insurance limitations.

Example Limitations & Constraints

- Adverse weather.
- Challenging terrain/topography.
- Limited specialized resources.
- Staffing shortfalls.
- Crew rest requirements.
- Conflicting jurisdictional oversight.
- Delegation of authority.
- Inter-agency communications.
- Costs.
- News media coverage.
- Public confidence/perception.
- Political influences.
- Affected population.
- Adverse environmental/economic impacts.
- Community evacuations.
- Security.
- Evidence preservation.
- Exclusion zones.
- Oil composition.
- PPE requirements.
- Availability of waste receiving areas.
- Command and General Staff composition.

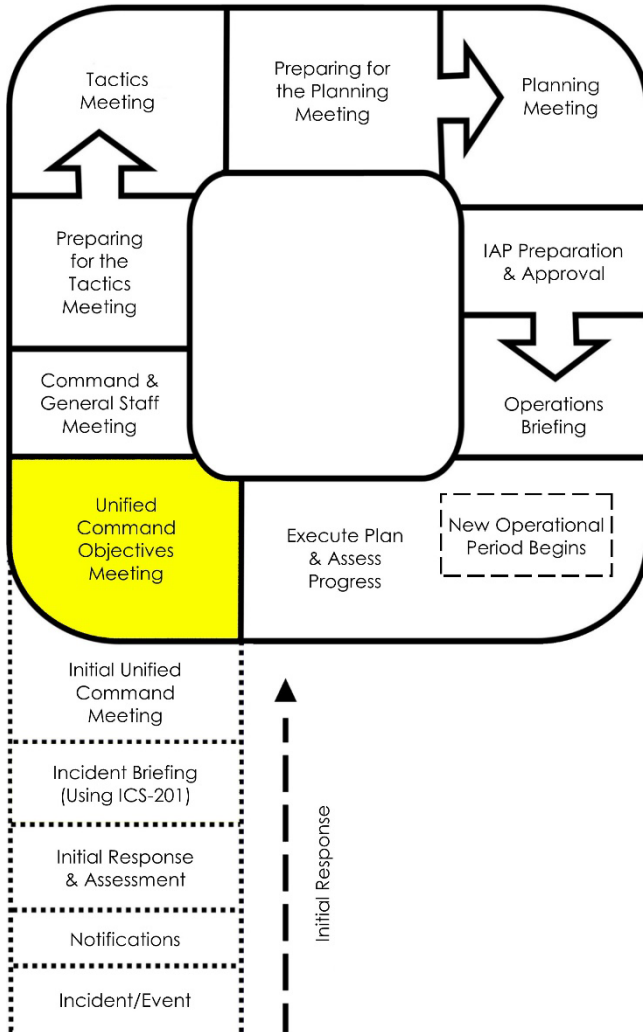
Example Response Priorities

- Responder safety.
- Public health.
- Air monitoring.
- Incident stabilization.
- Source control.
- Environmental/property protection.
- Wildlife rescue/rehabilitation.
- Security.
- Transportation infrastructure.
- Maritime commerce restoration.
- Medical support.
- Stakeholder outreach.
- Media relations.
- Communications.
- Information management.
- Situational awareness.
- Incident investigation.
- Evidence collection.

Example Critical Information Requirements (CIRs)

- Injuries and/or fatalities.
- Personnel accountability.
- Waterway/port closures.
- Damage to infrastructure or company facilities.
- Equipment malfunctions.
- Total volume of the spill or rate of discharge.
- Resources status.
- Operational asset tracking.
- Environmental impacts.
- Resources at risk.
- Oiled wildlife.
- Cultural/historical impacts.
- News media interests/concerns.
- Social media trends.
- Political interests/concerns.
- Stakeholder concerns.

Unified Command Objectives Meeting



Overview: The Unified Command Objectives Meeting provides Unified Command (UC) officials with an opportunity to assess progress, hence review, identify, and prioritize objectives for the next operational period. Decisions and directions from this meeting are communicated to the entire incident response organization during the subsequent Command & General Staff Meeting.

Schedule: The Unified Command Objectives Meeting is typically scheduled during the early morning hours at the onset of the operational period, prior to the Command & General Staff Meeting.

Facilitator: Planning Section Chief (PSC).

Attendees:

- Federal OSC.
- State OSC.
- Local OSC.
- Incident Commander (RPIC).
- Planning Section Chief (PSC).
- Documentation Unit Leader (DOCL).

Duration: 30 to 60 minutes.

Planning Responsibilities:

- Set up meeting room.
- Facilitate the meeting.

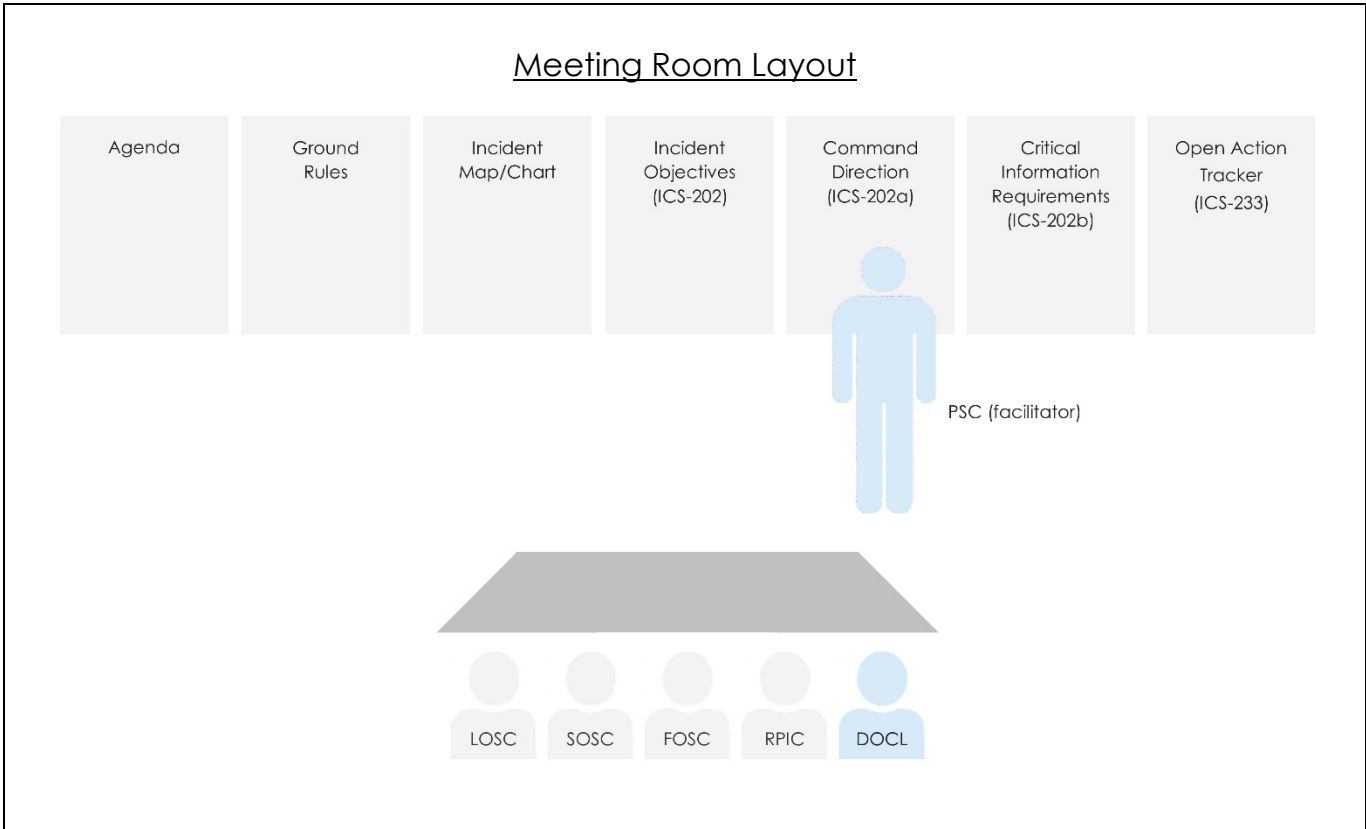
Unified Command Objectives Meeting (Cont'd)

Planning Responsibilities (Cont'd):

- Take notes on the Unified Commanders' decisions and tasking (or assign this responsibility to the Documentation Unit Leader (DOCL)).
- Provide an update on any open action items.
- Distribute and post decisions.

Unified Command Objectives Meeting (Cont'd)

The recommended room layout and seating arrangement for the Unified Command Objectives Meeting is illustrated below:



Unified Command Objectives Meeting (Cont'd)

Agenda

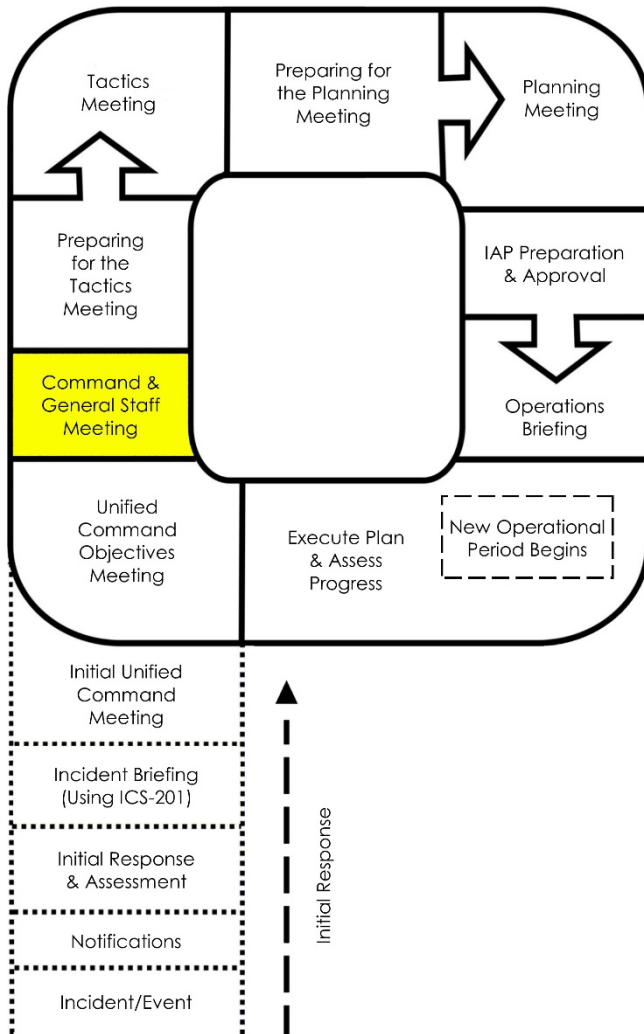
1. Planning Section Chief (PSC): Bring the meeting to order, by stating "Good morning/afternoon. It's [time and date] and I'd like to call the Unified Command Objectives Meeting to order."
2. Planning Section Chief (PSC): Conduct roll call for the various ICS positions/functions listed on page 93.
3. Planning Section Chief (PSC): Announce ground rules, as follows:
 - Silence all electronic devices.
 - Respect the meeting agenda.
 - Be mindful of time.
 - Presenters front and center.
 - Limit interruptions and side conversations.
 - Table discussions unrelated to the meeting.
4. Planning Section Chief (PSC): Briefly review the agenda, noting the purpose of the meeting is to with provide Unified Command (UC) officials with an opportunity to assess progress, hence review, identify, and prioritize objectives for the next operational period.
5. Planning Section Chief (PSC): Confirm the Documentation Unit is taking meeting minutes and tracking action items that could potentially arise during the meeting, using Meeting Summary (ICS-231) and Open Action Tracker (ICS-233), respectively.
6. Unified Command (UC):
 - Review/adjust incident objectives. Make any changes on ICS-202.
 - Validate previous decisions, priorities, and procedures, as documented on Command Direction (ICS-202a).
 - Analyze critical information requirements (CIRs) (ICS-202b), information flow, and time-critical expectations.
 - Assign or review/update tasks for members of the Command and General Staff, while referencing ICS-233.

