



COLORADO

**Division of Homeland Security
& Emergency Management**

Department of Public Safety

EMERGENCY OPERATIONS CENTER Critical Performance Task Book

EOC Planning Section Chief

January 2016

Task Book Assigned To:

Trainee's Name: _____

Date Task Book Initiated: _____

EOC Critical Performance Task Book

Organization: _____

Position Title: EOC Planning Section Chief

Name of Candidate: _____

Agency Name: _____

Address: _____

Phone: _____ Cell Phone: _____ Email: _____

Evaluator: _____ Signature: _____

Agency Name: _____

Address: _____

Phone: _____ Cell Phone: _____ Email: _____

Certifying Agency Representative: _____

Certifying Agency Representative Signature: _____

Certifying Agency Name: _____

Address: _____

Phone: _____ Cell Phone: _____ Email: _____

CPTB Overview:

- #1: Assume Position Responsibilities
- #2: Common Operating Picture
- #3: EOC Processes and Support Systems
- #4: Leadership / Accountability
- #5: Work Group Supervision
- #6: Operational Requirements
- #7: Meetings, EOC Briefings and Debriefings
- #8: End of Operational Period / Transitions / Demobilization

Mandatory Prerequisites:

- IS-100.B (Intro to ICS), IS-200.B (ICS for Single Resources & Initial Attack Incidents),
- IS-700.A (Intro to NIMS), IS-800.B(National Response Framework),
- WebEOC Training

Desired Prerequisites:

- IS-235.C (Emergency Planning), IS-241.B (Decision-Making & Problem-Solving),
- IS-551 (Devolution Planning), ICS-300 (Intermediate ICS for Expanding Incidents),
- E/L-962 (All-Hazards Planning Section Chief), G-775 (EOC Management & Operations)

Program Direction:

The purpose of this program is to establish a minimum level of knowledge, behavior and performance in Emergency Operations Center (EOC) positions. Many requirements of EOC personnel are heavily anchored in ICS based programs and education. These programs are helpful and valuable in the development of EOC personnel but not adequate to create effective and highly skilled EOC staff members. To create professional EOC staffers that understand the similarities and differences of EOC versus ICS, a complete program focusing on the special requirements of EOC operations is paramount. The program first begins with training and familiarity with agency emergency plans and EOC operations. Once completed, the taskbook concept begins to build the experience based learning to achieve optimal performance in the assigned EOC position.

Research shows that EOC training programs, taskbooks, operations manuals, and essentials of EOC positions is limited. Many EOCs use ICS formats, forms and training standards as their guide and force fit the discipline of ICS into the EOC system. This program delivers training curricula, EOC forms, EOC essentials manual and Taskbook evaluation / certification tools to create an effective EOC facility, MAC group and EOC operating system.

Roles and Responsibilities:

Candidate: The candidate must complete each Critical Performance Task (CPT) identified within the taskbook in order to be certified by the State of Colorado. All prerequisites must be completed before initiating the CPT book. The candidate is responsible for maintaining their taskbook and having all documentation available at the time of evaluation. Venues that can be used for completing the taskbook are training or EOC activation experience.

The local jurisdiction may also choose to utilize these taskbooks to train personnel without seeking certification at the state level. In this case, the taskbooks are formatted to allow for modifications and additions of local tasks and knowledge. Each task is divided into four sections:

- **Knowledge** – In order to perform any task appropriately, an understanding about the steps of completing the task is needed.
- **Behavior** – In addition to describing the task, it is important to understand why the task is important. This area of each task causes the candidate to recognize the task and its implications.
- **Task** – With a good understanding about the relevance of the task and its importance, and the ability to describe the task, each candidate is expected to perform the given task for the position.
- **Action Steps / Standards** – The final part of each task includes checklist items, with an area to add local steps and standards to ensure local systems are understood and utilized.

Agency Management: Responsible for selecting candidates based on the needs of the organization and the ability to perform the functions of the EOC position. Agency Management is also responsible for providing opportunities for evaluation, including working with neighboring EOCs and working on actual incidents.

Evaluator: When seeking State Certification, all tasks within the taskbook must be accomplished. The evaluator is a person who determines if the task is performed or needs improvement and is able to sign off on certain observed tasks. Evaluators may include Agency Heads, EOC Managers, and anyone certified in the position they are evaluating.

