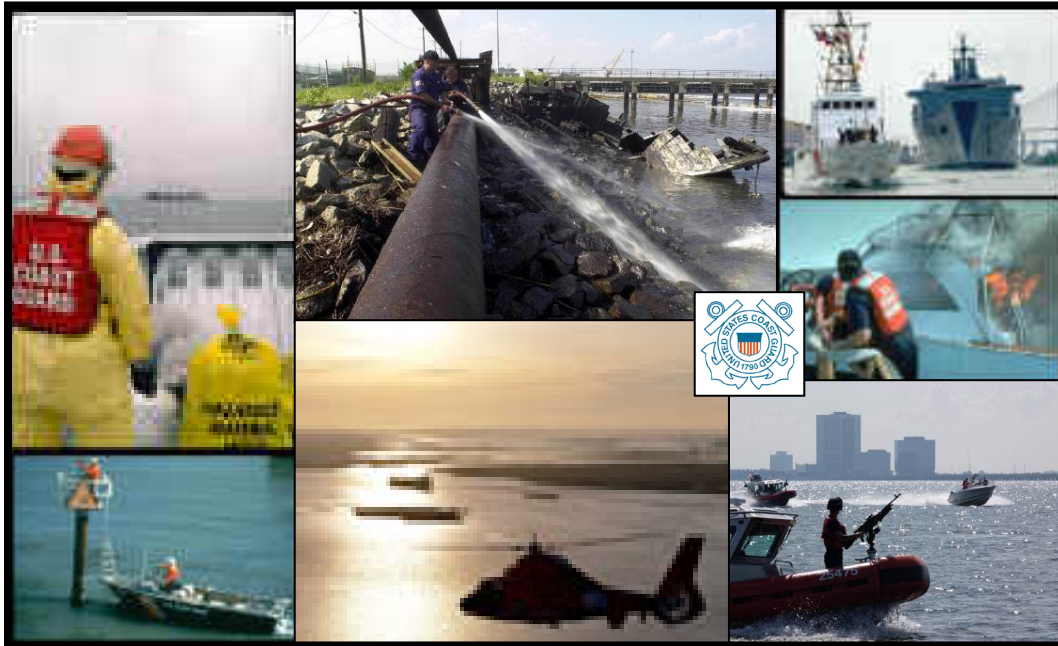




U. S. Coast Guard



National Incident Management System Incident Command System PLANNING SECTION CHIEF TYPE 3 Performance Qualification Standard

November 2014

U.S. COAST GUARD CERTIFICATION LETTER

**RECOMMENDATION / CERTIFICATION OF COMPLETED PERFORMANCE
QUALIFICATION STANDARD (PQS) FOR THE POSITION OF**

TYPE 3 PLANNING SECTION CHIEF (PSC3)

FINAL VERIFYING OFFICER'S RECOMMENDATION

I verify that _____ has completed all requirements necessary to perform the duties in this position, has passed a unit level oral board and should therefore be considered for certification in this position.

FINAL VERIFYING OFFICER'S SIGNATURE AND DATE

FINAL VERIFYING OFFICER'S PRINTED NAME, TITLE, DUTY STATION, AND PHONE NUMBER

U. S. COAST GUARD CERTIFICATION

Note: The Certifying Official is the local unit Commanding Officer (O-4 or above) for Type 3 and Type 4 positions. See page 3 below for more information.

I certify that _____ has met all requirements for qualification in this position and that such qualification has been issued. You are authorized to carry out the responsibilities of this position within the scope of your qualification.

This Letter of Certification should be retained as part of your personal Training Record.

THIS CERTIFICATION IS GOOD FOR SEVEN YEARS FROM DATE OF ISSUE.

CERTIFYING OFFICIAL'S SIGNATURE AND DATE

CERTIFYING OFFICIAL'S PRINTED NAME, TITLE, DUTY STATION, AND PHONE NUMBER

U.S. Coast Guard
Performance Qualification Standard (PQS) for
Type 3 Planning Section Chief (PSC3)
Qualification Code: ICS-PSC3

This booklet is one section of your personal on-the-job training manual and the Performance Qualification Standard (PQS) for the position noted above. It is your guide to qualification. It is your responsibility to document completed unit training items.

When you have completed all of the items required for this qualification, your command will issue a Letter of Certification (example on page 2) and your Unit Training Coordinator will record and certify your qualification in the Training Management Tool (TMT).

For additional information concerning background, objectives, guidance, components, responsibilities and explanation as to the use of the National Incident Management System (NIMS) Incident Command System (ICS) PQS, see the USCG All-Hazard NIMS ICS PQS Guide. The Guide can be found in the ICS Library on Homeport (<http://homeport.uscg.mil/ics/>).