Unified Command Objectives Meeting (Cont'd)

Agenda (Cont'd)

6. Unified Command (UC) (Cont'd):
 - Review any open actions from previous meetings.
 - Prepare for the Command & General Staff Meeting.
7. Planning Section Chief (PSC): Adjourn meeting.

Command & General Staff Meeting



Overview: The Command & General Staff Meeting (oftentimes referred to as the Strategy Meeting) provides an opportunity for Unified Command (UC) officials to meet with the core response organization to discuss the current situation, review incident objectives, set priorities, identify limitations and constraints, address organizational issues, clarify staff roles and responsibilities, and outline expectations. The information discussed in this meeting will set into motion the development of the Incident Action Plan (IAP).

Schedule: The Command & General Staff Meeting is typically scheduled during the mid-morning hours (in a 24-hour operational period), between the Unified Command Objectives Meeting and Tactics Meeting.

Facilitator: Planning Section Chief (PSC).

Attendees:

- Federal OSC.
- State OSC.
- Local OSC.
- Incident Commander (RPIC).
- Safety Officer (SOFR).
- Public Information Officer (PIO).
- Liaison Officer (LOFR).
- Operations Section Chief (OSC).
- Planning Section Chief (PSC).
- Situation Unit Leader (SITL).
- Documentation Unit Leader (DOCL).
- Logistics Section Chief (LSC).
- Finance Section Chief (FSC).

Duration: Approximately 30 minutes.

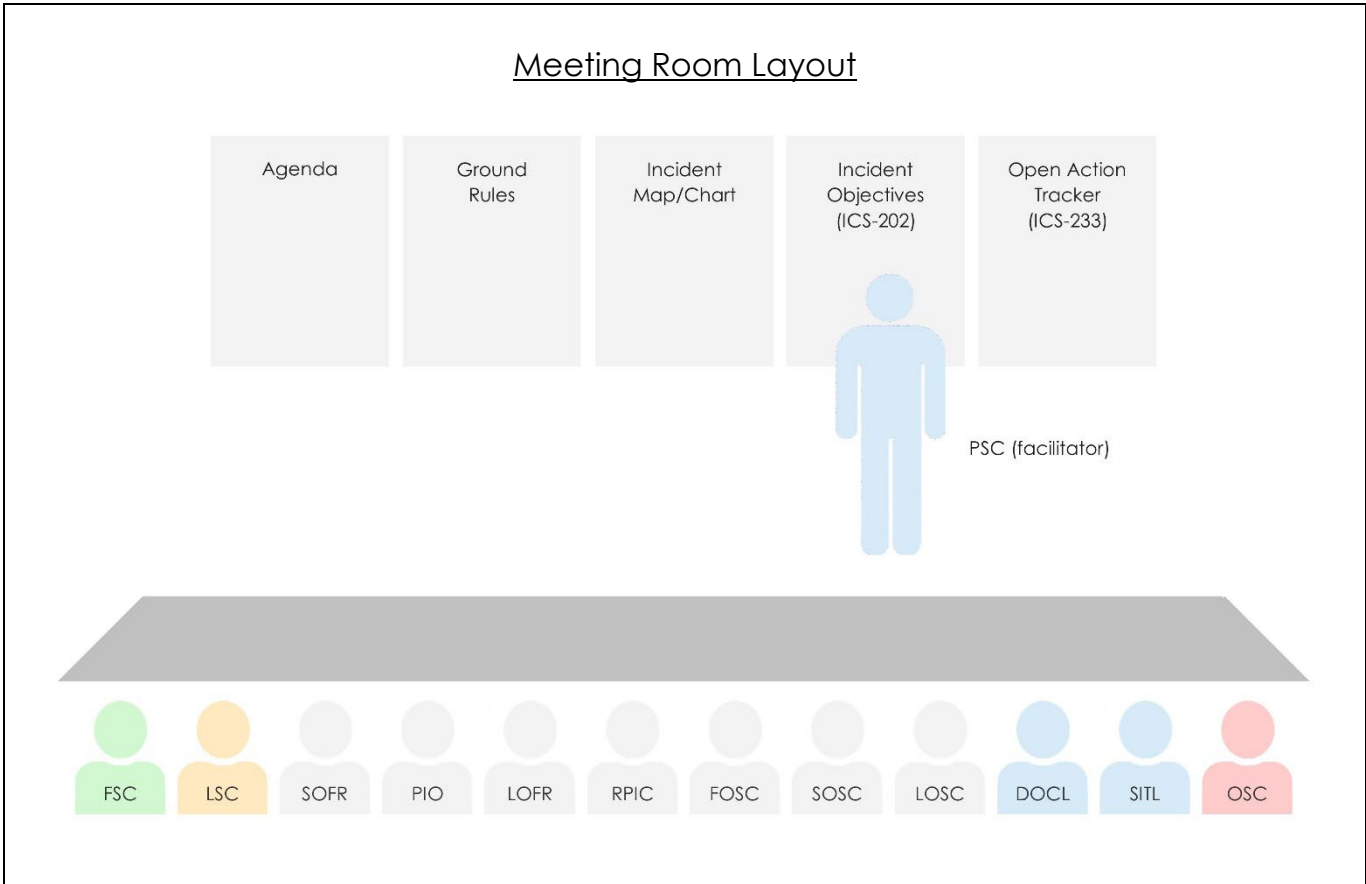
Command & General Staff Meeting (Cont'd)

Planning Responsibilities:

- Schedule the meeting about 15 minutes upon conclusion of the Initial Unified Command Meeting/Unified Command Objectives Meeting.
- Set up meeting room.
- Project (or distribute) copies of Incident Objectives (ICS-202), Command Direction (ICS-202a), Critical Information Reporting (CIR) Requirements (ICS-202b), and Meeting Schedule (ICS-230).
- Facilitate the meeting. Be flexible with the agenda, based on Unified Command's needs.
- Document work tasks; note who is responsible for completing them.
- Resolve potential conflicts.
- Clarify roles and responsibilities before the meeting is adjourned.

Command & General Staff Meeting (Cont'd)

The recommended room layout and seating arrangement for the Command & General Staff Meeting is illustrated below:



Command & General Staff Meeting (Cont'd)

Agenda

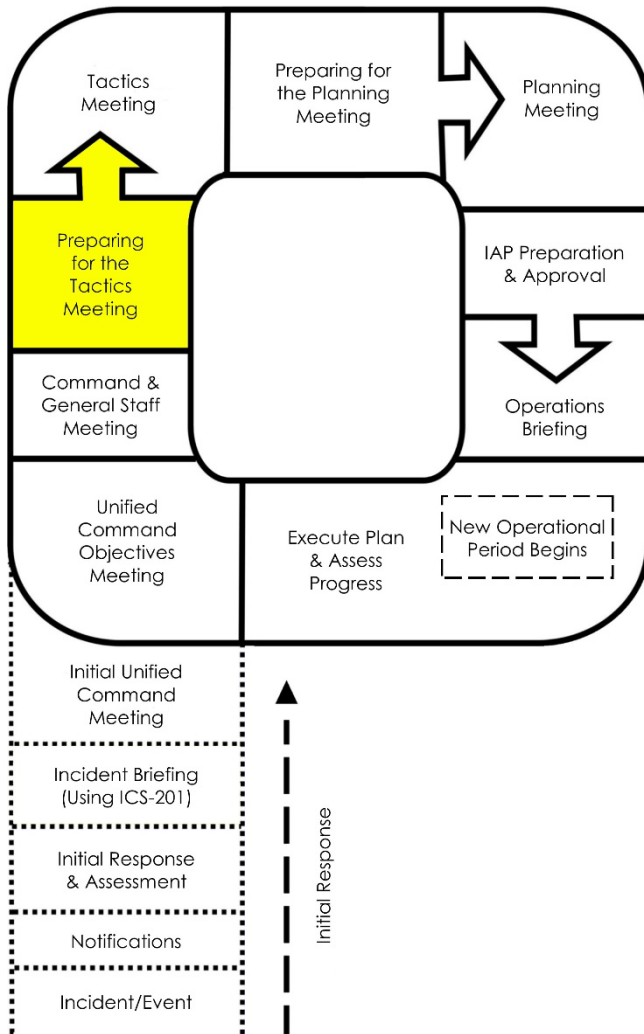
1. Planning Section Chief (PSC): Bring the meeting to order, by stating "Good morning/afternoon. It's [time and date] and I'd like to call the Command & General Staff Meeting to order."
2. Planning Section Chief (PSC): Conduct roll call for the various ICS positions/functions listed on page 98.
3. Planning Section Chief (PSC): Announce ground rules, as follows:
 - Silence all electronic devices.
 - Respect the meeting agenda.
 - Be mindful of time.
 - Presenters front and center.
 - Limit interruptions and side conversations.
 - Table discussions unrelated to the meeting.
4. Planning Section Chief (PSC): Briefly review the agenda, noting the purpose of the meeting is to provide an opportunity for Unified Command (UC) officials to meet with the core response organization to discuss the current situation, review incident objectives, set priorities, identify limitations and constraints, address organizational issues, clarify staff roles and responsibilities, and outline expectations.
5. Planning Section Chief (PSC): Confirm the Documentation Unit is taking meeting minutes and tracking action items that could potentially arise during the meeting, using Meeting Summary (ICS-231) and Open Action Tracker (ICS-233), respectively.
6. Situation Unit Leader (SITL): Provide a brief (less than 3-minute) synopsis of the current and projected incident situation. Highlight recent progress and accomplishments. Review the weather forecast. Use the Situation Map and Incident Status Summary (ICS-209) as references.
7. Safety Officer (SOFR): Issue a quick safety briefing. Highlight Command's focus on responder/public safety. Address procedures in response to any accidents/injuries.