The evaluator must evaluate the entire CPT section they begin to ensure consistent evaluation in the section. Other evaluators can be utilized as long as they are certified by the primary evaluator or certifying agency. If a candidate receives a “needs improvement” mark, a prescription must be completed after the evaluation and the task must be reevaluated at another date. The only task that needs to be reevaluated is the specific task receiving the “needs improvement” mark.

Multiple evaluators may sign off on a specific task to show proficiency in a position if several opportunities to observe that task have occurred. Each task must be completed during an EOC exercise or an actual EOC activation. The level of activation for the exercise or the actual event that is required for each task will be at the discretion of the evaluator.

The **Final Evaluator** is responsible for signing the verification statement on the taskbook when all tasks have been completed satisfactorily.

Certifying Agency: The certifying agency may be either the local jurisdiction, if utilizing the taskbooks for local activations only, or the State Certification Board, if utilizing the taskbook to work with mutual aid EOCs or other communities. The certifying agency must sign off on the candidate’s sheet prior to the end of the evaluation period. This establishes that the candidate is in fact part of an EOC system and their activity is supported by the agency.

Prescription Program: The prescription program is designed to provide specific feedback to the candidate. The prescription outlines the task needing improvement and also the evaluator records detailed information about the deficiency. The corrective action is explained in detail and in such a way that the candidate finds it useful. The candidate signs off on the prescription indicating that expectations are completely understood.

Documentation: All documentation is maintained by the certifying agency.

CPT #1: ASSUME POSITION RESPONSIBILITIES	Evaluation #	Evaluator Initials
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1A: SUCCESSFULLY ASSUME THE ROLE OF PLANNING SECTION CHIEF (PSC) IN THE EOC AND INITIATE POSITION ACTIVITIES

1. Check-in according to agency guidelines
<u>Knowledge</u> - Describes the check-in procedures for the EOC.
<u>Behavior</u> - Recognizes the responsibility of the planning section to ensure check-in procedures are carried out properly.
<u>Task</u> - Demonstrates the ability to follow all check-in procedures and ensure that others within the EOC carry out the same.
Action Steps / Standards:

Evaluation #	Initials

2. Obtain and assemble all supplies, tools and technology needed to effectively perform the tasks of the PSC
<u>Knowledge</u> - Describes the various tools needed to perform the functions of a PSC
<u>Behavior</u> - Recognizes when to request or implement various tools.
<u>Task</u> - Arrives properly equipped to the EOC within acceptable time limits and creates a workspace involving all necessary tools to function in the EOC.
<ul style="list-style-type: none"> ▶ References appropriate for the incident / event type and agencies involved ▶ Pertinent Field Operations Guides ▶ Position Manuals for the Section ▶ EOC Policies and Procedures, EOC Operations Manual ▶ ICP and EOC contact information (as available) ▶ ICS and EOC Forms, Agency Specific Forms ▶ Office Supplies needed to complete the job functions
Action Steps / Standards:

Evaluation #	Initials

3. Establish and maintain EOC Operational Rhythm
<u>Knowledge</u> - Shows awareness of the EOC Operational Rhythm and describes each phase.
<u>Behavior</u> - Recognizes the various phases of the EOC operations and the importance of each to the outcome of the incident / event.
<u>Task</u> - Publishes and posts the EOC operations schedule at appropriate locations.
Action Steps / Standards:
<ul style="list-style-type: none"> ▶ Distribute cycle to EOC personnel ▶ Facilitate meetings and briefings during the operational cycle

Evaluation #	Initials

1B: PLANNING CONTACT INFORMATION

4. Obtain any EOC contact lists available prior to your arrival and develop updated contact lists as needed to support incident / event operations

Knowledge - Describes the reasons for and information contained in contact lists for the EOC.

Behavior - Recognizes the time necessary and the people who can assist in gathering contact information needed for the Planning Section.

Task - Develops a fully updated contact list from previous lists and current staffing as needed to support incident / event operations in the Planning Section.

Action Steps / Standards:

Evaluation #	Initials

5. Field Planning contact information

Knowledge - Describes how to establish a communication link with Field Planning Elements and where the information resides (phone, radio, web, etc).

Behavior - Recognizes the need, prior to the transfer or demobilization, to accumulate the information and prepares to communicate to the incoming Planning Team.

Task - Demonstrates the ability to develop the contact information.

Action Steps / Standards:

Evaluation #	Initials

CPT #2: COMMON OPERATING PICTURE

Evaluation #	Evaluator Initials

2A: GATHER RELEVANT INFORMATION ABOUT THE INCIDENT / EVENT IN ORDER TO PERFORM JOB DUTIES

6. Obtain initial briefing from the EOC Manager

Knowledge - Demonstrates knowledge of key information necessary to share in briefings to create a common operating picture.