RESPONSIBILITIES:

1. The Certifying Official is responsible for:

- Selecting trainees based on the needs of the unit.
- Providing opportunities for evaluation and / or making the trainee available for evaluation.
- Determining certification by reviewing the trainees PQS Workbook to ensure all tasks and course prerequisites have been completed.
- Issuing proof of certification by signing a certification letter.
- Ensuring certification / qualification is entered into the TMT system. Each task in the PQS includes the TMT task code right after the number of the task.

2. The Individual is responsible for:

- Reviewing and understanding instructions in the PQS.
- Providing background information to a Verifying Officer.
- Completing all tasks for an assigned position within three years. All tasks with an approval older than three years must be reevaluated.
- Assuring the Evaluation Record is complete.
- Notifying local unit personnel when the PQS is completed and providing a copy to the unit training officer.
- Keeping the original PQS in personal records.

3. The Verifying Officer is responsible for:

- Being certified in the competencies that he or she is to verify. Verifying Officer must be command (unit) designated.
- Entering his or her title, name, and initials in the Record of Verifying Officers section before making entries in the PQS.
- Being experienced and qualified with demonstrated ability to evaluate, instruct, and observe other personnel in the performance task criteria.
- Meeting with the trainee and determining past experience, current qualifications, and desired objectives / goals.
- Explaining to the trainee the evaluation procedures that will be utilized and which objectives may be attained.

- Identifying tasks to be performed during the evaluation period.
- Observing successful performance of each task and documenting such with date and initials in the appropriate space provided in this booklet. It may be necessary to perform a task several times.
- Accurately evaluating and recording demonstrated performance of tasks on both the task and Evaluation Record. Dating and initialing completion of the task and documenting incident / event performance on an evaluation record shall document satisfactory performance. Each task must be signed off individually (e.g., initialing the first and last task with a line down the page will NOT be acceptable). Unsatisfactory performance shall also be documented in the Evaluation Record. The Verifying Officer will not give credit for any task that is not performed satisfactorily.
- Completing the Evaluation Record found at the end of each PQS for each incident / event / exercise performance.

4. The Final Verifying Officer is responsible for:

- Being qualified and proficient in the position being evaluated.
- Reviewing the trainee's record to ensure completeness.
- Scheduling and conducting a final qualification interview / board for the member for the desired position.
- Signing the verification statement on page 2 of the PQS when all tasks have been initialed and the oral board has been passed.
- Ensuring that all tasks have been completed within the three years prior to submission for final approval. Any task with an approval older than three years must be reevaluated and brought up to date.

5. The Training Officer or Designee of the member's / employee's home unit is responsible for:

- Issuing PQS to document task performance.
- Explaining to the trainee the purpose and processes of the PQS as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Identifying incident evaluation opportunities.
- Identifying and assigning a Verifying Officer who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance.
- Conducting progress reviews.
- Conducting a closeout interview with the trainee and Verifying Officer and assuring that documentation is proper and complete.
- Ensuring course completions and other PQS tasks and certifications are entered into the TMT system.

PLANNING SECTION CHIEF TYPE 3 (PSC3)

| | |
|---|--|
| REQUIRED TRAINING | ICS-100 (IS-100.B) <i>Introduction to ICS</i> , ICS-200 (IS-200.B) <i>ICS for Single Resources and Initial Action Incidents</i> , ICS-300 <i>Intermediate ICS for Expanding Incidents</i> , ICS-400 <i>Advanced ICS</i> , and ICS-440 <i>Planning Section Chief</i> |
| PREREQUISITE | Qualification as a Type 3 Situation Unit Leader (SITL3) or Type 3 Resources Unit Leader (RESL3) |
| TARGET PERSONNEL | Response and Prevention Dept Personnel and Planning Div personnel; Incident Management Assist Team and any other personnel filling Planning section roles in response |
| CERTIFYING OFFICIAL | Commanding Officer (O-4 and above), or the first O-6 in the chain command, or COMDT (CG-CPE) |
| FITNESS STANDARD | Light |
| CURRENCY | 7 year sliding currency |
| CURRENCY REQUIREMENTS | <u>Once every 3 years:</u> Complete online ICS-305 <i>Intermediate ICS Refresher</i> . <u>At least once every 7 years:</u> Satisfactory performance as an PSC3 or other position assignment listed below in an actual incident/ event, drill / exercise using ICS documented on an ICS-225 and update "Perform Position" task in TMT. |
| OTHER POSITION ASSIGNMENTS THAT WILL MAINTAIN CURRENCY | RESL3, SITL3, ICT3, SITL1, RESL1, PSC2, PSC1, ICT2, ICT1 |