Command & General Staff Meeting (Cont'd)

Agenda (Cont'd)

8. Unified Command (UC):
 - Review incident objectives for the upcoming operational period, as reflected on ICS-202.
 - Outline priorities, limitations, and constraints, along with key decisions and procedures, as recorded on Command Direction (ICS-202a).
 - Communicate critical information requirements (CIRs), information flow, and time-critical expectations (referring to ICS-202b).
 - Assign functional tasks to members of the Command & General Staff. Review any open action items, by referencing ICS-233.
 - Appoint individuals to prepare various elements of the Incident Action Plan (IAP).
 - Illustrate any staffing changes to the ICS organizational structure, using ICS-207. Address both daytime and nighttime shifts.
 - Announce the start time and duration of the next operational period, along with work shift hours.
 - Review the finalized Meeting Schedule (ICS-230). Clarify attendance requirements.
9. Planning Section Chief (PSC): Facilitate an open discussion to clarify priorities, objectives, assignments, specific job responsibilities, issues, concerns, and open actions/tasks.
10. Unified Command (UC): Present closing remarks. Offer words of encouragement, recognize sacrifices and contributions, and emphasize safety and teamwork.
11. Planning Section Chief (PSC): Adjourn meeting.

Preparing for the Tactics Meeting



Overview: During this phase of the Operational Period Planning Cycle, the Operations Section Chief (OSC) and Planning Section Chief (PSC) begin the work of preparing for the upcoming Tactics Meeting.

Planning Responsibilities:

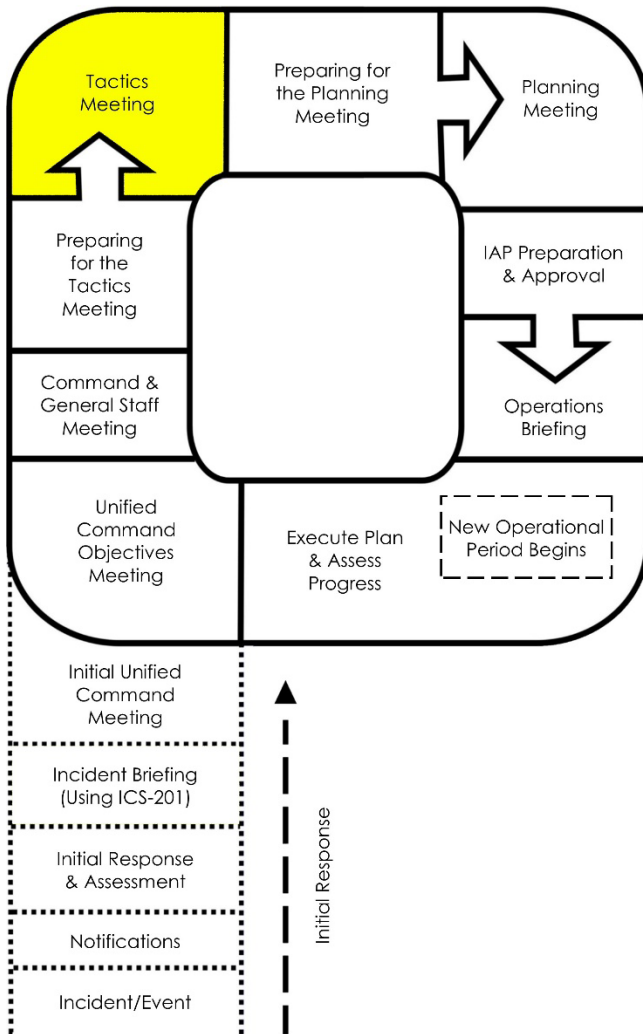
- Conduct a “Family Meeting” with Planning Section staff. Review Command’s direction, along with work expectations for the current (and subsequent) operational periods.
- Check with the Situation and Resource Displays to verify the current status of field efforts, recent observations, and resource utilization. Note any changes in current operations that need to be reviewed during the upcoming Tactics Meeting.
- Meet with the Operations Section Chief (OSC) to discuss strategies (“how” to accomplish the objective) and tactics (equipment and personnel required to implement the strategy). Capture the proposed tactical plan on Work Analysis Matrix (ICS-234).
- Help the Operations Section Chief (OSC) begin filling in Operational Planning Worksheet (ICS-215).
- Ensure the Safety Officer (SOFR) reviews proposed tactics, using ICS-215a.

Preparing for the Tactics Meeting (Cont'd)

Planning Responsibilities (Cont'd):

- Notify participants of meeting location and time.
- Confirm the Operations Section Chief (OSC), Resources Unit Leader (RESL), and Environmental Unit Leader (ENVL) are ready to lay out proposed tactical deployments during the upcoming Tactics Meeting.
- Remind the Situation Unit Leader (SITL) to prepare a brief (less than 3-minute) presentation focused on the next operational period.

Tactics Meeting



Overview: The Tactics Meeting creates the blueprint for tactical deployment during the next operational period and provides an opportunity for incident management personnel to fine-tune objectives, outline recommended strategies, and propose work assignments. The relatively informal meeting, which is typically regarded as the most critical meeting in the ICS planning process, is focused on development of a workable tactical plan that meets Unified Command's (UC's) objectives.

Schedule: The Tactics Meeting is typically scheduled during the late morning/early afternoon hours (in a 24-hour operational period), following the Command & General Staff Meeting and prior to the Planning Meeting.

Facilitator: Planning Section Chief (PSC).

Attendees:

- Safety Officer (SOFR).
- Operations Section Chief (OSC).
- Planning Section Chief (PSC).
- Situation Unit Leader (SITL).
- Resources Unit Leader (RESL).
- Documentation Unit Leader (DOCL).
- Environmental Unit Leader (ENVL).
- Logistics Section Chief (LSC).

Duration: Approximately 30 minutes.

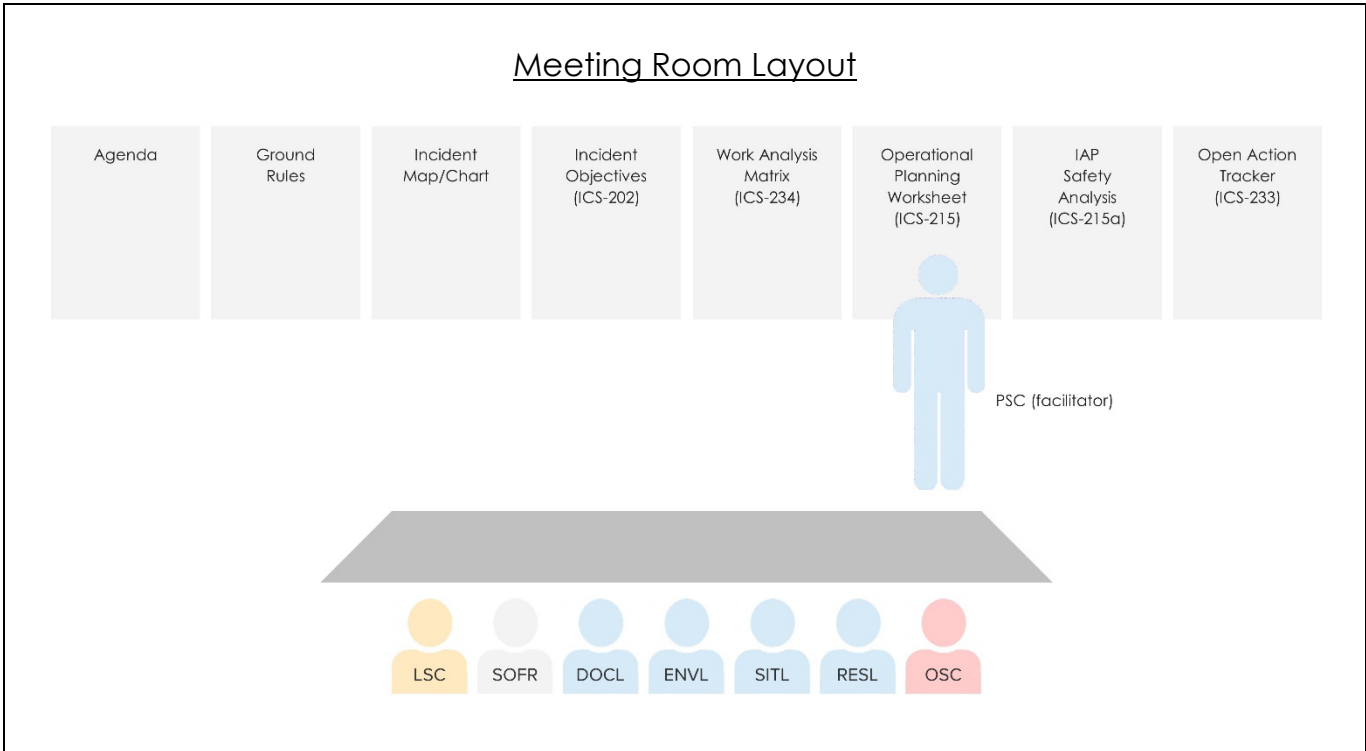
Tactics Meeting (Cont'd)

Planning Responsibilities:

- Set up meeting room.
- Facilitate the meeting.
- Oversee completion of a draft version of Operational Planning Worksheet (ICS-215).
- Review proposed strategies, tactics, and resource requirements.
- Identify resource shortfalls.
- Assure strategies and tactics align with Unified Command's objectives and priorities.
- Mitigate logistics and safety issues.
- Inspect the Operations Section organizational chart.

