
Unit 6: Planning Cycle

STUDENT GUIDE

Objectives

By the end of this unit, students will be able to:

- Describe the purpose, timing, and structure of each of the meetings, briefings, and documents in the Planning Cycle
- Describe the Planning Section Chief's (PSC) role in the Planning Meeting
- Describe the purpose of the Incident Action Plan (IAP)
- Describe the components of the Incident Action Plan and who is responsible for preparing it
- Describe the Planning Section Chief's role in the Incident Action Plan
- Identify who approves the Incident Action Plan
- Describe the Planning Section Chief's role in the Operational Briefing
- Identify other Incident Management Team (IMT) meetings and briefings that the Planning Section Chief may attend

Methodology

This unit uses lecture, an exercise, and discussion.

Through this unit, students will learn the purpose, timing, and structure of each of the meetings, briefings, and documents in the Planning Cycle (Tactics Meeting, Planning Meeting, Operational Briefing, and Incident Action Plan). The Planning P will be used extensively in this topic to aid the student's understanding of when each meeting (and related tasks/events) takes place throughout the course of an operational period.

Content from Unit 6 will be tested during the final exam. Instructors will evaluate students' initial understanding of the Planning Section Chief responsibilities through the facilitation of Exercise 5.

The purpose of the exercise is to provide participants with an opportunity to practice performing some of the responsibilities of the Planning Section Chief. The focus will be on creating an agenda and facilitating the Planning Meeting.

Time Plan

A suggested Time Plan for this unit is shown below. More or less time may be required, based on the experience level of the group.

Topic	Time
Lesson	4 hours
Exercise 5	2 hours, 30 minutes
Total Time	6 hours, 30 minutes

Topic

The Planning Cycle



Key Points

Unit Terminal Objective

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

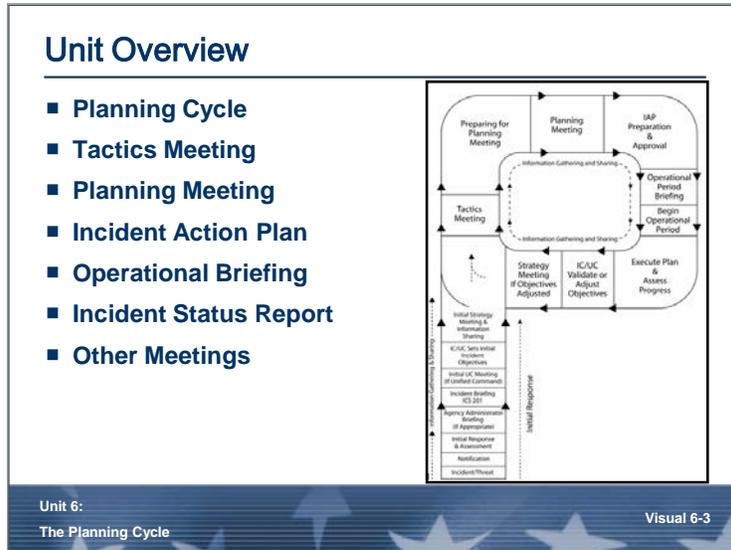
**Key Points**

Unit Terminal Objective

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

Unit Enabling Objectives

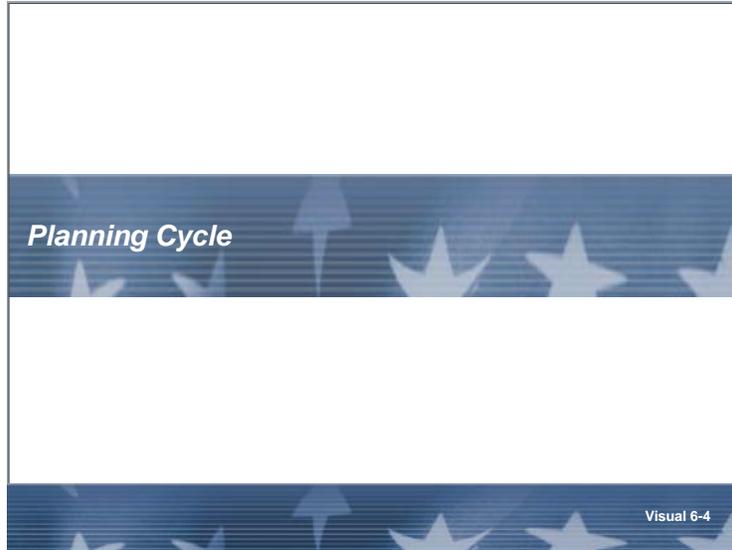
- Describe the Planning Section Chief's role in the Planning Meeting
- Describe the purpose of the Incident Action Plan
- Describe the components of the Incident Action Plan and who is responsible for preparing them
- Describe the Planning Section Chief's role in the Incident Action Plan
- Identify who approves the Incident Action Plan
- Describe the Planning Section Chief's role in the Operational Briefing
- Identify other Incident Management Team (IMT) meetings and briefings that the Planning Section Chief may attend



Key Points

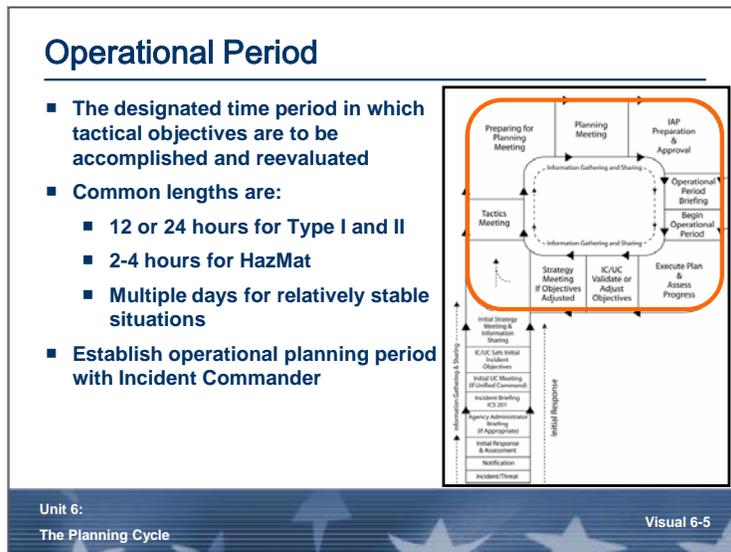
Topic

The Planning Cycle



Key Points

Topic Operational Period



Key Points

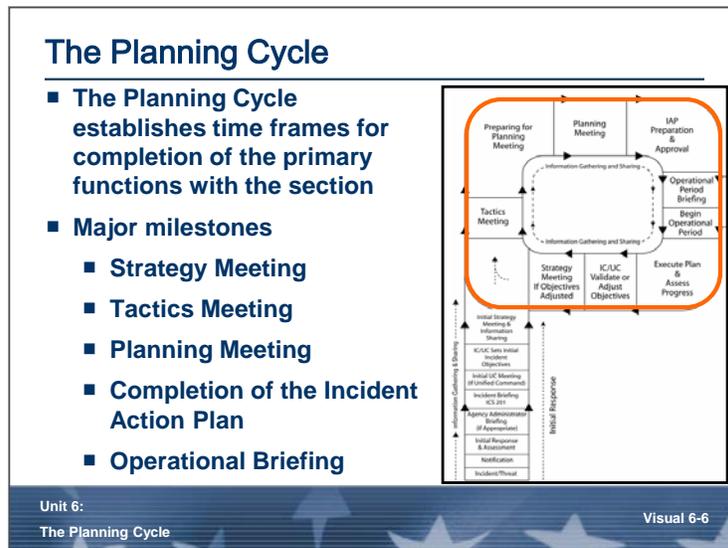
The operational period is the designated time period in which tactical objectives are to be accomplished and reevaluated. Common lengths are:

- 12 or 24 hours for Type 1 and 2 incidents
- 2 to 4 hours for hazardous materials incidents
- Multiple days for relatively stable situations

The specific length of time of the operational period varies based on a list of factors, such as:

- Safety conditions
- Condition of resources
- The length of time necessary or available to achieve the tactical assignments
- Availability of fresh resources
- Future involvement of additional jurisdictions or agencies
- Environmental conditions

Topic The Planning Cycle



Key Points

These milestones and meetings are a formal way of producing and documenting decisions. Documentation is a reference tool to help communicate the decisions during the operational period.

Remember that you walk a line between slavishly following a set process and losing the spirit of why you are doing the process. Let the process drive you to reach useful decisions. You need to understand the key point of an Incident Command System so that when somebody comes to you and says, “this is how the Incident Command System is accomplished,” you will have the knowledge to be able to respond appropriately.

The Planning P is very useful but sometimes you forget that there need to be interaction and discussion all day long. It is important to realize that casual, one-on-one conversations are important to the planning process as well.

The purpose of the Planning Cycle is to establish timeframes for completion of the primary functions with the Section.

The Planning Section Chief is responsible for seeing the Planning Cycle process and time frames are adhered to.

The Planning Cycle requires completion of five major items:

- Strategy Meeting

- Tactics Meeting
- Planning Meeting
- Completion of the Incident Action Plan
- Operational Briefing

Topic Meeting Facilitation

Meeting Facilitation

The Planning Section Chief is responsible for facilitating meetings and briefings.

- Clearly define objectives
- Follow predetermined agenda
- Predetermine audience
- Establish meeting locations
- Provide specific deliverables
- Ensure meetings are as productive and efficient as possible

Unit 6:
The Planning Cycle

Visual 6-7

Key Points

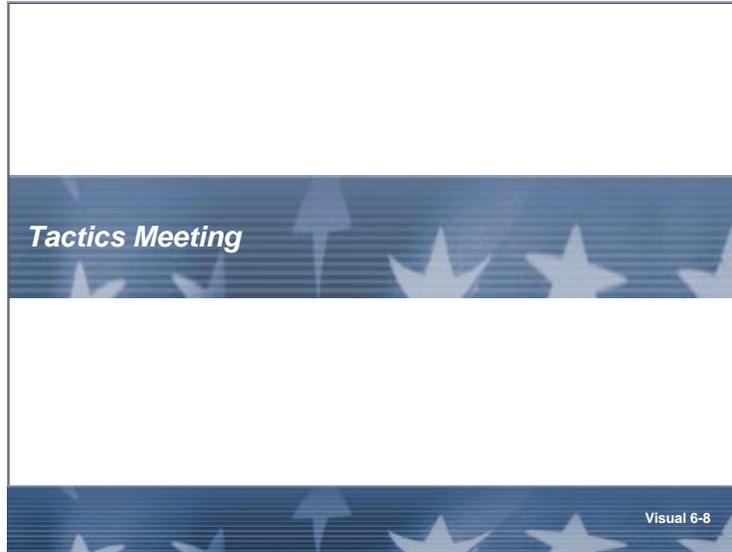
As the Planning Section Chief, your job will be to make sure the meetings take place on time and remain organized. Meetings present complex challenges with various components that require a lot of time and attention from the Planning Section Chief. There are many factors that can divert the attention of the Planning Section Chief to focus on meetings, including the skill set of your team and requests from other Sections of the Incident Management Team.

As the Planning Section Chief, you should be able to answer all these questions.

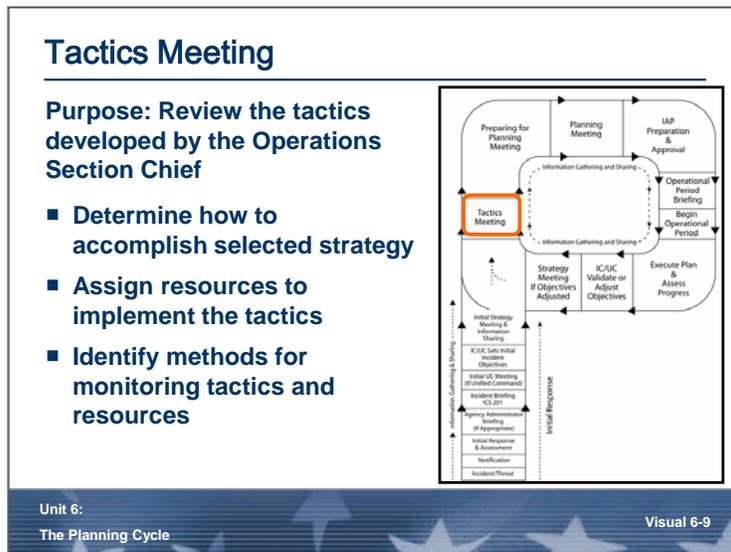
- What is supposed to come out of this particular meeting or briefing?
- What should it look like?
- When will it be held?
- How long will it last?
- Who should attend?

Topic

Tactics Meeting



Key Points



Key Points

The purpose of the Tactics Meeting is to review the tactics developed by the Operations Section Chief. This includes:

- Determining how the selected strategy will be accomplished in order to achieve the incident objectives
- Assigning resources to implement the tactics
- Identifying methods for monitoring tactics and resources to determine if adjustments are required (e.g., different tactics, different resources, or new strategy)

The Incident Commander will update the initial objectives if warranted. Upon review, the Planning Section Chief will provide the alternatives and strategy that will be necessary before the Planning Meeting begins.

The Operations Section Chief provides the direction on how resources will be deployed to meet the Incident Commander's objectives. This blueprint of tactical deployment for the next operational period will be developed and revised before the Planning Meeting, where formal deployment of resources and work assignments will be approved.

Topic Tactics Meeting (cont.)

Tactics Meeting (cont.)

- **The Tactics Meeting is typically brief**
- **Occurs 1-3 hours prior to the Planning Meeting**
- **Usually informal**



Unit 6:
The Planning Cycle

Visual 6-10

Key Points

The Tactics Meeting is a rather informal meeting. It typically occurs 1 to 3 hours prior to the Planning Meeting and tends to be very brief.

Topic Tactics Meeting (cont.)

Tactics Meeting (cont.)