| RECORD OF VERIFYING OFFICERS | | | | |
|-------------------------------------|--------------|---------------------------------|-----------------|-----------------|
| Date | Title | Verifying Officer's Name | ICS Qual | Initials |
| | | | | |
| | | | | |
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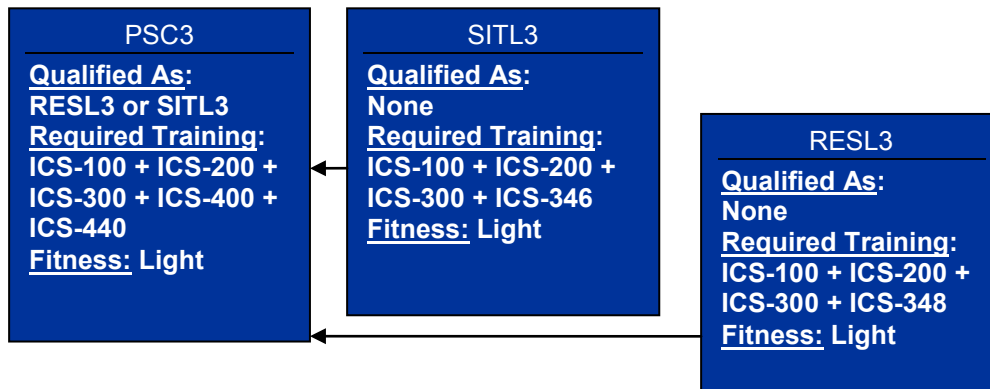
| PSC3 RECORD OF COMPLETION | | |
|--|-------------|--------------------------------------|
| Competency Requirements | Date | Verifying Officer's Signature |
| A. Completion of Training Courses: | | |
| 1. ICS-100 (IS-100.B) <i>Introduction to ICS</i> | | |
| 2. ICS-200 (IS-200.B) <i>ICS for Single Resources and Initial Action Incidents</i> | | |
| 3. ICS-300 <i>Intermediate ICS Course</i> | | |
| 4. ICS-400 <i>Advanced ICS Course</i> | | |
| 5. ICS-440 <i>Planning Section Chief Course</i> | | |
| B. ICS Qualification Prerequisites (Circle) Qualification as a Type 3 Situation Unit Leader (SITL3) or Type 3 Resources Unit Leader (RESL3) | | |
| C. Completion of PSC3 PQS | | |
| D. Successful completion of unit level oral board | | |
| E. Qualification / Certification Letter (page 2) submitted for approval | | |
| F. Qualification certification entered into TMT | | |

Waivers: ICS Qualification Prerequisite for certification as SITL3 or RESL3, task B. above, may be waived for O-4 or above until 30 SEP 2019. This includes the position training requirements for SITL3 (ICS-346) or RESL3 (ICS-348). If the member desires the SITL3 or RESL3 certification, they must complete the requirements for the desired position. The general ICS and Federal Emergency Management Agency (FEMA) IS training requirements cannot be waived (e.g., ICS-100, ICS-200, ICS-300, and ICS-400). The PSC (ICS-440) course requirement cannot be waived.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

ICS Position Qualification Flow Chart for PSC3

This chart is NOT an ICS organization chart. This chart shows the Type 3 progression from one ICS position to another within the qualification system. Each box within the chart contains information pertaining to the position. Job Titles are listed as abbreviations for the position. Please see Homeport ICS library for a list of NIMS ICS Position Abbreviations / Mnemonics. The PQS Qualification Guide has more information about position qualification process and guidance.



Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

Task Codes: Each task has a code associated with the type of training assignment where the task may be completed. These include: O = other, I = incident / event and R = rare event. Definitions for these codes may be found below*. Although tasks can be performed in any situation, they must be evaluated on the specific type of incident / event for which they are coded. Tasks coded I must be evaluated on an incident / event, and so on. Performance of any task on other than the designated assignment is not valid for qualification. **If more than one code is listed, the task may be completed on any of the listed situations (e.g., If code I, O2 and O3 are listed, the task may be completed on any of the three listed).**

*Code:

- O = Task can be completed in a variety of situations, such as in a classroom, exercise or simulation, incident or event, or daily job.
- O1 = Task must be performed on a Full Scale Exercise with equipment deployment which is managed under the ICS. Examples of exercises that may employ ICS include oil spill, search and rescue, hazardous material response, and fire.
- O2 = Task must be performed on an Exercise which is managed under the ICS. Examples of exercises that may employ ICS include oil spill, search and rescue, hazardous material response, and fire.
- O3 = Training or Daily Job environment that tests knowledge / skills associated with the task.
- O4 = ICS course classroom environment that tests knowledge / skills associated with the task.
- I = Task must be performed on an incident or event which is managed under the ICS. Examples of incidents and events that may employ ICS include oil spill, search and rescue, hazardous material response, fire, and emergency or non-emergency (planned or unplanned) events.
- R = Rare events seldom occur and opportunities to evaluate Trainee performance in real settings are limited. Examples of rare events include accidents, injuries, vehicle and aircraft crashes. Through interviews, the Verifying Officer may be able to determine if the Trainee could perform the task in a real situation.