Tactics Meeting (Cont'd)

The recommended room layout and seating arrangement for the Tactics Meeting is illustrated below:



Tactics Meeting (Cont'd)

Agenda

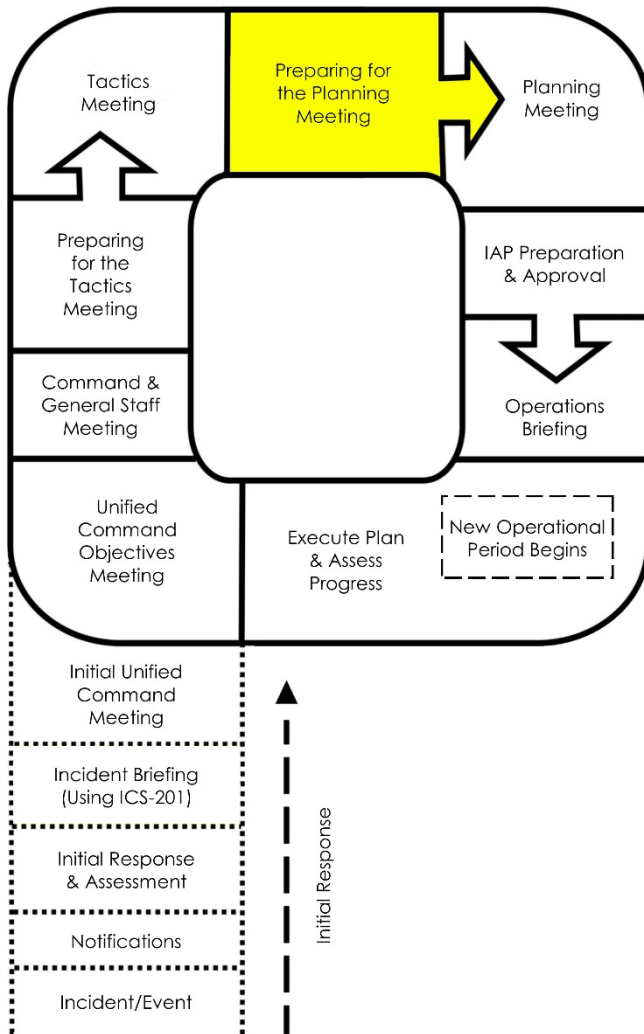
1. Planning Section Chief (PSC): Bring the meeting to order, by stating "Good morning/afternoon. It's [time and date] and I'd like to call the Tactics Meeting to order."
2. Planning Section Chief (PSC): Conduct roll call for the various ICS positions/functions listed on page 105.
3. Planning Section Chief (PSC): Announce ground rules, as follows:
 - Silence all electronic devices.
 - Respect the meeting agenda.
 - Be mindful of time.
 - Presenters front and center.
 - Limit interruptions and side conversations.
 - Table discussions unrelated to the meeting.
4. Planning Section Chief (PSC): Briefly review the agenda, noting the purpose of the meeting is to provide an opportunity for incident management personnel to fine-tune objectives, outline recommended strategies, and propose work assignments.
5. Planning Section Chief (PSC): Confirm the Documentation Unit is taking meeting minutes and tracking action items that could potentially arise during the meeting, using Meeting Summary (ICS-231) and Open Action Tracker (ICS-233), respectively.
6. Situation Unit Leader (SITL): Provide a brief (less than 3-minute) synopsis of the current and projected incident situation. Highlight recent progress and accomplishments. Review the weather forecast. Use the Situation Map and Incident Status Summary (ICS-209) as references.
7. Planning Section Chief (PSC): Review incident objectives for the next operational period, as documented on ICS-202.
8. Operations Section Chief (OSC):
 - Consider potential strategies and tactics for each "operational" objective, while simultaneously filling out Work Analysis Matrix (ICS-234).

Tactics Meeting (Cont'd)

Agenda (Cont'd)

8. Operations Section Chief (OSC) (Cont'd):
 - Prepare (or revise) a draft version of Operational Planning Worksheet (ICS-215). Address proposed work assignments, resource needs/commitments, reporting times/locations, logistical/financial constraints, contingencies, support facilities (Staging Areas), etc. for the next operational period.
 - Update the Operations Section organization chart. Illustrate how span-of-control will be maintained through the establishment of Branches, Groups, and Divisions.
9. Planning Section Chief (PSC): Validate connectivity of tactics and "operational" objectives.
10. Resources Unit Leader (RESL): Assess resource needs. Communicate gaps in resources available versus resources required. Identify any surplus resources potentially ready for demobilization.
11. Safety Officer (SOFR): Evaluate potential critical safety issues, hazards, and risks associated with proposed strategies and tactics; hence propose recommended safety controls and mitigations. Complete IAP Safety Analysis (ICS-215a) as part of the evaluation.
12. Environmental Unit Leader (ENVL): Identify potential environmental issues associated with proposed strategies and tactics. Confirm whether any necessary permits or approvals have been secured.
13. Logistics Section Chief (LSC): Discuss/resolve any logistical issues relating to supply, staffing, communications, food, sanitation, transportation, security, medical, etc.
14. Planning Section Chief (PSC): Validate responsibility for any open actions and/or functional tasks, by reviewing Open Action Tracker (ICS-233).
15. Planning Section Chief (PSC): Adjourn meeting.

Preparing for the Planning Meeting



Overview: During this phase of the Operational Period Planning Cycle, the Command and General Staff prepare for the upcoming Planning Meeting.

Planning Responsibilities:

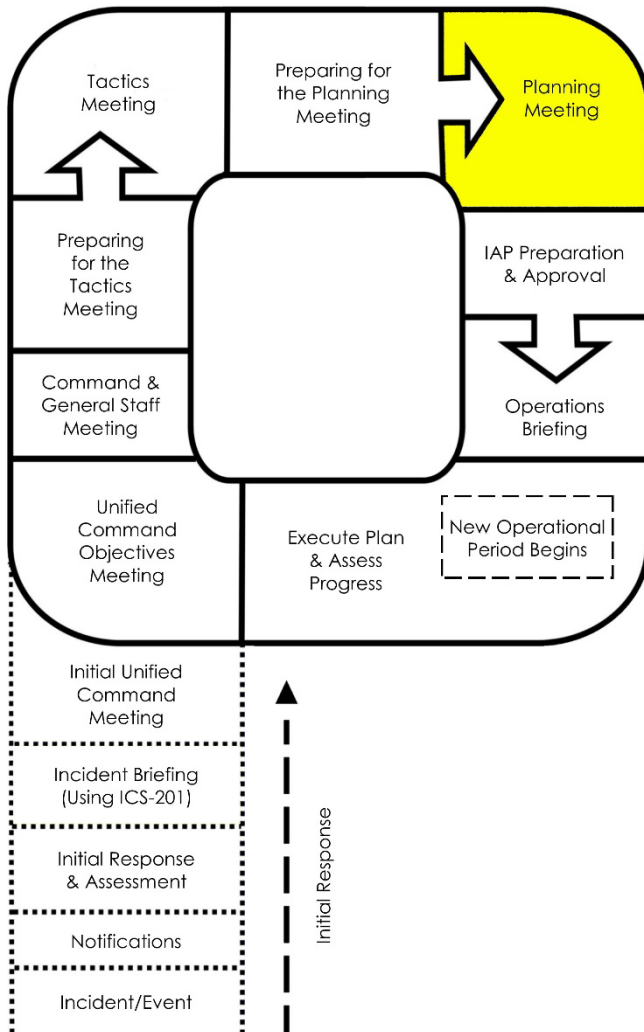
- Check with the Situation and Resource Displays to verify the current status of field efforts, recent observations, and resource utilization. Note any changes in current operations that need to be reviewed during the upcoming Tactics Meeting.
- Talk to participants who will be at the Planning Meeting to determine if there are any “hot” issues that may come up. Verify they are prepared to discuss them.
- Clean up and ready Operational Planning Worksheet (ICS-215) for presentation at the Planning Meeting. Make hard copies available for meeting attendees.
- Provide a copy of Operational Planning Worksheet (ICS-215) to the Logistics Section Chief (LSC) for review.
- Confirm the Situation Unit Leader (SITL) is prepared to brief.
- Confer with field personnel to determine the status of planned actions for the present operational period.

Preparing for the Planning Meeting (Cont'd)

Planning Responsibilities (Cont'd):

- Notify participants of meeting location and time.
- Confirm the availability of the Unified Command to attend the Planning Meeting. If a delay is necessary, determine the new time and notify all potential participants.

Planning Meeting



Overview: The Planning Meeting provides an overview of the proposed tactical plan, based on Unified Command's (UC's) priorities and objectives, for the next operational period. The meeting serves as an opportunity for the Command and General Staff, as well as other incident management personnel, agency officials, and cooperating organizations, to comment on the proposed plan, hence discuss and resolve any outstanding issues before assembling the Incident Action Plan (IAP).

Schedule: The Planning Meeting is typically scheduled during the mid-afternoon hours (in a 24-hour operational period), following the Tactics Meeting and prior to preparation and finalization of the Incident Action Plan (IAP).

Facilitator: Planning Section Chief (PSC).

Attendees:

- Federal OSC.
- State OSC.
- Local OSC.
- Incident Commander (RPIC).
- Safety Officer (SOFR).
- Public Information Officer (PIO).
- Liaison Officer (LOFR).
- Operations Section Chief (OSC).
- Planning Section Chief (PSC).
- Situation Unit Leader (SITL).
- Resources Unit Leader (RESL).
- Documentation Unit Leader (DOCL).
- Environmental Unit Leader (ENVL).
- Technical Specialists (THSPs).
- Logistics Section Chief (LSC).

Planning Meeting (Cont'd)

Attendees (Cont'd):

- Communications Unit Leader (COML).
- Finance Section Chief (FSC).