- Operations Section Chief, Safety Officer, Planning Section Chief, Logistics Section Chief, and Resource Unit Leader typically attend the Tactics Meeting
- Others attend, strictly as needed
- Operations Section Chief leads the Tactics Meeting
- Planning Section Chief may facilitate to help keep meeting on track



Unit 6:
The Planning Cycle Visual 6-11

Key Points

Attendees include:

- Operations Section Chief
- Safety Officer
- Planning Section Chief
- Logistics Section Chief
- Resources Unit Leader

The following people may also need to be involved, depending on the magnitude and complexity of the planned operations:

- Communications Unit Leader
- Ground Support Unit Leader
- Situation Unit Leader
- Technical Specialist

Operations Section Chief leads the Tactics Meeting but the meeting is scheduled and facilitated by the Planning Section Chief.

ICS Form 215

- An initial version of the Operational Planning Worksheet (ICS Form 215) may be drafted during the Tactics Meeting
- Operations Section Chief completes ICS Form 215 with help from Resources Unit Leader
- Completed at least 15-30 minutes prior to Planning Meeting

Unit 6:
The Planning Cycle

Visual 6-12

Key Points

The ICS Form 215 – Operational Planning Worksheet is used to document the Tactics Meeting. It includes group by function, work assignments, kind, and type of resource plus availability, reporting location for resources, and requested arrival time of resources.

The Operations Section Chief completes the form with assistance from the Resources Unit Leader. The Resources Unit Leader is there, marker in hand, filling out this worksheet. There are several acceptable approaches to prepare for the Tactics Meeting:

- Operations Section Chief has the form completely filled out before the meeting
- Operations Section Chief brings a sketched-out rough draft to the meeting
- Operations Section Chief begins the process during the meeting

After reviewing ICS Form 215 for potential hazards, the Safety Officer determines mitigation measures and documents both on the Incident Plan Safety Analysis (ICS Form 215a).

The Operational Planning Worksheet is designed to document the results of the Tactics Meeting. The ICS 215 includes:

- Division by geography

- Group by function
- Work assignments
- Kind and type of resource plus availability (Requested, Have, or Need)
- Reporting location for resources
- Requested arrival time of resources

The Operations Section Chief completes the Operational Planning Worksheet (ICS Form 215) with assistance from the Resources Unit Leader.

This worksheet should be completed at least 15–30 minutes prior to the Planning Meeting.

Topic ICS Form 215 (cont.)

ICS Form 215 (cont.)

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

- Prevent unnecessary discussion of tactics
- Maximize effectiveness
- Avoid excessive external influences
- Promote a perception of organization

Unit 6:
The Planning Cycle Visual 6-13

Key Points

Completing the ICS Form 215 – Operational Planning Worksheet prior to the Planning Meeting will:

- Prevent unnecessary discussion of tactical operations in an open forum
- Maximize the effectiveness of the Planning Meeting
- Avoid excessive external influences
- Promote a perception of organization

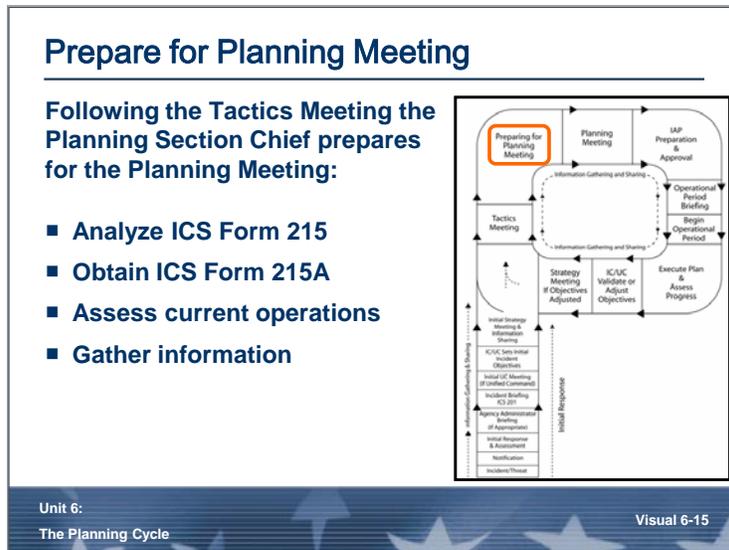
Topic

Prepare for Planning Meeting



Key Points

Topic Prepare for Planning Meeting



Key Points

Following the Tactics Meeting, the Planning Section Chief coordinates preparation for the Planning Meeting. Preparation includes:

- Analyzing the ICS Form 215 – Operational Planning Worksheet developed in the Tactics Meeting
- Assessing current operations effectiveness and resource efficiency
- Gathering information to support incident management decisions

Topic Planning Section Chief Preparation

Planning Section Chief Preparation

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

Unit 6:
The Planning Cycle

Visual 6-16

Key Points

The Planning Section Chief is the glue that holds everything together.

Preparation includes:

- Determining Planning Meeting participants with Incident Commander
 - Only key personnel should attend the Planning Meeting in order to facilitate an orderly and brief exchange of information; final determination of participants is made by the Incident Commander
 - Ensuring that planning maps, forms, and resource and situation status are available and up-to-date
- Establishing and posting the location and time for the Planning Meeting
 - Large enough and out of the weather
 - Free from distractions
- Informing attendees of time, location, and expectations
 - Post the Planning Cycle timeframes at the Incident Command Post
 - Post agenda for meeting
- Using large sketch maps or charts for planning and briefing

- Displaying Incident Command System Forms 215 and 215a
- Having the Resources Unit prepare a current resource inventory
- Having the Situation Unit update displays and summarize current intelligence gathered

Topic Planning Section Preparation

Planning Section Preparation

To prepare for the Planning Meeting:

- The Situation Unit Leader provides displays or intelligence
- The Resources Unit Leader fills out large ICS Form 215 and identifies resource availability
- Technical Specialists provide analysis in area of expertise

Unit 6:
The Planning Cycle

Visual 6-17

Key Points

There are a number of responsibilities for the Planning Section when it comes to preparing for the Planning Meeting.

The Situation Unit provides displays or intelligence, such as:

- Impacts to public health
- Current maps and situations
- Natural resource damage
- Evacuation status
- Clean-up progression
- Sampling and monitoring data
- Other pertinent intelligence

The Resources Unit fills out large an ICS Form 215 – Operational Planning Worksheet and identifies resource availability.

Technical Specialists provide analyses in areas of expertise.

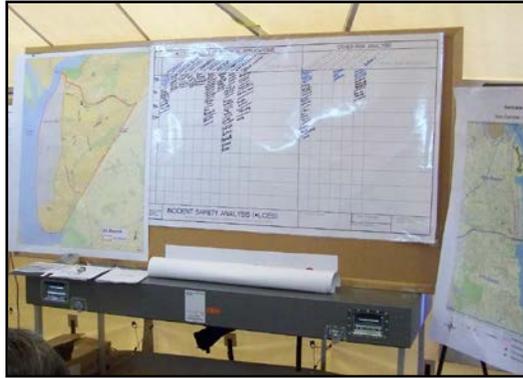
If there are Technical Specialists who are specifically needed for the Planning Meeting, such as a Meteorologist or Structural Engineer, as the Planning Section Chief you need to make sure that they are in attendance and aware of what they need to produce.