Competency 1: Assume position responsibilities.

Description - Successfully assume role of Planning Section Chief and initiate position activities at the appropriate time according to the following behaviors.

Behavior: Ensure readiness for assignment.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 1. ICS-GEN-01. Obtain and assemble information and materials needed for appropriate deployment kits. <ul style="list-style-type: none"> • Personal kit • Unit Leader / Section Chief kit • See list in PSC aid job | O | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

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

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 2. ICS-T3-SC-01. Ensure availability of Planning Section staff. | O | | |
| 3. ICS-T3-PSC-03. Identify units with the section to be activated and evaluate staffing requirements. <ul style="list-style-type: none"> • Other agency personnel • Technical specialist needs | O | | |
| 4. ICS-T3-SC-02. Prepare and submit initial resource request (ICS-213RR) for staffing. | O | | |
| 5. ICS-T3-PSC-05. Ensure meeting location is well organized and required resources in place prior to meetings. <ul style="list-style-type: none"> • See PSC Job aid for meeting layout • Poster-sized ICS-215 and ICS-215A • Large maps / charts of incident • Turn charts and markers • Agenda | O | | |

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

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 6. ICS-T3-SC-04. Collect information from outgoing PSC or other personnel responsible for incident prior to arrival. <ul style="list-style-type: none"> • Status of incident and assigned resources • Status of existing Planning Section | I O2 O3 | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| <p>7. ICS-T3-SC-03. Obtain initial briefing from immediate supervisor and / or Incident Commander.</p> <ul style="list-style-type: none"> • Incident information <ul style="list-style-type: none"> - ICS-201, Incident Briefing - ICS-202, Incident Objectives - IAP - Situation Analysis, Implementation Plan, or Contingency Plan - Copy of the most recent ICS-209, Incident Status Summary - Map / charts(s) of the incident. • Organizational structure (unified command or single organization) • Special considerations on the incident • Current national situation • Resources assigned, enroute and on order • Facilities established and operating • Anticipated incident duration, size, and type Copies of current Resource Requests (ICS-213RR-CG), Forms and resources committed to incident • Key contact list with phone and fax numbers | O | | |
| <p>8. ICS-T3-SC-05. Attend Command and General Staff meeting and obtain briefing from Incident Commander.</p> <ul style="list-style-type: none"> • Incident Commander’s priorities, goals, and objectives for IMT and the incident • Instructions concerning the tasks expected of the Operations Section • Expected timeframes for briefings, planning meetings, and team meetings | O | | |

Behavior: Establish effective relationships with relevant personnel.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| <p>9. ICS-T3-SC-06. Establish and maintain positive interpersonal and interagency working relationships.</p> <ul style="list-style-type: none"> • Federal, State, Local agencies, private industry, non-government organizations and tribal leaders. • Hosting unit • Command and general staff | O | | |

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POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 10. ICS-T3-SC-07. Create a work environment that provides mutual respect and equal opportunity for all personnel assigned to the incident. | O | | |

Behavior: Establish organization structure, reporting procedures, and chain of command of assigned resources.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 11. ICS-T3-PSC-11. Plan and activate section. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role. | O | | |
| <ul style="list-style-type: none"> Identify units within the section to be activated and request resources for section operation. Identify work space requirements and determine locations. Brief unit leaders on current and anticipated activity. Provide initial operating instructions to section personnel. | I O2 O3 | | |
| 12. ICS-T3-PSC-12. Determine Technical Specialist requirements and maintain awareness of their status. <ul style="list-style-type: none"> Direct Technical Specialists assigned to the Planning Section. | I O2 O3 | | |

Behavior: Understand and comply with ICS concepts and principles.

| TASK | C O D E | EVAL RECORD # | Verifying Officer: Initial & date upon completion of task |
|---|------------------|---------------------|---|
| 13. ICS-T3-SC-08. Maintain appropriate span of control. | O | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | Verifying Officer: Initial & date upon completion of task |
|--|------------------|---------------------|---|
| 14. ICS-T3-SC-09. Demonstrate knowledge of NIMS ICS Concepts and Principles. <ul style="list-style-type: none"> • Chain of Command • Unity of Command • ICS forms • ICS terminology • Operational Planning process • Span of Control • Resource management • Scope, roles, responsibilities, jurisdiction, and authority | O | | |

Competency 2: Lead assigned personnel.

Description - Influence, guide, and direct assigned personnel to accomplish objectives and desired outcomes in a rapidly changing, high-risk environment.