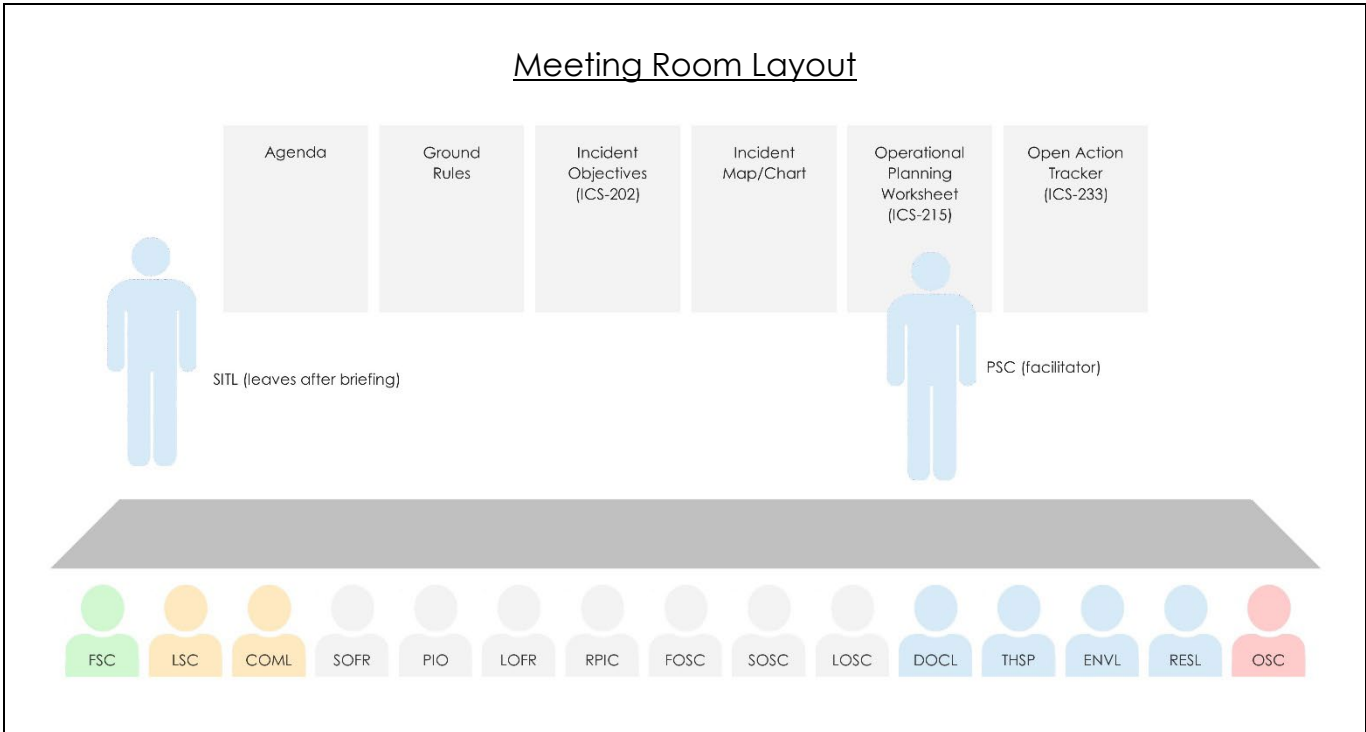
Duration: 30 to 45 minutes.

Planning Responsibilities:

- Set up meeting room.
- Facilitate the meeting.
- Put the final touches on Operational Planning Worksheet (ICS-215).
- Receive tentative approval of the plan from the Unified Command (UC).
- Obtain concurrence from the Command & General Staff that they can support the plan.
- Confirm the availability of resources.
- Document decisions and any tasking by the Incident Commander (IC)/Unified Command (UC).

Planning Meeting (Cont'd)

The recommended room layout and seating arrangement for the Planning Meeting is illustrated below:



Planning Meeting (Cont'd)

Agenda

1. Planning Section Chief (PSC): Bring the meeting to order, by stating "Good morning/afternoon. It's [time and date] and I'd like to call the Planning Meeting to order."
2. Planning Section Chief (PSC): Conduct roll call for the various ICS positions/functions listed on pages 112-113.
3. Planning Section Chief (PSC): Announce ground rules, as follows:
 - Silence all electronic devices.
 - Respect the meeting agenda.
 - Be mindful of time.
 - Presenters front and center.
 - Limit interruptions and side conversations.
 - Table discussions unrelated to the meeting.
4. Planning Section Chief (PSC): Briefly review the agenda, noting the purpose of the meeting is to provide an overview of the proposed tactical plan, based on Unified Command's (UC's) priorities and objectives, for the next operational period.
5. Planning Section Chief (PSC): Confirm the Documentation Unit is taking meeting minutes and tracking action items that could potentially arise during the meeting, using Meeting Summary (ICS-231) and Open Action Tracker (ICS-233), respectively.
6. Unified Command (UC): Present opening remarks. Offer words of encouragement, while emphasizing safety and teamwork.
7. Situation Unit Leader (SITL): Provide a brief (less than 3-minute) synopsis of the current and projected incident situation. Highlight recent progress and accomplishments. Review the weather forecast. Use the Situation Map and Incident Status Summary (ICS-209) as references.
8. Safety Officer (SOFR): Issue a quick safety briefing. Highlight Command's focus on responder/public safety. Address procedures in response to any accidents/injuries.

Planning Meeting (Cont'd)

Agenda (Cont'd)

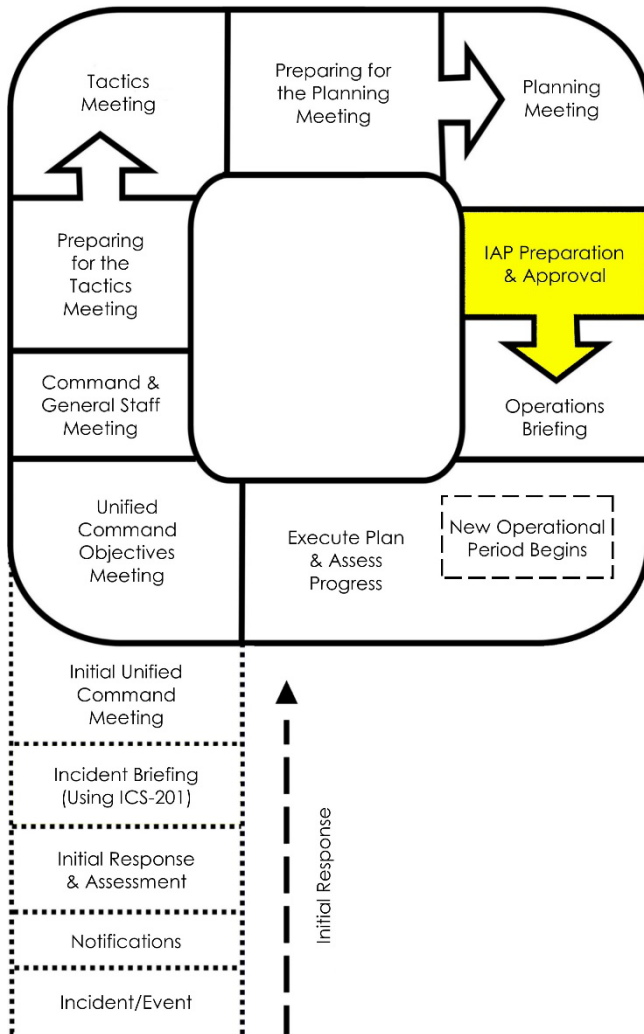
9. Planning Section Chief (PSC): Reflect upon Command's incident objectives (ICS-202), priorities, decisions, and direction (ICS-202a).
10. Operations Section Chief (OSC): Provide a briefing on current operations, followed by an overview of the proposed plan. Address strategies, tactics/work assignments, resource commitments, contingencies, organizational elements, incident facilities, logistical support needs, etc. for the next operational period. Use the Situation Map and Operational Planning Worksheet (ICS-215) as references.
11. Planning Section Chief (PSC): Analyze the proposed plan to ensure Unified Command's (UC's) priorities are satisfied. Use Work Analysis Matrix (ICS-234) to demonstrate how strategies and tactics are aligned to address "operational" objectives for the next operational period.
12. Planning Section Chief (PSC): Describe Unified Command's (UC's) information reporting thresholds and time-critical expectations, as documented on ICS-202b.
13. Planning Section Chief (PSC): Validate responsibility for any open actions/tasks and "management" objectives, using ICS-233.
14. Planning Section Chief (PSC): Conduct a round-robin of Command and General Staff members to solicit their final input and commitment to the proposed plan.
 - 14a. Logistics Section Chief (LSC): Verify the availability of resources to support proposed task assignments. Relate any staffing, transportation, medical, supply, and communications concerns. Clarify resource ordering procedures, as necessary.
 - 14b. Safety Officer (SOFR): Discuss safety considerations/concerns with regards to the proposed operational plan. Reassure Unified Command (UC) that mitigating safety controls are in place for each work assignment.

Planning Meeting (Cont'd)

Agenda (Cont'd)

- 14c. Public Information Officer (PIO): Evaluate any potential news media or public concerns. Provide an update on the timing/scheduling of media releases, media briefings/press conferences, town hall meetings, media/VIP tours, etc.
- 14d. Liaison Officer (LOFR): Examine any emerging issues/concerns expressed by agency representatives, elected officials, trustees, and stakeholders. Make everyone aware of scheduled visits by dignitaries, politicians, VIPs, etc.
- 14e. Finance Section Chief (FSC): Deliver a brief report on expenditures, daily/cumulative costs, burn rate, financial constraints, contract support, claims procedures, etc.
- 15. Planning Section Chief (PSC): Request Unified Command's (UC's) tacit approval of the plan as presented.
- 16. Planning Section Chief (PSC): Issue assignments to appropriate Incident Management Team (IMT) members for developing Incident Action Plan (IAP) support documentation, along with deadlines. Emphasize the need to complete the IAP well in advance of the Operations Briefing to facilitate a thorough review by the Unified Command (UC).
- 17. Planning Section Chief (PSC): Adjourn meeting.

Incident Action Plan (IAP) Preparation & Approval



Overview: During this phase of the Planning "P", appropriate Incident Management Team (IMT) members complete assigned tasks and products from the Planning Meeting required for inclusion in the Incident Action Plan (IAP). These products must meet the deadline as set by the Planning Section Chief (PSC) to allow enough time for Planning Section staff to assemble the IAP components.

Planning Responsibilities:

- Supervise preparation of the Incident Action Plan (IAP).
- Review the completed Incident Action Plan (IAP) for correctness.
- Provide the Incident Action Plan (IAP) to the Incident Commander (IC)/Unified Command (UC) for review and approval.
- Once approved, make copies of the signed Incident Action Plan (IAP) in preparation for the upcoming Operations Briefing.
- Provide the Documentation Unit Leader (DOCL) with the original signed Incident Action Plan (IAP) for inclusion into the permanent incident records.