Ensure that Planning Section staff is aware of assignments:

- Situation Unit Leader:
 - Impacts to public health
 - Current maps and situations
 - Natural resource damage
 - Evacuation status
 - Clean-up progression
 - Sampling and monitoring data
 - Other pertinent intelligence
- Resources Unit Leader:
 - Current status of resources on incident as well as regionally and nationally
 - ICS Form 215 filled in
 - Resource availability
- Technical Specialist:
 - Risk analysis, response and clean-up technology
 - Epidemiological data
 - Meteorological data
 - Analysis in area of expertise

Topic Display for Planning Meeting

Display for Planning Meeting



Unit 6:
The Planning Cycle

Visual 6-18

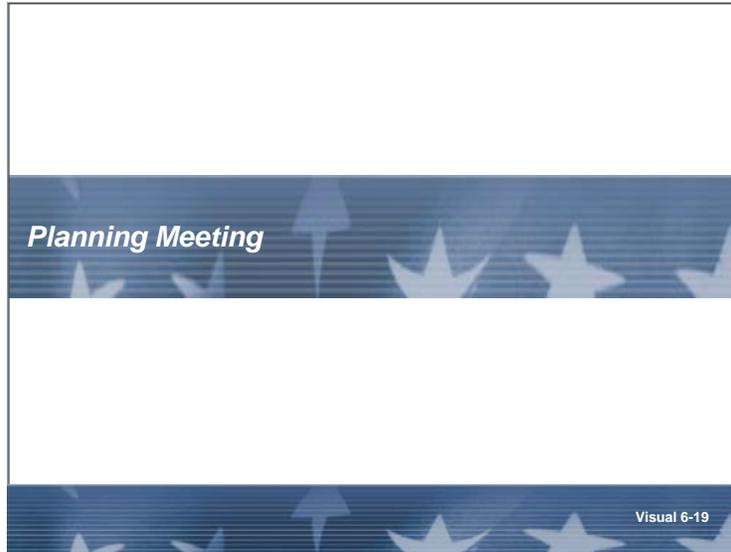
Key Points

Ensure maps, forms, and appropriate intelligence data are displayed or available.

- Large-scale current, accurate map of incident
- Large ICS Forms 215 and 215A if needed
- Easel charts, markers, etc., for bin items
- Include confirmed, ordered resources that have not yet arrived

Topic

Planning Meeting



Key Points

Topic Planning Meeting**Planning Meeting**

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



Unit 6:
The Planning Cycle

Visual 6-20

Key Points

The Planning Meeting provides the opportunity to review and validate the Operational Plan.

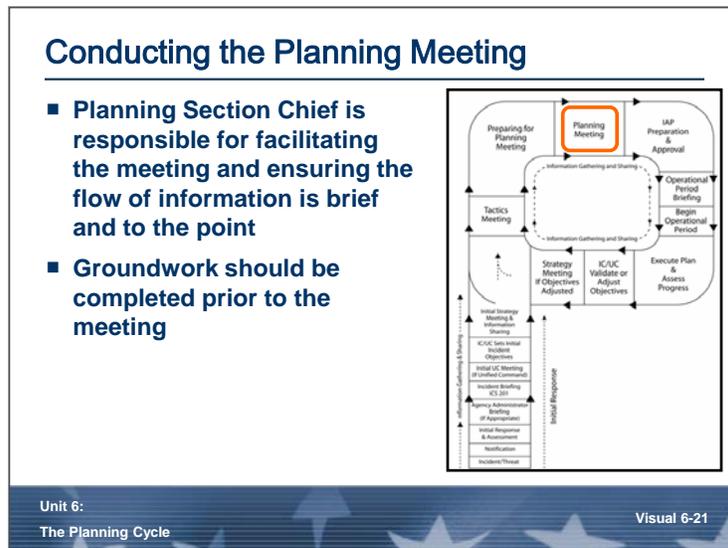
The planning process was developed to assist the Planning Section Chief in developing the Incident Action Plan using the information, tactics, resource requirements, and the needs of the Operations Section Chief in an orderly and systematic manner.

The purpose of the Planning Meeting is to put the final touches on ICS Form 215, gather support for the plan from the Command and General Staff, and gain approval from the Incident Commander.

The Incident Commander places considerable emphasis on developing the Incident Action Plan. The Operations Section Chief describes the amount and type of resources he/she will need to accomplish the plan. The Resources Unit Leader works with the Logistics Section Chief to fulfill the resource needs.

At the end of the meeting, the Planning Section Chief indicates when all elements of the plan and support documents must be submitted so the plan can be collated, duplicated, and made ready for the Operational Briefing.

Topic Conducting the Planning Meeting



Key Points

If the Tactics Meeting has taken place, the information and proposed plan should not surprise anyone during the Planning Meeting. Under the best circumstances, it will be a brief meeting with only minor changes.

The Planning Section Chief is responsible for facilitating the Planning Meeting and ensuring that the flow of information is brief and to the point.

Most of the groundwork for the plan should have been done by all parties involved prior to the meeting. This prevents the group from diverging from the subject at hand.

Topic Facilitating the Planning Meeting

Facilitating the Planning Meeting	
Tips for Facilitation	
Adhere to the planning process	Stay focused and keep as brief as possible
Silence all cell phones and Blackberries	Always start on time
Always give ground rules	Always display Command presence
Keep to 30 minutes or less	Touch base with all concerned
Stay on track and arrange post-meeting discussions	Participants must be prepared and able to commit their agencies

Unit 6:
The Planning Cycle

Visual 6-22

Key Points

Tips for facilitating the Planning Meeting:

- Require all participants to come prepared
- Agency representatives must be able to commit their agencies
- Responsible party/landowners must have authority
- Adhere to the planning process
- The type of incident influences the agenda
- Silence all cell phones and Blackberries
- Stay focused and keep Planning Meeting as brief as possible
- Always start on time
- Always give ground rules
- Always display Command presence
- Keep to 30 minutes or less
- Always use time savers

- Touch based with all concerned
- Focus on what you are there for
- Keep on track by arranging after-meeting discussions

The Planning Meeting is a working meeting where decisions are made. In some cases things come up and the property owner may need to make decisions.

Time Savers

- Have involved people up front
- Discuss their roles before the meeting
- Know who will speak
- No dead air time



Unit 6:
The Planning Cycle

Visual 6-23

Key Points

Topic Planning Meeting Checklist

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

See Handout 6-1: Planning Meeting Agenda

Unit 6:
The Planning Cycle

Visual 6-24

Key Points

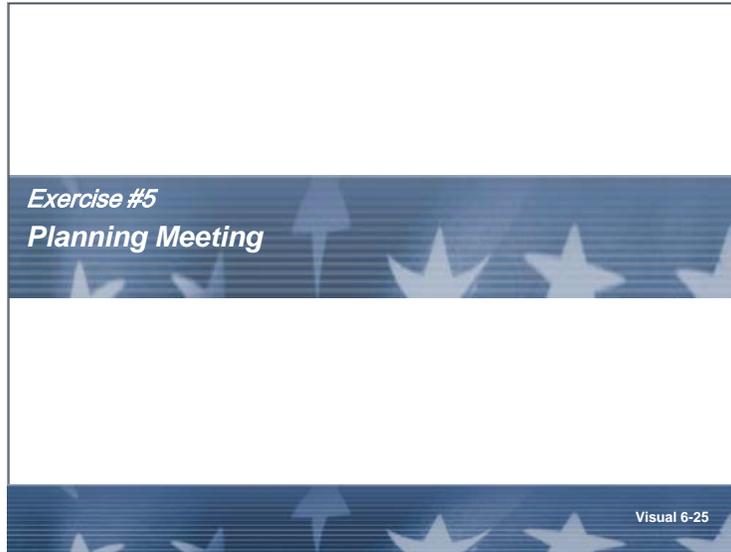
Handout 6-1 provides a sample Planning Meeting Agenda.