Behavior: Model leadership values and principles.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 15. ICS-GEN-11. Exhibit principles of devotion to duty. <ul style="list-style-type: none"> • Be proficient in your job, both technically and as a leader. • Make sound and timely decisions. • Ensure tasks are understood, supervised and accomplished. • Develop your subordinates for the future. | O | | |
| 16. ICS-GEN-12. Exhibit principles of respect. <ul style="list-style-type: none"> • Know your subordinates and look out for their well-being. • Keep your subordinates informed. • Build the team. • Employ your subordinates in accordance with their capabilities. | O | | |

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POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 17. ICS-GEN-13. Exhibit principles of honor and integrity. <ul style="list-style-type: none"> • Know yourself and seek improvement. • Seek responsibility and accept responsibility for your actions. • Set the example. | O | | |

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

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 18. ICS-T3-SC-11. Recognize potentially hazardous situations and ensure assigned personnel follow safety guidelines appropriately. <ul style="list-style-type: none"> • Site Safety Plan (ICS-208) • GAR Model • Safety messages • Work / rest guidelines. | I O1 O3 | | |

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

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 19. ICS-T3-SC-12. Manage operational periods to achieve objectives. <ul style="list-style-type: none"> • Evaluate need to adjust operational periods or work shifts and make appropriate recommendations to IC. • Ensure adequate work / rest ratio. | I O1 O3 | | |
| 20. ICS-T3-SC-13. Ensure subordinates understand assignment for operational period and for meetings. | O | | |
| 21. ICS-T3-PSC-21. Demonstrate knowledge of duties of a Situation Unit Leader. | O | | |
| 22. ICS-T3-PSC-22. Demonstrate knowledge of duties of a Resources Unit Leader. | O | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 23. ICS-T3-PSC-23. Demonstrate knowledge of duties of a Demobilization Unit Leader. | O | | |
| 24. ICS-T3-PSC-24. Demonstrate knowledge of duties of a Documentation Unit Leader. | O | | |
| 25. ICS-T3-PSC-25. Demonstrate knowledge of duties of an Environmental Unit Leader. | O | | |
| 26. ICS-T3-PSC-26. Demonstrate knowledge of duties of a Marine Transportation System Recovery Unit Leader. | O | | |
| 27. ICS-T3-SC-14. Continuously evaluate performance. <ul style="list-style-type: none"> • Communicate performance standards. • Communicate if deficiencies found immediately and take corrective action. • Provide training opportunities where available. • Provide feedback to personnel according to guidelines (ICS-225). | O | | |

Behavior: Coordinate interdependent activities.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|---|
| 28. ICS-T3-PSC-28. Interact and coordinate with command staff, general staff and appropriate unit leaders. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role. | I O2 O4 | | |
| <ul style="list-style-type: none"> • Receive and transmit current and accurate information. • Communicate changes to the Incident Action Plan (IAP) or relevant plans. • Ensure the Resources Unit Leader is advised of changes in status of resources assigned to the operation. Keep status current. | I O2 | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

Behavior: Emphasize teamwork.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|------------------|---|
| 29. ICS-GEN-17. Establish cohesiveness among assigned personnel. | O | | |

Competency 3: Communicate effectively.

Description - Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high-risk environment.

Behavior: Ensure relevant information is exchanged during briefings and debriefings.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 30. ICS-T3-PSC-30. Facilitate the Command and General Staff meeting. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420, or 440) can only be done once, must be during class exercise, and must have filled the PSC role. <ul style="list-style-type: none"> As per the Incident Management Handbook, perform PSC role in the Command and General Staff meeting. | I O1 O4 | | |
| | I O1 | | |
| 31. ICS-T3-PSC-31. Facilitate the Tactics meeting. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role. <ul style="list-style-type: none"> As per the Incident Management Handbook, perform PSC role in the tactics meeting. | I O1 O4 | | |
| | I O1 | | |
| 32. ICS-T3-PSC-32. Facilitate the Planning meeting. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role. <ul style="list-style-type: none"> As per the Incident Management Handbook, perform PSC role in the planning meeting. | I O1 O4 | | |
| | I O1 | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 33. ICS-T3-PSC-33. Facilitate the Operations briefing. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role. <ul style="list-style-type: none"> • As per the Incident Management Handbook, perform PSC role in the operations briefing | I O1 O4 | | |
| | I O1 | | |
| 34. ICS-T3-PSC-34. Participate in debrief of off going ops personnel to evaluate IAP effectiveness. This task must be completed at two different incidents / events or exercises. | I O1 | | |
| 35. ICS-T3-SC-18. Participate in briefings and debriefings. <ul style="list-style-type: none"> • Hotwash • Lessons learned • After Action Reporting (AAR) • VIP visits | I O1 | | |