Incident Action Plan (IAP) Preparation & Approval (Cont'd)

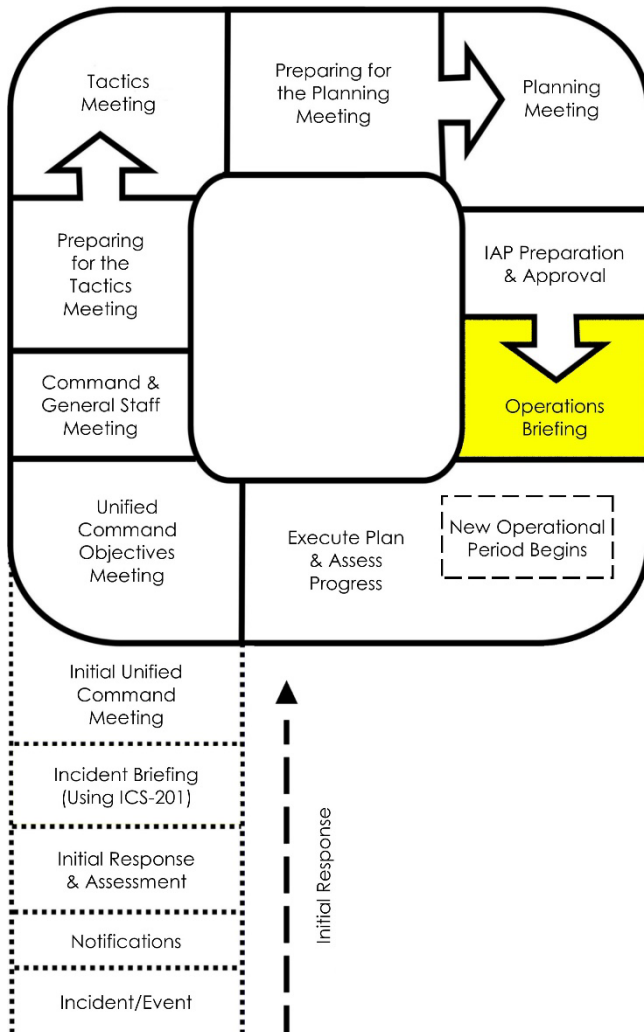
Suggested IAP Contents

- IAP Cover Sheet (ICS-200).
- Incident Objectives (ICS-202).
- Organization Assignment List (ICS-203).
- Assignment List (ICS-204) (multiple worksheets).
- Incident Radio Communications Plan (ICS-205).
- Communications List (ICS-205a).
- Medical Plan (ICS-206).
- Incident Organization Chart (ICS-207).
- Meeting Schedule (ICS-230).
- incident maps/charts.
- weather forecasts.

Optional Components

- Command Direction (ICS-202a).
- Critical Information Requirements (ICS-202b).
- Site Safety & Health Plan (ICS-208).
- Air Operations Summary (ICS-220).
- Resources at Risk Summary (ICS-232).
- Waste Management Plan.
- Site/Shoreline Cleanup Plan.
- Equipment Decontamination Plan.
- Information Management Plan.
- Incident Traffic Plan.
- Vessel Routing Plan.
- Incident Demobilization Plan.

Operations Briefing



Overview: The Operations Briefing conveys the Incident Action Plan (IAP) for the upcoming operational period to the response organization. The briefing provides an opportunity for the Operations Section Chief (OSC) to meet face-to-face with Branch Directors (OPBD), Division/Group Supervisors (DIVS), Staging Area Managers (STAM), OSRO representatives, and other incident supervisory personnel to review and discuss the tactical plan.

Schedule: The Operations Briefing is scheduled upon completion of the Incident Action Plan (IAP) and is typically held approximately one (1) hour prior to shift change, usually at both sunrise and sunset. The briefing is oftentimes held simultaneously in the Incident Command Post (ICP) and multiple locations in the field.

Facilitator: Planning Section Chief (PSC).

Attendees:

- Federal OSC.
- State OSC.
- Local OSC.
- Incident Commander (RPIC).
- Safety Officer (SOFR).
- Public Information Officer (PIO).
- Liaison Officer (LOFR).
- Operations Section Chief (OSC).
- Branch Directors (OPBDs).
- Division/Group Supervisors (DIVS).
- Strike Team Leaders (STL).
- Task Force Leaders (TFL).
- Staging Area Managers (STAM).
- OSRO Representatives.

Operations Briefing (Cont'd)

Attendees (Cont'd):

- Planning Section Chief (PSC).
- Situation Unit Leader.
- Documentation Unit Leader (DOCL).
- Logistics Section Chief (LSC).
- Finance Section Chief (FSC).

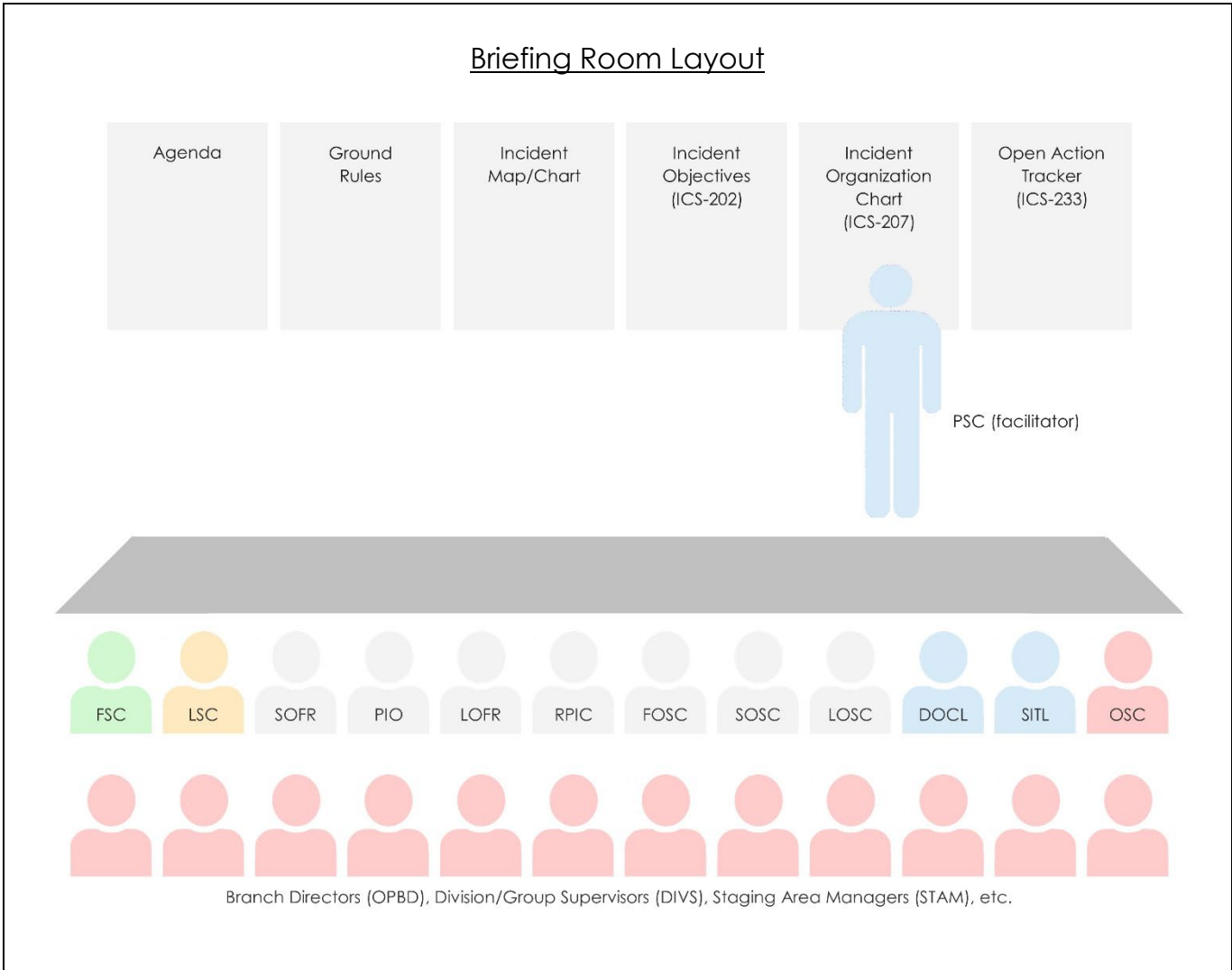
Duration: Approximately 30 minutes.

Planning Responsibilities:

- Set up meeting room.
- Facilitate the briefing.
- Distribute copies of the Incident Action Plan (IAP) to the respective Branch Directors (OPBD), Division/Group Supervisors (DIVS), and others with field supervisory responsibilities.
- Document any “pen and ink” changes to the Incident Action Plan (IAP) made during the briefing.

Operations Briefing (Cont'd)

The recommended room layout and seating arrangement for the Operations Briefing is illustrated below:



Operations Briefing (Cont'd)

Agenda

1. Planning Section Chief (PSC): Bring the meeting to order, by stating "Good morning/afternoon. It's [time and date] and I'd like to call the Operations Briefing to order."
2. Planning Section Chief (PSC): Conduct roll call for the various ICS positions/functions listed on page 120-121.
3. Planning Section Chief (PSC): Announce ground rules, as follows:
 - Silence all electronic devices.
 - Respect the meeting agenda.
 - Be mindful of time.
 - Presenters front and center.
 - Limit interruptions and side conversations.
 - Table discussions unrelated to the meeting.
4. Planning Section Chief (PSC): Briefly review the agenda, noting the purpose of the meeting is to convey the Incident Action Plan (IAP) for the upcoming operational period to the response organization.
5. Planning Section Chief (PSC): Confirm the Documentation Unit is taking meeting minutes and tracking action items that could potentially arise during the meeting, using Meeting Summary (ICS-231) and Open Action Tracker (ICS-233), respectively.
6. Planning Section Chief (PSC): Distribute copies of the Incident Action Plan (IAP) to the respective Branch Directors (OPBD), Division/Group Supervisors (DIVS), Staging Area Managers (STAM), and others with field supervisory responsibilities.
7. Planning Section Chief (PSC): Review incident objectives (ICS-202), operational critical information requirements (ICS-202b), and changes to the Incident Action Plan (IAP) (from the previous edition), including any "pen and ink" revisions.
8. Unified Command (UC): Issue opening remarks.