The Planning Meeting Checklist provides basic steps for use in almost any incident situation. However, not all incidents require written Incident Action Plans. The need for a written Incident Action Plan and attachments is based on incident requirements and the decision of the Incident Commander.

Before participants leave the Planning Meeting, make sure they know when you want the products.

Topic

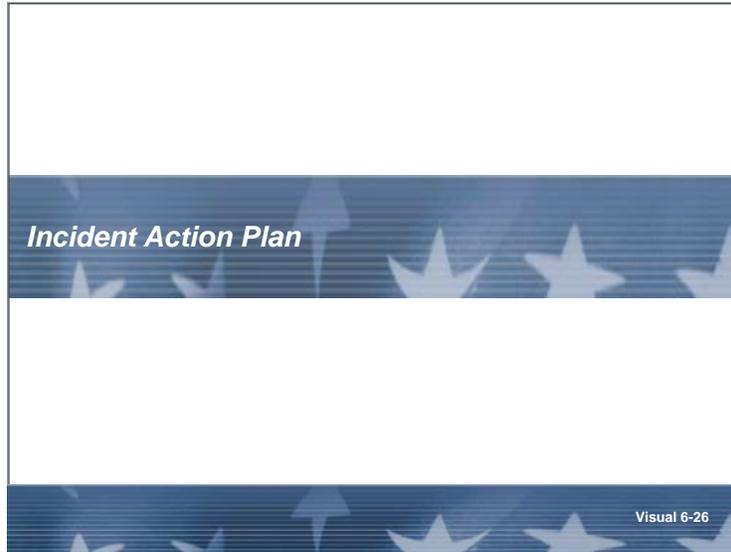
Exercise 5: Planning Meeting



Key Points

Topic

Incident Action Plan



Key Points

Topic Incident Action Plan

Incident Action Plan (IAP)

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

Unit 6:
The Planning Cycle

Visual 6-27

Key Points

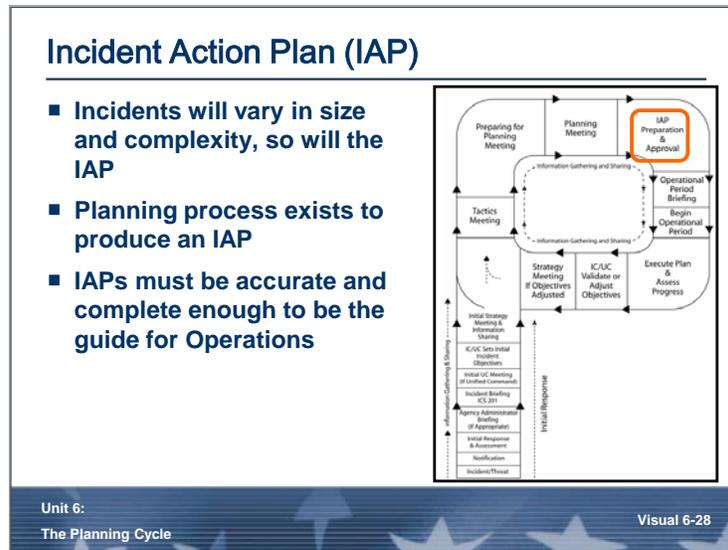
The Incident Action Plan is the written document that assures all personnel have a common understanding of the approved objectives, strategy, and tactics.

Incident Action Plan documents the actions developed during the Planning Meeting.

The plan specifies:

- Control objectives
- Tactics
- Resources
- Organization
- Communications Plan
- Medical Plan
- Other appropriate information

Topic Incident Action Plan



Key Points

Incidents vary in kind, size, complexity, and requirements, as will the Incident Action Plan. The Incident Action Plan provides a planning process for accomplishing incident objectives. The product of the planning process is the Incident Action Plan.

An Incident Action Plan must be prepared for each operational period and distributed prior to the Operational Briefing. The Incident Action Plan must be accurate and transmit information agreed upon during the planning process.

The Planning Cycle was developed to facilitate the development of an Incident Action Plan in an orderly and systematic manner. The Incident Action Plan is prepared by the Planning Section Chief with input from the appropriate Sections and Units of the Incident Management Team. Though it is written at the outset of the response, it should be continually revised and updated.

An Incident Action Plan is completed following each formal Planning Meeting conducted by the Incident Commander and the Command and General Staff. The plan must be approved by the Incident Commander prior to distribution. Sufficient copies of the Incident Action Plan will be reproduced and given to all supervisory personnel at the Section, Branch, and Leader levels.

The Planning Section Chief supervises the development, preparation, completion, duplication, and distribution of the Incident Action Plan.

- On smaller, less complex incidents, the Incident Commander may perform this task

- The content of the Incident Action Plan is incident-driven

The Incident Commander approves the completed Incident Action Plan.

The level of detail required in an Incident Action Plan will vary according to the size and complexity of the response. The plan must be accurate and completely transmit the information generated during the planning process.

TopicPurpose of the Incident Action Plan

Purpose of the Incident Action Plan (IAP)

- Safety of personnel
- Effectiveness of response operations
- Provides operational direction for incident personnel (who, what, when, where, and how)
- What are some other intended purposes?

Unit 6:
The Planning Cycle

Visual 6-29

Key Points

Incident Action Plan IAP

Incidents generally requiring written IAPs:

- Involve large number of resources
- Exceed one operational period
- Are requested by Incident Commander
- Are required by Agency



Unit 6:
The Planning Cycle

Visual 6-30

Key Points

Incidents that generally require written Incident Action Plans:

- Involve large number of resources
- Exceed one operational period
- Are managed by an Incident Commander who requests one
- Are managed by an agency that requires one

Topic Incident Action Plan (IAP) Components

IAP Components

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

See Handout 6-2: Sample IAP

Unit 6:
The Planning Cycle

Visual 6-31

Key Points

Usually an Incident Action Plan is composed of the following components:

- ICS Form 201 – Incident Objectives
- ICS Form 203 – Organization Assignment List
- ICS Form 204 – Assignment List
- ICS Form 205 – Radio Communications Plan
- ICS Form 206 – Medical Plan
- ICS Form 208 – ICS Safety Message
- ICS Form 220 – Air Operations (depends on the incident type)
- Traffic Plan (internal and external to the incident)
- Incident Map (top section or sketch)



Key Points

The incident name, date, and operational period all need to be on the cover of the Incident Action Plan. Check with the agency on any other policies regarding the cover or contents of the Incident Action Plan.