Behavior: Ensure documentation is complete and disposition is appropriate.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 36. ICS-T3-PSC-36. Review and verify Incident Status Summary (ICS-209). <ul style="list-style-type: none"> • Accurate and complete • Priorities and special considerations • Within established timeframes | O | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| | | | |
|---|-----------------|--|--|
| <p>37. ICS-T3-PSC-37. Ensure incident documentation is completed as required by the Incident Commander. This task must be completed at two different incidents / events or exercises.</p> <ul style="list-style-type: none"> • IAP • Unit Log (ICS-214) • Incident Status Summary (ICS-209) • Personnel and equipment time records (CG 5136) to Time Unit Leader for each operational period • Resource Requests (ICS-213RR). • Open Action Tracking Worksheet (ICS-233) • Performance evaluations (ICS-225) for Planning Section staff when demobilized. | <p>I O2</p> | | |
|---|-----------------|--|--|

Behavior: Gather, produce and distribute information as required by established guidelines and ensure understanding by recipient.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------------|---------------------|---|
| <p>38. ICS-T3-PSC-38. Publish, distribute, and post daily meeting schedule (ICS-230).</p> | <p>O</p> | | |
| <p>39. ICS-T3-PSC-39. Inform identified attendees of meeting / briefing times, locations, and information expected of them. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role.</p> <ul style="list-style-type: none"> • Define meeting / briefing objectives, agenda, and time expectations (IMH Chapter 3). • Post agenda at appropriate locations. | <p>I O2 O4</p> | | |
| | <p>I O2</p> | | |
| <p>40. ICS-T3-PSC-40. Review draft IAP for completeness and submit to Incident Commander for approval. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420 or 440) can only be done once, must be during class exercise.</p> | <p>I O2 O4</p> | | |
| | <p>I O2</p> | | |
| <p>41. ICS-T3-PSC-41. Ensure distribution of copies of IAP at the operational briefing.</p> | <p>O</p> | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|---|
| 42. ICS-T3-SC-19. Prepare Transition Brief. | O | | |
| 43. ICS-T3-PSC-43. Update Incident Commander on current accomplishments and / or problems. | O | | |

Behavior: Communicate and ensure understanding of work expectations within the chain of command and across functional areas.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 44. ICS-T3-PSC-44. Ensure presenters at meetings and briefings are aware of and adhere to responsibilities. <ul style="list-style-type: none"> • Command and General Staff meeting • Objectives Meeting • Tactics meeting • Planning meeting • Operational briefing | O | | |
| 45. ICS-T3-PSC-45. Planning staff has specific assignments and responsibilities to support the incident. <ul style="list-style-type: none"> • Division of duties • Work parameters | O | | |
| 46. ICS-T3-PSC-46. Evaluate and share incident information as appropriate within the chain of command and across functional areas. | O | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

Behavior: Develop and implement plans and gain concurrence of affected agencies and / or the public.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| <p>47. ICS-T3-PSC-47. Ensure planning staff completes and compiles required elements of the IAP within required timeframes. This task must be completed at two different incidents / events or exercises. Classroom environment (320, 420 or 440) can only be done once, must be during class exercise, and must have filled the PSC role.</p> <ul style="list-style-type: none"> • Obtain elements from other appropriate sections. • Assemble the elements into an IAP. • Ensure the IAP links management and control objectives with strategies and tactics. • Obtain the Incident Commander’s approval and signature on IAP. • Identify how many copies of IAP are needed. | I O2 O4 | | |
| <p>48. ICS-T3-PSC-48. Develop and implement a plan for transfer of command if IC’s change.</p> <ul style="list-style-type: none"> • Contains accurate assessment of the situation. • Identify incident needs. • Include date and time of transition and transfer of command. • Complete transition of functional duties in a timely, smooth, and efficient manner. • Facilitate transfer of command meeting. • Brief subordinates. | O R | | |
| <p>49. ICS-T3-PSC-49. Ensure planning staff completes or supports completion of other relevant plans within required timeframes.</p> <ul style="list-style-type: none"> • Evacuation plan • Salvage plan • Lightering plan • Dive plan • Decontamination plan • Transfer of command plan • Contingency plan(s) as needed (evacuation / sheltering, protection) | I O2 O3 | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

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

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

Behavior: Administer and / or apply agency policy, contracts and agreements.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 50. ICS-T3-SC-21. Apply agency policy, priorities, limitations and constraints, and political and environmental considerations when reviewing and developing plans. <ul style="list-style-type: none"> • Strategic plans • IAP or other relevant plans • Cost containment | O | | |
| 51. ICS-T3-PSC-51. Ensure work / rest guidelines and length of assignments are monitored and followed. | O | | |
| 52. ICS-T3-SC-20. Ensure release priorities address contractual requirements. <ul style="list-style-type: none"> • Coordinate with Finance / Administration | I O R | | |