Operations Briefing (Cont'd)

Agenda (Cont'd)

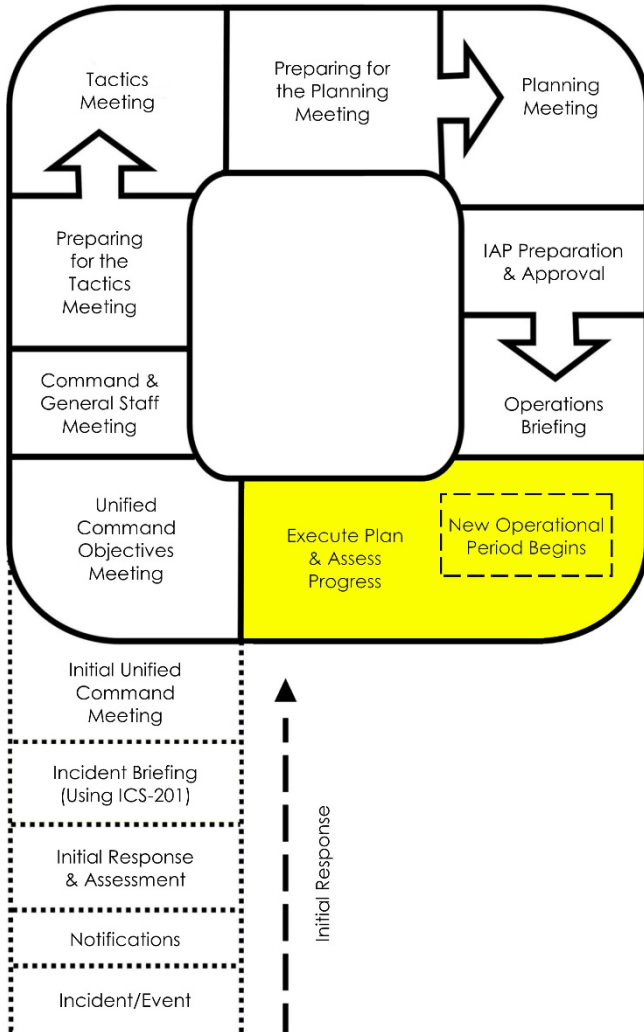
9. Situation Unit Leader (SITL): Provide a brief (less than 3-minute) synopsis of the current and projected incident situation. Highlight recent progress and accomplishments. Review the weather forecast. Use the Situation Map and Incident Status Summary (ICS-209) as references.
10. Safety Officer (SOFR): Convey a brief safety message for the next operational period. Discuss chemical hazards, personal protective equipment (PPE) requirements, medical emergency procedures, etc.
11. Operations Section Chief (OSC): Discuss current response actions and recent accomplishments.
12. Operations Section Chief (OSC): Brief Operations Section personnel on strategic/tactical priorities and work assignments for the next operational period. Use the Situation Map to illustrate work locations and clarify tasks.
13. Operations Section Chief (OSC): Review the Operations Section organization chart and expansion of the organizational structure into Branches, geographic Divisions, and functional Groups. Stress chain-of-command reporting requirements.
14. Logistics Section Chief (LSC): Communicate supply, communications, transportation, and medical updates, along with any other logistical issues that may be of concern to field personnel.
15. Operations Section Chief (OSC): Brief Operations Section personnel on strategic/tactical priorities and work assignments for the next operational period. Use the Situation Map to illustrate work locations and clarify tasks.
16. Operations Section Chief (OSC): Review the Operations Section organization chart and expansion of the organizational structure into Branches, geographic Divisions, and functional Groups. Stress chain-of-command reporting requirements.
17. Logistics Section Chief (LSC): Communicate supply, communications, transportation, and medical updates, along with any other logistical issues that may be of concern to field personnel.

Operations Briefing (Cont'd)

Agenda (Cont'd)

18. Finance Section Chief (FSC): Examine fiscal issues relating to personnel and equipment time recording, contractor performance, contracting, liability/damage claims, etc.
19. Public Information Officer (PIO): Cover public affairs and public information issues. Announce the schedule for any media briefings or press conferences. Discuss potential interactions with the news media. Provide contact information for the Joint Information Center (JIC), if established.
20. Liaison Officer (LOFR): Address any inter-agency issues.
21. Unified Command (UC): Deliver closing comments. Offer words of encouragement relating to ongoing response efforts and the hard work put into the incident. Highlight safety and the support of personnel in the field.
22. Planning Section Chief (PSC): Solicit final comments and adjourn briefing.

Execute Plan & Assess Progress



Overview: Assessment is a continuous activity used to help plan for future operations.

Planning Responsibilities:

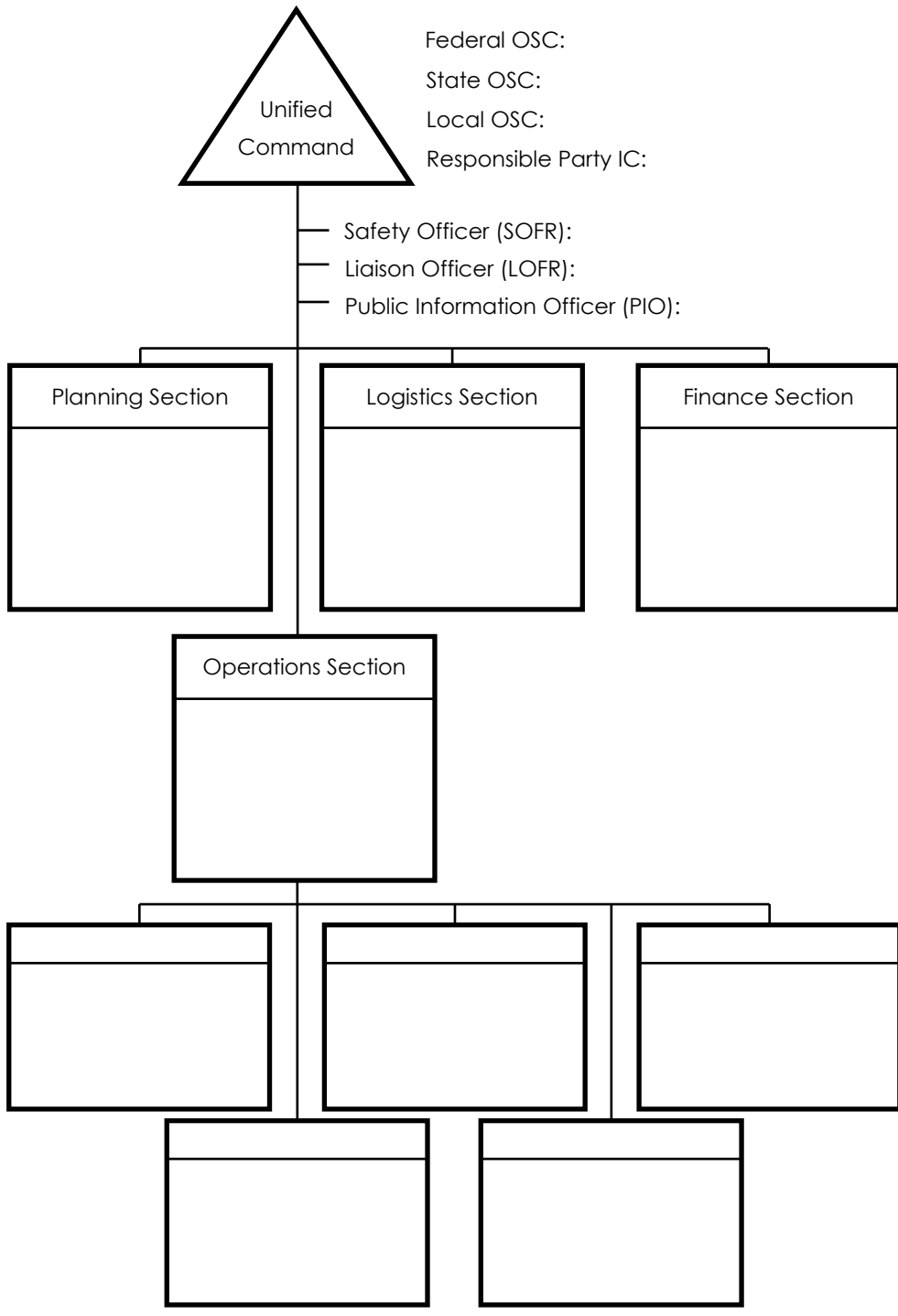
- Monitor implementation of the Incident Action Plan (IAP).
- Measure/ensure progress against stated objectives.
- Maintain Situation and Resources status.
- Debrief resources coming off shift.
- Maintain interaction with members of the Command & General Staff.

Incident Action Planning

Map/Sketch (ICS-201-1)

Incident Name:		Operational Period (start):		Operational Period (end):	
Prepared By (IC):		ICS Position/Assignment:		Preparation Date/Time:	

Current Organization (ICS-201-3)

Incident Name:	Operational Period (start):	Operational Period (end):
 <p>The diagram shows a hierarchical organizational structure. At the top is a triangle labeled 'Unified Command'. To its right are four text fields: 'Federal OSC:', 'State OSC:', 'Local OSC:', and 'Responsible Party IC:'. Below the triangle is a vertical line with three horizontal branches leading to 'Safety Officer (SOFR):', 'Liaison Officer (LOFR):', and 'Public Information Officer (PIO):'. The main vertical line continues down to a horizontal line that branches into three boxes: 'Planning Section', 'Logistics Section', and 'Finance Section'. Below these is a single box for 'Operations Section'. A horizontal line below the Operations Section branches into three boxes. Below these three boxes are two more boxes, each centered under one of the three boxes above.</p>		
Prepared By (IC):	ICS Position/Assignment:	Preparation Date/Time:

Resources Summary (ICS-201-4)

Incident Name:	Operational Period (start):			Operational Period (end):			
	Resource Description	Quantity	Supplier	Time Ordered	ETA	On-site (x)	Status/Assignment
						<input type="checkbox"/>	
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						<input type="checkbox"/>	
Prepared By (IC):	ICS Position/Assignment:			Preparation Date/Time:			

Incident Action Planning

IAP Cover Sheet (ICS-200)

Incident Name:	Operational Period (start):	Operational Period (end):
Approvals: <input type="checkbox"/> Federal On-Scene Coordinator (FOSC): <input type="checkbox"/> State On-Scene Coordinator (SOSC): <input type="checkbox"/> Local On-Scene Coordinator (LOSC): <input type="checkbox"/> Responsible Party Incident Commander (RPIC): <input type="checkbox"/>		
<h3>INCIDENT ACTION PLAN</h3> <p>The items checked below are included in this Incident Action Plan (IAP):</p> <input type="checkbox"/> Incident Objectives (ICS-202) <input type="checkbox"/> Organization Assignment List (ICS-203) <input type="checkbox"/> Assignment List (ICS-204) <input type="checkbox"/> Incident Radio Communications Plan (ICS-205) <input type="checkbox"/> Communications List (ICS-205a) <input type="checkbox"/> Medical Plan (ICS-206) <input type="checkbox"/> Incident Organization Chart (ICS-207) <input type="checkbox"/> Site Safety & Health Plan (ICS-208) <input type="checkbox"/> Air Operations Summary (ICS-220) <input type="checkbox"/> Meeting Schedule (ICS-230) <input type="checkbox"/> Resources at Risk Summary (ICS-232) <input type="checkbox"/> Weather Forecast <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
Prepared By (PSC):	ICS Position/Assignment:	Preparation Date/Time:

Incident Action Planning

Incident Objectives (ICS-202)

Incident Name:	Operational Period (start):	Operational Period (end):
Overall Incident Objectives:		
Operational Period Command Emphasis (priorities, key decisions/directions, etc.):		
Safety Message for the Operational Period:		
Approved Site Safety & Health Plan (ICS-208) located at:		
Prepared By (PSC):	ICS Position/Assignment:	Preparation Date/Time:

Example Objectives & Strategies

1. Ensure the safety of citizens and response personnel.
 - Identify hazard(s) of the spilled material.
 - Establish site control (hot zone, warm zone, cold zone, and security).
 - Consider facility/community evacuations, as needed.
 - Establish vessel/aircraft restrictions.
 - Monitor air in impacted areas.
 - Develop a Site Safety & Health Plan (ICS-208) for response personnel.
 - Conduct safety briefings.