Be careful, sometimes cover art can add to the digital size of the document, making it hard to transfer files.

Some cover pages have space for a signature block (especially for Unified Command).

ICS Form 202

Incident Objectives Form

- Describes the basic incident strategy, control objectives, and provides weather information and safety considerations for use during the next operational period
- Prepared by the Planning Section Chief
- Approved by the Incident Commander



Unit 6:
The Planning Cycle
Visual 6-33

Key Points

Purpose

The ICS Form 202 – Incident Objectives Form is the first page of the Incident Action Plan. The Incident Objectives Form describes the basic incident strategy and control objectives, and provides weather information and safety considerations for use during the next operational period.

Preparation

The Incident Commander is responsible for preparing incident objectives. The Planning Section Chief may be delegated to prepare the form for the Incident Commander's approval. In preparing the form, it's important to:

- Consider total incident situation (political, legal, and fiscal)
- Describe strategy and control objectives
- Limit it to a single operational period
- If necessary, may include a specific operational task or objective
- Provide weather information
- Provide general safety information

ICS Form 204

Assignment List

- Identifies supervisors and contacts of given Division/Group for one operational period
- Prepared by the Resources Unit Leader under the guidance of the Operations Section Chief



Unit 6:
The Planning Cycle
Visual 6-35

Key Points

Purpose

The ICS from 204 – Assignment List is used to inform Operation Section personnel of incident assignments. Once the assignments are agreed upon by the Incident Commander and General Staff, the assignment information is given to the appropriate Units and Divisions. Each Division or Group will have its own page. The Assignment List:

- Identifies supervisors and contacts of given Division/Group for one operational period
- Identifies “TYPE”, “KIND,” and “NUMBER” of assigned resources for a given Division/Group for one operational period
- Identifies transportation method, location, and timing
- Identifies work assignments for given Division/Group for one operational period
- Provides special instructions and additional information (communications) for a given Division/Group for one operational period
 - Often the hazard mitigation measures identified on the ICS Form 215A are added in this section, as it is related to a specific Division or Group

Preparation

The Assignment List is normally prepared by the Resources Unit Leader using the guidance of the ICS Form 202 – Incident Objectives, ICS Form 215 – Operational Planning Worksheet, ICS Form 215A – Incident Safety Analysis, and the Operations Section Chief. The Assignment List must be approved by the Planning Section Chief. When approved, it is attached to the Incident Objectives as part of the Incident Action Plan.

Distribution

The Assignment List is duplicated and attached to the Incident Objectives and given to all recipients of the Incident Action Plan. In some cases, assignments may be communicated via radio.

ICS Form 205

Incident Radio Communications Plan

- Provides all radio frequency assignments for one operational period in one location
- Prepared by the Communications Unit Leader and given to the Planning Section Chief



Unit 6:
The Planning Cycle
Visual 6-36

Key Points

Purpose

ICS Form 205 provides all radio frequency assignments for one operational period in one location. This plan is the summary of information obtained from the ICS Form 216 – Radio Requirements Worksheet and the ICS Form 217 – Radio Frequency Assignments Worksheet. Frequency assignments on the Incident Radio Communications Plan are typically placed on the appropriate ICS Form 204 – Assignment List.

Preparation

The Incident Radio Communications Plan is prepared by the Communications Unit Leader (COML) and given to the Planning Section Chief.

Distribution

The Incident Radio Communications Plan is included in the IAP. Information from the plan is placed on the ICS Form 204 – Assignment List.



Key Points

The Incident Action Plan map is often prepared by the Situation Unit Leader, Display Processor, or Geographic Information System Technician. It provides detailed incident intelligence that may include:

- Areas of impact
- Clean-up process
- Recovery
- Areas sampled
- Areas being monitored and their status
- Restoration status
- Search status
- Debris removal status
- Reoccupation status
- Plume dispersion

Topic Additional Components of the Incident Action Plan

Additional Components of the IAP

- Predictions / assessments / analysis
- Weather forecast
- Air Operations Summary Worksheet (ICS Form 220)
- Human resource message
- Activity Log (ICS Form 214)
- Other blank forms as needed

Unit 6:
The Planning Cycle

Visual 6-40

Key Points

Weather Forecast

- Prepared by meteorologist or provided by weather service
- Provides current and predicted weather information

Expanded Safety Message

- Prepared by the Safety Officer
- Addresses specific safety concerns in detail

Human Resource Message

- Prepared by Human Resource Specialist
- Reminds incident personnel about mutual respect

Activity Log (ICS Form 214)

- If used or needed, it is prepared by Supervisors, Unit Leaders, Officers, and Chiefs
- Identifies significant events
- Blank ICS Form 214 placed in Incident Action Plan for distribution purposes

Miscellaneous Optional Attachments

- Logistics notes
- Finance notes
- Demobilization notes
- Facilities map (internal Traffic Plan map)

Topic Finalize, Produce, Distribute

Finalize, Produce, Distribute

- Identify **WHO** is responsible for each component
- Identify and communicate **WHEN** they are due
- Identify **WHO** will receive completed components
- Complete final review of the completed IAP

Unit 6:
The Planning Cycle

Visual 6-41

Key Points

The Planning Section Chief, with approval of the Incident Commander, determines what components will be included in the Incident Action Plan for each operational period. The Planning Section Chief is then responsible for the completion and distribution of the Incident Action Plan.

Review Incident Action Plan prior to the Operational Briefing for:

- Completeness
- Last-minute changes
- Up-to-date information
- Dropped pages
- Other errors

When finalizing, producing, and distributing materials, remember:

- Identify who is responsible for developing each component
- Identify when the components are to be completed and turned in to the Planning Section
- Identify where it should be delivered

- Identify who should receive the completed components
- Review all components for completeness and approvals
- Obtain Incident Commander's approval of completed Incident Action Plan
- Determine number of Incident Action Plans required
 - All incident personnel are determined by the Incident Management Team, usually down to the Unit Leader and Crew Boss level
 - Bulletin boards
 - Facilities outside incident base (camps, staging areas, and fixed-wing base)
 - Outside world
 - Agency Administrators/Management
 - Volunteers in Police Service
 - Extra copies
 - Complete Incident Action Plan
 - Incident Action Plan map only
- Arrange for reproduction of Incident Action Plan

Early Distribution of IAP

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

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



Key Points

Topic Distribute Incident Action Plans for Operational Briefing

Distribute IAP for Operational Briefing

- Approach varies with situation and number of personnel and copies
- Consider bundling for certain functions or groups
- Limited Incident Action Plan numbers will require controlled distribution
- Keep an original copy and corrected copy for documentation



Unit 6: The Planning Cycle Visual 6-43

Key Points

How you approach distribution of the Incident Action Plan varies with each situation as well as the number of personnel and copies. A limited number of Incident Action Plans will require controlled distribution. One option to consider is the bundling of Incident Action Plans for certain groups.

Remember to keep an original copy and a corrected copy for the Documentation Unit.

Once the Incident Action Plans have been distributed, evaluate the procedures with your staff. Make improvements or adjustments as necessary.