Behavior: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 53. ICS-T3-PSC-53. Evaluate and monitor current situation to determine if present plan of action will meet incident objectives. This task must be completed twice. <ul style="list-style-type: none"> • Use technical specialists, operations personnel, and / or agency personnel. • Advise command and general staff of significant changes in incident status in a timely manner. | I O2 | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

Behavior: Take appropriate action based on assessed risks.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 54. ICS-T3-PSC-54. Ensure the Risk Management Process is established and maintained. | O | | |

Behavior: Modify approach based on evaluation of incident situation.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 55. ICS-T3-PSC-55. Draft / review and revise incident objectives for the Incident Commander. This task must be completed at two different incidents / events or exercises. Classroom environment (320 or 440) can only be done once, must be during class exercise. | I O | | |
| | I O2 O3 | | |
| 56. ICS-T3-PSC-56. Monitor incident status and develop alternative plans, strategies and tactics as necessary. | O | | |
| 57. ICS-T3-PSC-57. Revise planning cycle when appropriate. <ul style="list-style-type: none"> Meeting time and location Recommend revised operational periods as needed | O | | |

Behavior: Plan for demobilization and ensure demobilization procedures are followed.

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| 58. ICS-T3-SC-22. Anticipate demobilization of personnel and equipment. <ul style="list-style-type: none"> Identify excess personnel and equipment. Prepare schedule for demobilization | I O3 | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|---|------------------|---------------------|--|
| <p>59. ICS-T3-PSC-59. Obtain objectives, priorities, schedules, and constraints for the incident demobilization plan.</p> <ul style="list-style-type: none"> • Consult with Operations Section Chief, Resource Unit Leader, Agency representatives / Liaison Officer, and Logistics Section Chief. • Draft release priorities. • Develop a mutually acceptable format for exchange of demobilization information with expanded dispatch. • Collect demobilization guidelines from agencies and / or coordination center (e.g., work, rest, communication, and travel guidance). • Contact section chiefs and unit leaders to obtain incident level direction (e.g., debriefs, lessons learned, evaluations, equipment turn in, medical checkout, CISM...). | I O2 O3 | | |
| <p>60. ICS-T3-PSC-60. Prepare incident demobilization plan within established time frames.</p> <ul style="list-style-type: none"> • General information section • Responsibility section • Release section • Release procedure section • Travel information section • Emergency demobilization section | I O2 O3 | | |
| <p>61. ICS-T3-PSC-61. Obtain approval of the Incident Demobilization Plan from the IC.</p> | I O2 O3 | | |
| <p>62. ICS-T3-PSC-62. Distribute final version of Incident Demobilization Plan.</p> <ul style="list-style-type: none"> • Provide copies to command and general staff and agency dispatch for comment and approval. • Distribute final copies to command and general staff, appropriate unit leaders, agency representatives, agency dispatch and others who assist in implementation of plan. | I O2 O3 | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

POSITION: PLANNING SECTION CHIEF TYPE 3 (PSC3)

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 63. ICS-T3-PSC-63. Implement demobilization plan. <ul style="list-style-type: none"> • Ensure realistic release priorities. • Address agency, cooperating / assisting agency and incident requirements. • Minimize contract, transportation, and personnel costs. • Ensure incident and agency demobilization safety and travel procedures are followed. | I O2 | | |

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

| TASK | C O D E | EVAL RECORD # | VERIFYING OFFICER: Initial & date upon completion of task |
|--|------------------|---------------------|--|
| 64. ICS-T3-SC-24. Coordinate relief process. <ul style="list-style-type: none"> • Consider transition early in the incident. • Inform assigned resources and command staff. • Awareness of incident complexity (escalation / de-escalation) and impact on Planning Section. • Document follow-up action needed and submit to supervisor. | I O2 O3 | | |

Evaluate the numbered tasks ONLY. DO NOT evaluate bullets; they are provided as examples/additional clarification. Some tasks must be completed more than once.

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

These evaluations may be made on incidents, simulations in classroom, or in daily duties, depending on what the position task book dictates (as per the CODE column for each task). This evaluation should be sufficient for qualification in the position if the individual is adequately prepared. Two blank evaluation forms are provided. If the additional evaluations are needed, a page can be copied from a blank ICS PQS and attached.