2. Control the source of the spill.
 - Complete emergency shutdown.
 - Conduct firefighting, as necessary.
 - Initiate temporary repairs.
 - Transfer product.

3. Manage a coordinated response effort.
 - Complete/confirm notifications.
 - Establish a Unified Command organization and incident facilities.
 - Include local officials in the response organization.
 - Initiate spill response Incident Action Plan (IAPs).
 - Mobilize and track response resources.
 - Account for personnel and equipment.
 - Complete documentation.

4. Maximize the protection of sensitive areas.
 - Implement pre-designated response strategies.
 - Identify resources at risk in the vicinity of the spill.
 - Track oil movement and develop spill trajectories.
 - Conduct visual assessments, e.g., overflights.
 - Develop/implement appropriate protection tactics.

5. Contain and recover spilled material.
 - Deploy containment boom at the source of the spill.
 - Deploy boom at appropriate collection areas.
 - Conduct oil skimming operations.
 - Develop a waste management plan.

Example Objectives & Strategies (Cont'd)

6. Recover and rehabilitate injured wildlife.
 - Establish an oiled wildlife reporting hotline.
 - Conduct injured wildlife search and rescue operations.
 - Set up a primary care unit for injured wildlife.
 - Open a wildlife rehabilitation center.
 - Initiate a citizen volunteer effort for oiled bird rehabilitation.

7. Remove oil from impacted areas.
 - Conduct appropriate shoreline cleanup efforts.
 - Clean oiled structures.
 - Decontaminated oiled equipment.

8. Minimize economic impacts.
 - Consider tourism, and local economic impacts throughout the response.
 - Protect public/private assets, as resources permit.
 - Establish a damage claims process.

9. Keep the public and stakeholders informed of response activities.
 - Provide a forum to obtain stakeholder input and concerns.
 - Provide stakeholders with details of response actions.
 - Identify stakeholder concerns and issues. and address as practical.
 - Provide elected officials with details of response actions.
 - Provide timely safety announcements.
 - Establish a Joint Information Center (JIC).
 - Conduct regular media briefings.
 - Manage news media access to spill activities.
 - Conduct public meetings, as appropriate.

Work Analysis Matrix (ICS-234)

Incident Name:	Operational Period (start):	Operational Period (end):
Operational Objectives	Strategies	Tactics/Work Assignments
Prepared By (OSC/PSC):	ICS Position/Assignment:	Preparation Date/Time:

Operational Planning Worksheet (ICS-215)

Incident Name:			Operational Period (start):					Operational Period (end):			
Branch/Group/ Division/Worksite	Work Assignment	Status	Resource/Equipment					Overhead Positions	Special Equipment	Reporting Location	Reporting Date/Time
		Required									
		Have									
		Need									
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Incident Action Planning

Assignment List (ICS-204)

Incident Name:	Operational Period (start):	Operational Period (end):	
Branch/Unit:	Division/Group:	Strike Team/Task Force:	
Leader Manager:		Assignment Location:	
Work Assignment (tactical objectives and special instructions):			
Equipment & Personnel Resources (needed to complete assignment):			
Description	Quantity	Description	Quantity
Site Specific Safety Considerations:			
Environmental Considerations:			
Important Personnel Contacts:			
Name	Position/Assignment	Telephone #	Radio
Attachments (indicate with "x"):			
<input type="checkbox"/> Map/Chart	<input type="checkbox"/> Weather Forecast	<input type="checkbox"/> Streamflow Graph	<input type="checkbox"/> River Stage Report
<input type="checkbox"/> SCAT Report	<input type="checkbox"/> Sampling Plan	<input type="checkbox"/> Photographs	<input type="checkbox"/> Other
Prepared By (PSC/RESL):	ICS Position/Assignment:	Preparation Date/Time:	

Resources Request (ICS-213-RR)

Incident Name:		Preparation Date/Time:				Resources Request #:			
Requester completes the entries below, including resource description, type/kind, quantity, delivery location, reporting date/time, priority (urgent/routine/low), and suggested source(s) of supply:									
Resource Description	Type/Kind	Quantity	Delivery Loc.	Reporting Date/Time	Priority	Tracking #	ETA	Cost	
Suggested Source(s) of Supply (use additional forms when requesting different sources of supply):									
Requestor's Name/Position:		Telephone #:		Date/Time:		Supervisor Approval:		Date/Time:	
Planning Section (Resources Unit) completes the following entries regarding the on-site availability of requested resources:									
Is the request for tactical equipment or personnel resources? <input type="checkbox"/> Yes <input type="checkbox"/> No					Resources Unit Signature: _____ Date/Time: _____				
If yes, is the resource currently available (unassigned)? <input type="checkbox"/> Yes <input type="checkbox"/> No									
Logistics (Supply Unit)/Finance (Procurement Unit) completes the following entries, including purchase order # and name of vendor:									
Requisition/Purchase Order (PO) #:			Ordering Manager:			Logistics Section Signature:		Date/Time:	
Name of Supplier/Vendor:			Supplier/Vendor Telephone/Email:			Finance Section Signature:		Date/Time:	
Remarks/Comments:									

Recommended Staffing

ICS Position	# of Operational Divisions/Groups				
	2	5	10	15	25
Planning Section Chief (PSC)	1 per incident				
• Deputy Planning Section Chief	1	1	1	2	3
○ Situation Unit Leader (SITL)	1	1	1	1	1
- Assistant SITL			1	1	1
- Display Processor (DPO)		1	1	1	1
- GIS Specialist	1	1	2	2	4
- Field Observer (FOBS)		1	2	2	4
- Weather Forecast Specialist	As needed				
○ Resources Unit Leader (RESL)	1	1	1	1	1
- Assistant RESL			1	1	1
- Check-in Recorder (CHKN)	One per Check-in Location				
○ Documentation Unit Leader (DOCL)	1	1	1	1	1
- Stenographer			1	1	1
- Administrative Assistant			1	2	3
○ Environmental Unit Leader (ENVL)	As needed (incident-dependent)				
- Technical Specialist (THSP)	As needed (incident-dependent)				
○ Demobilization Unit Leader (DMOB)	1	1	1	1	1

Acronyms

ACP	Area Contingency Plan
ALS	Advanced Life Support
ANSI	American National Standards Institute
AOBD	Air Operations Branch Director
ASOFR	Assistant Safety Officer
ATV	All-Terrain Vehicle
AVL	Approved Vendor List
BLM	Bureau of Land Management
BLS	Basic Life Support
CHKN	Check-in Recorder
CO	Carbon Monoxide
COLT	Cell on Light Trucks
COML	Communications Unit Leader
COMP	Claims Unit Leader
COP	Common Operating Picture
COST	Cost Unit Leader
COW	Cell on Wheels
CSU	Central Supply Unit
DCN	Document Control Number
DIVS	Division/Group Supervisor
DMOB	Demobilization Unit Leader
DOCL	Documentation Unit Leader
EMS	Emergency Medical Services
EMT	Emergency Medical Technician
ENVL	Environmental Unit Leader
EOC	Emergency Operations Center
ERG	Emergency Response Guide
ETA	Estimated Time of Arrival
FAA	Federal Aviation Administration
FACL	Facilities Unit Leader
FDUL	Food Unit Leader
FRP	Facility Response Plan
FSC	Finance Section Chief
FSP	Facility Security Plan
GPS	Global Positioning System
GSA	General Services Administration
GSUL	Ground Support Unit Leader
H ₂ S	Hydrogen Sulfide
HDPE	High Density Polyethylene
HEP	Holly Energy Partners
HIPAA	Health Insurance Portability & Accountability Act
HVAC	Heating, Ventilation, and Air Conditioning
IAP	Incident Action Plan
IC	Incident Commander
ICC	Incident Communications Center

Acronyms

ICP	Incident Command Post
ICS	Incident Command System
IMH	Incident Management Handbook
IMT	Incident Management Team
IT	Information Technology
JIC	Joint Information Center
LAN	Local Area Network
LEL	Lower Explosive Limit
LSM	Local Notice to Mariners
LOFR	Liaison Officer
LSC	Logistics Section Chief
MEDL	Medical Unit Leader
MRE	Meal Ready-to-Eat
NDT	Non-Destructive Testing
NRCES	NRC Environmental Services
O ₂	Oxygen
OPA '90	Oil Pollution Act of 1990
OPBD	Operations Branch Director
ORDM	Ordering Manager
OSC	Operations Section Chief
OSHA	Occupational Safety & Health Administration
OSRO	Oil Spill Removal Organization
OTC	Over-the-Counter
PA	Public Address
PEL	Permissible Exposure Limit
PFD	Personal Flootation Device
PIO	Public Information Officer
PO	Purchase Order
PPE	Personal Protective Equipment
PROC	Procurement Unit Leader
PSC	Planning Section Chief
RCDM	Receiving & Distribution Manager
RESL	Resources Unit Leader
RN	Registered Nurse
RR	Resources Request
SAR	Source Area Response
SBS	Shallow-Water Barge System
SCAT	Shoreline Cleanup Assessment Technique
SCBA	Self-Contained Breathing Apparatus
SDS	Safety Data Sheet
SECM	Security Manager
SITL	Situation Unit Leader
SME	Subject Matter Expert
SOFR	Safety Officer
SOP	Standard Operating Procedure

Acronyms

STAM	Staging Area Manager
STEL	Short-Term Exposure Limit
STL	Strike Team Leader
SUPL	Supply Unit Leader
TFL	Task Force Leader
TFR	Temporary Flight Restriction
THSP	Technical Specialist
TPH	Total Petroleum Hydrocarbons
TSD	Treatment, Storage & Disposal
UC	Unified Command
UHF	Ultra High Frequency
UOP	Unified Ordering Point
USACE	U.S. Army Corps of Engineers
USBR	U.S. Bureau of Reclamation
USCG	U.S. Coast Guard
USDOT	U.S. Department of Transportation
USEPA	U.S. Environmental Protection Agency
USFWS	U.S. Fish & Wildlife Service
USPS	U.S. Postal Service
UTV	Utility Vehicle
VHF	Very High Frequency
VOC	Volatile Organic Compound
VSUL	Vessel Support Unit Leader