Distributing the Incident Action Plan for an Operational Briefing

- Approach varies with situation as well as the number of personnel and copies
- Consider bundling for certain functions or groups
- Limited Incident Action Plan numbers will require controlled distribution
- Submit original and corrected Incident Action Plans to Documentation Unit Leader
- Evaluate procedures and Incident Action Plan with your staff (make improvements or adjustments as necessary)
- Get ready to do it again

Topic

Prepare for Operational Briefing



Key Points

Topic Prepare for Operational Briefing

Prepare for Operational Briefing

- **Select Briefing Location**
 - Large enough
 - Quiet
 - Display area
 - Includes audio system, if needed
- **Select Briefing Time**
 - Prior to any operational period
 - Plan for 30 minutes
 - Plan for travel time



Unit 6:
The Planning Cycle

Visual 6-45

Key Points

Who should attend the Operational Briefing?

- Select briefing location
 - Large enough
 - Quiet
 - Display area
 - Includes audio system, if needed
- Select briefing time
 - Prior to any operational period
 - Plan for 30 minutes
 - Plan for travel time

Topic Prepare for Operational Briefing

Prepare for Operational Briefing

- Post time and location
- Determine who should attend
- Determine the number of Incident Action Plan copies needed
- Make sure units are preparing their displays
- Determine briefing agenda
- Make corrections to the Incident Action Plan



Handout 6-3: Operational Briefing Agenda

Unit 6:
The Planning Cycle

Visual 6-46

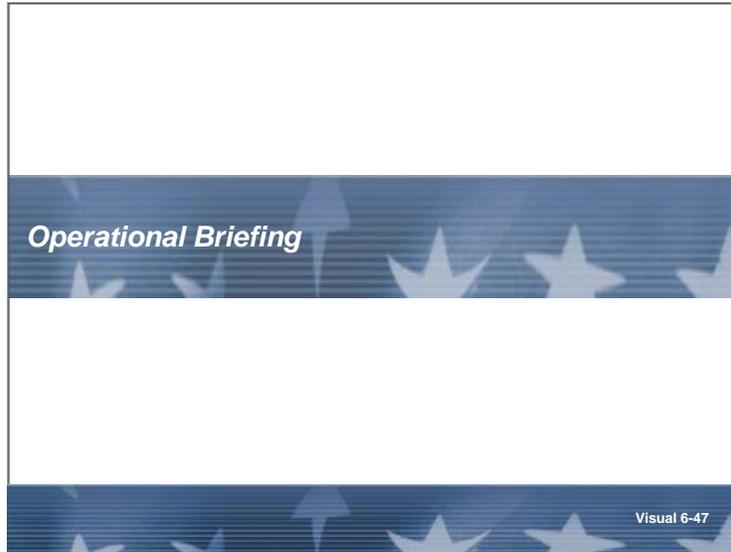
Key Points

Describe other tasks necessary to preparing for the Operational Briefing:

- Post time and location
- Determine who should attend
- Determine the number of Incident Action Plan copies needed
- Make sure units are preparing their displays
- Determine briefing agenda
- Make corrections to the Incident Action Plan

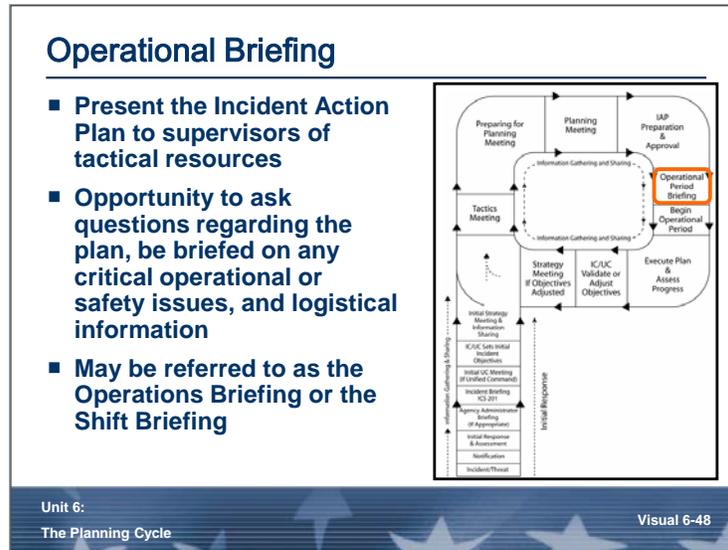
Topic

Operational Briefing



Key Points

Topic Operational Briefing



Key Points

An Operational Briefing, also referred to as the Operations Briefing or the Shift Briefing, is held at the beginning of each operational period to review the Incident Action Plan. It is the time when the Incident Action Plan is presented to supervisors of tactical resources, and presents the opportunity to ask questions regarding the plan, be briefed on any critical operational or safety issues, and logistical information. If needed, each member of the Command and General Staff who has a part in the Incident Action Plan makes a short presentation to clarify procedures.

The Planning Section Chief and Operations Section Chief share the responsibility for the Operational Briefing. The Planning Section Chief is responsible for facilitating the briefing. The Operations Section Chief has the responsibility to ensure that all operations personnel are adequately briefed. This may require additional briefings after the primary Operational Briefing.

Operational Briefing

- Conducted at the start of each operational period
- All supervisors of tactical resources should attend at a minimum
- Planning Section Chief facilitates the briefing following a concise agenda



Unit 6:
The Planning Cycle

Visual 6-49

Key Points

The Operational Briefing is conducted at the beginning of each operational period. All of the supervisors of the tactical resources to be employed during that period should attend. In some cases, all of the tactical personnel should attend if they can be accommodated. The Planning Section Chief facilitates the briefing following a concise agenda.

Key Participants

Key individuals providing input:

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



Unit 6:
The Planning Cycle

Visual 6-50

Key Points

Topic Planning Section Chief Responsibilities

Planning Section Chief Responsibilities

- **During the Operational Briefing the Planning Section Chief has a number of responsibilities, including:**
 - **Handing out Incident Action Plans before starting**
 - **Keeping the briefing focused and brief, less than 30 minutes if possible**
 - **Identifying location of Division/Group meetings after the Operational Briefing**
- **What are some additional responsibilities?**

Unit 6:
The Planning Cycle

Visual 6-51

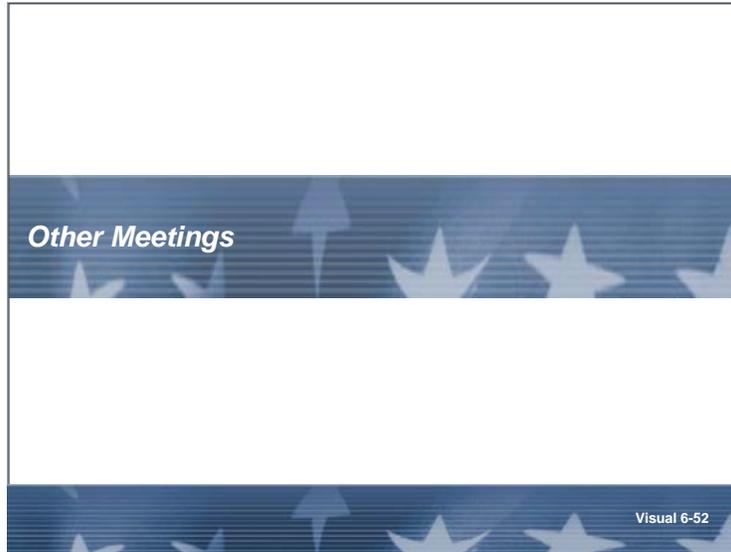
Key Points

Planning Section Chief's responsibilities at the Operational Briefing include:

- Handing out Incident Action Plans before starting
- Keeping briefing focused and brief, less than 30 minutes if possible
- Adhering to agenda
- Pointing out any changes to the written plan
- Assigning someone to document any changes to the plan made at the briefing
- Identifying location of Division/Group breakout meetings after the Operational Briefing
- Arranging for placement of unassigned resources with Resources Unit Leader

Topic

Other Meetings



Key Points

Topic Other Meetings and Briefings

Other Meetings and Briefings

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

Unit 6:
The Planning Cycle

Visual 6-53

Key Points

These meetings are not mandatory and do not have a set time or location. They are set up as needed. The Planning Section Chief may be responsible for attending and facilitating a number of these meetings. The following slides will explain the purpose of each meeting.

Other meetings and briefings include:

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

Topic Command and General Staff Meetings

Command and General Staff Meetings

- Discuss important information that affects team
- Incident Commander determines involvement
- Planning Section Chief may be asked by Incident Commander to facilitate
- Need quiet time to assemble team



Unit 6:
The Planning Cycle

Visual 6-54

Key Points

The Command and General Staff Meetings are used to discuss important information that affects the team. They are usually called by the Incident Commander but may be on a regular schedule (i.e., daily or every other day). They are typically scheduled during a slow period. The level of involvement is determined by the Incident Commander.

Command and General Staff Meetings can be held over lunch. You need frank discussions on problems to be successful.

Transition Meetings

- Conducted when teams transition or turn back to local management
- Incident Commander may assign Planning Section Chief to facilitate this meeting



Unit 6:
The Planning Cycle

Visual 6-55

Key Points

Transition Meetings are conducted when the incident is transitioning from one Incident Management Team to another Incident Management Team or being turning back over to local control. The Incident Commander may assign the Planning Section Chief to facilitate a Transition Meeting.

The Planning Section Chief from the existing team will probably facilitate.

Topic Debriefing/Close-out Meetings

Debriefing/Close-out Meetings

- Agency Administrator is usually present
- May be held during Transition Meeting
- Planning Section Chief may be asked to facilitate



Unit 6:
The Planning Cycle

Visual 6-56

Key Points

Debriefing/Close-out Meetings are usually held with the Agency Administrator (AA). They may be held in conjunction with the Transition Meeting. The Planning Section Chief may be assigned by the Incident Commander to facilitate.

Debriefing/Close-out Meetings are the time when you meet with the Agency Administrator/Executive and report your accomplishments in relation to your assigned tasks. Probably not too many Type III or Type IV teams have had to attend Debriefing/Close-out Meetings.

Often a document called an Executive Summary or Close-out Narrative is put together. In this document you include:

- Successes
- Challenges
- Recommendations for future

Public Meetings

- **Planning Section Chief does not usually attend unless requested by the Incident Commander**
- **Timing and involvement determined by the Incident Commander**
- **May be asked for a public appearance**



Unit 6:
The Planning Cycle

Visual 6-57

Key Points

Topic Agency-Specific Reviews and Accident Investigations

Agency-Specific Reviews and Accident Investigations

- Planning Section Chief involved by Incident Commander request
- Timing and involvement determined by Incident Commander
- Be aware of possible distraction from Planning Section Chief job during response or incident

Unit 6:
The Planning Cycle

Visual 6-58

Key Points

The Planning Section Chief is only involved in Agency-Specific Reviews or Accident Investigations if requested to do so by the Incident Commander. The timing and involvement for these reviews is determined by the Incident Commander.

Topic

Planning Section Meetings

Planning Section Meetings

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

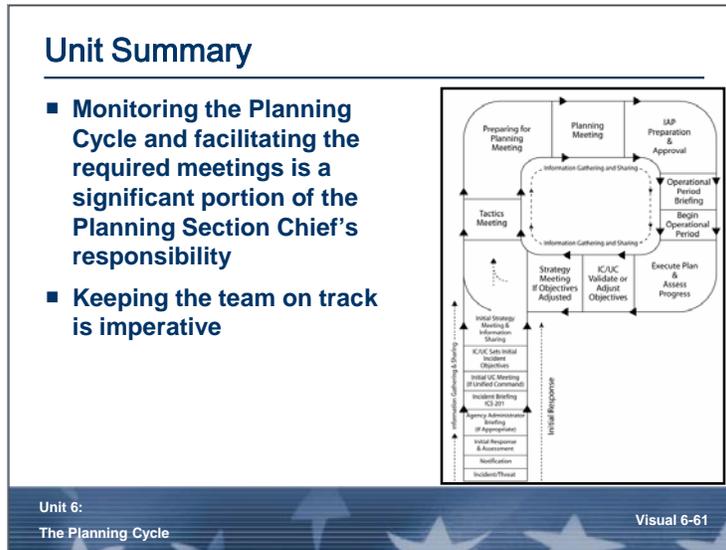
Unit 6:
The Planning Cycle

Visual 6-59

Key Points

The purpose of these meetings is to check on the “Planning Family” and coordinate within Units. It is a good time for problem solving. Depending on the situation, you may want to schedule a Planning Section Meeting every couple of days. Plan the meeting during a slow time for maximum attendance.

These meetings are a great opportunity for you to show leadership within your Section. Make sure that you are monitoring the activity within your Section. You may have to shift things around to help the people who are most overwhelmed.



Key Points

Monitoring the Planning Cycle and facilitating the meetings is a major portion of the Planning Section Chief's responsibilities. Keeping the team on track is imperative.

Objectives Review

1. *What is the Planning Section Chief's role in the Planning Meeting?*
2. *What is the purpose of the Incident Action Plan?*
3. *What are the components of the Incident Action Plan and who is responsible for preparing them?*
4. *What is the Planning Section Chief's role in the Incident Action Plan?*

Key Points

Unit Terminal Objective

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

Unit Enabling Objectives

- Describe the Planning Section Chief's role in the Planning Meeting
- Describe the purpose of the Incident Action Plan
- Describe the components of the Incident Action Plan and who is responsible for preparing them
- Describe the Planning Section Chief's role in the Incident Action Plan

Topic Objectives Review (cont.)

Objectives Review (cont.)

5. Who approves the Incident Action Plan?

6. What is the Planning Section Chief's role in the Operational Briefing?

7. What other Incident Management Team meetings and briefings might the Planning Section Chief attend?

Unit 6:
The Planning Cycle

Visual 6-62

Key Points

Unit Enabling Objectives (cont.)

- Identify who approves the Incident Action Plan
- Describe the Planning Section Chief's role in the Operational Briefing
- Identify other Incident Management Team meetings and briefings that the Planning Section Chief may attend