Complete These Items at the START of the Evaluation Period:

- Evaluation Record Number: This number in the upper right corner of the evaluation record identifies a particular incident / events / exercises or group of incidents / events / exercises. This number should be placed in the column labeled “EVAL RECORD #” on the PQS for each task performed satisfactorily. This number will enable reviews of the completed PQS to ascertain the qualifications of the different Verifying Officers prior to making the appropriate sign-off on the PQS.
- Trainee Information: Name, ICS position performed on the incident / event / exercise, Unit Name and Address
- Verifying Officer Information: Name, ICS position performed on the incident / event / exercise, Unit Name and Address

Complete These Items at the END of the Evaluation Period:

- Incident / Event / Exercise Information
 - Incident / Event / Exercise Name:
 - Reference Number (if any) for Incident / Event / Exercise:
 - Duration: Include dates during which the trainee was evaluated. This block may indicate a span of time covering several small and similar incidents if the trainee has been evaluated on that basis, e.g., several initial response incidents.
 - Incident Kind: Specify Search and Rescue, Oil Spill, Hazmat, Flood, Simulation / Exercise, Event, Other.
 - Location: Identify geographic area, agency, and state.
 - Management Type: Type 5, Type 4, Type 3, Type 2, Type 1, Area Command
 - Number, Types, and Kinds of Resources assigned to incident: Enter the number of resources and types assigned to the incident pertinent to the trainees PQS.
- Verifying Officer’s Recommendation.
 - Recommendation: Initial one line as appropriate and / or make comments regarding the future needs for the development of this trainee.
 - Signature:
 - Initials: This authenticates recommendations and allows for comparison with initials on the PQS.
 - Verifying Officer’s relevant qualification or agency certification relevant to the trainee position supervised.

Trainee Information

Printed Name:
 Trainee ICS Position on Incident / Event / Exercise:
 Home Unit / Agency:
 Home Unit / Agency Address and Phone Number:

Verifying Officer Information

Printed Name:
 Verifying Officer ICS Position on Incident / Event / Exercise:
 Home Unit / Agency:
 Home Unit / Agency Address and Phone Number:

Incident / Event / Exercise Information

Incident / Event / Exercise Name: _____ Reference (Incident Number): _____
 Duration (Dates during which the trainee was evaluated): _____
 Incident Kind: (Specify Search and Rescue, Oil Spill, Hazmat, Flood, Simulation / Exercise, Event, Other): _____
 Location (Include geographic area, agency, and state): _____
 Management Type (Circle one): Type 5, Type 4, Type 3, Type 2, Type 1, Area Command
 Number, Types, and Kinds of Resources assigned to incident: _____

Verifying Officer's Recommendation

(Initial only one line as appropriate)

- _____ 1) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. The trainee has successfully performed all tasks in the PQS for the position. The trainee is ready for a final qualification board.
- _____ 2) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. However, opportunities were not available for all tasks (or all uncompleted tasks) to be performed and evaluated on this assignment. An additional assignment is needed to complete the evaluation.
- _____ 3) The trainee did not complete certain tasks in the PQS in a satisfactory manner and additional training, guidance, or experience is recommended.
- _____ 4) The individual is severely deficient in the performance of tasks in the PQS for the position and additional training, guidance, or experience is recommended prior to another training assignment.

Record additional remarks / recommendations on an Individual Performance Evaluation (ICS-225), on reverse or by attaching an additional sheet to the evaluation record.

Verifying Officer's Signature: _____ Initials: _____ Date: _____

Verifying Officer's Relevant Qualification (or agency certification): _____

Trainee Information

Printed Name:

Trainee ICS Position on Incident / Event / Exercise:

Home Unit / Agency:

Home Unit / Agency Address and Phone Number:

Verifying Officer Information

Printed Name:

Verifying Officer ICS Position on Incident / Event / Exercise:

Home Unit / Agency:

Home Unit / Agency Address and Phone Number:

Incident / Event / Exercise Information

Incident / Event / Exercise Name:

Reference (Incident Number):

Duration (Enter dates during which the trainee was evaluated):

Incident Kind: (Specify Search and Rescue, Oil Spill, Hazmat, Flood, Simulation / Exercise, Event, Other):

Location (Include geographic area, agency, and state):

Management Type (Circle one): Type 5, Type 4, Type 3, Type 2, Type 1, Area Command

Number, Types, and Kinds of Resources assigned to incident:

Verifying Officer's Recommendation(Initial only one line as appropriate)

_____ 1) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. The trainee has successfully performed all tasks in the PQS for the position. The trainee is ready for a final qualification board.

_____ 2) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. However, opportunities were not available for all tasks (or all uncompleted tasks) to be performed and evaluated on this assignment. An additional assignment is needed to complete the evaluation.

_____ 3) The trainee did not complete certain tasks in the PQS in a satisfactory manner and additional training, guidance, or experience is recommended.

_____ 4) The individual is severely deficient in the performance of tasks in the PQS for the position and additional training, guidance, or experience is recommended prior to another training assignment.

Record additional remarks / recommendations on an Individual Performance Evaluation (ICS-225), on reverse or by attaching an additional sheet to the evaluation record.

Verifying Officer's Signature: _____ Initials: _____ Date: _____

Verifying Officer's Relevant Qualification (or agency certification): _____