Behavior - Recognizes appropriate time and place to gather information from the EOC Manager after activation.

Task - Contacts the EOC Manager using phone, radio, face to face or other means, at the appropriate place and time and gathers information appropriate to the incident / event.

Action Steps / Standards:

- ▶ Obtain current situation and activities related to the incident / event
- ▶ Determine if present plan of action will meet incident / event objectives
- ▶ Identify current and potential problems and concerns

Evaluation #	Initials

7. Gather information necessary from EOC Sections, ESF positions, Incident Command Post (ICP) and other personnel to determine immediate needs and priorities for the Planning Section

Knowledge - Demonstrates knowledge of Incident Command (IC) procedures, and describes the EOC / IC information needed to provide planning support.

Behavior - Recognizes when to gather event information upon activation.

Task - Contacts the ESF positions and Sections using phone, radio, face to face or other means, at the appropriate place and time and gathers information appropriate to the incident / event.

Action Steps / Standards:

- ▶ Collect, evaluate and process resource and situational information to provide the basis of the Incident Support Plan
- ▶ Incident Commander's name and Incident Management Team (IMT) contact information
- ▶ Duration, Size and Type of incident / event
- ▶ Current resource commitments
- ▶ Current situation
- ▶ Weather
- ▶ Policy Group requirements
- ▶ Expected timelines for briefings, planning meetings, and team meetings

Evaluation #	Initials

8. Collect information from outgoing Planning Section Chief responsible for the incident / event support prior to your arrival

Knowledge - Demonstrates knowledge of the Planning Section procedures, and describes the information needed to provide planning support.

Behavior - Recognizes when to gather event information upon activation.

Task - Contacts the outgoing Planning Section Chief using phone, radio, face to face or other means, at the appropriate place and time and gathers information appropriate to the incident / event.

Action Steps / Standards:

- ▶ Obtain status of incident / event and assigned resources
- ▶ Obtain status of existing Planning Section
- ▶ Obtain information on facility locations (ICP, Base and Camp locations, medical facilities, road closures, Staging, Donations, Assistance Centers, etc.

Evaluation #	Initials

2B: DEVELOP SITUATIONAL AWARENESS TOOLS

9. Review Current Situation Reports, 209s, and other situational data sets

Knowledge - Describes the information that is found on various situational reports, such as ICS 209s, Situation Reports, and Incident Action Plans (IAP), and articulates how checking these reports can assist with gaining a common operating picture.

Behavior - After reviewing the reports, recognizes the need for additional action (i.e. requesting assistance or messaging other ESFs for follow up and task postings).

Task - Demonstrates the ability to locate situational reports and documents, view them, and disseminate pertinent data in order to best support incident operations.

Action Steps / Standards:

- ▶ ICS 209 - Incident Status Summary
- ▶ WebEOC - Local, Regional and State Board postings
- ▶ SATool - Situational Awareness Tool
- ▶ EMSsystems - EMS Tracking and Transport Tool / Hospital Status

Evaluation #	Initials

10. Develop or implement situational awareness procedures for the EOC to ensure all members have a common operating picture

Knowledge - Describes how to implement situational awareness procedures within the EOC to support incident / event operations, and describes the necessary elements to obtain good situational awareness.

Behavior - Recognizes the need for standard procedures within the EOC for situational awareness.

Task - Illustrates the process for implementation of situational awareness tools within the EOC. If no systems are in place, demonstrates how such a system can be developed for the needs of the incident / event.

Action Steps / Standards:

Items to Include: Geographic information, topography, location of the incident / event, impacts, communications, technology, mapping, environmental and public health considerations, weather, incident objectives, support opportunities, etc.

Evaluation #	Initials

11. EOC Organizational Structure (EOC 203 / EOC 207)

Knowledge - Demonstrates knowledge of the EOC structure in regard to organizational structure.

Behavior - Recognizes the structure described in the briefing and recognizes how to communicate and flow information in the EOC organization.

Task - Locates the EOC 203 form or the EOC 207 form, either electronically or on paper, and explains its use.

Action Steps / Standards:

Evaluation #	Initials

12. Special considerations
<u>Knowledge</u> - Describes the special considerations that are of concern to the Planning Section in a briefing (resource tracking, situation updates, documentation and demobilization).
<u>Behavior</u> - Recognizes during a briefing the need for any special considerations to be identified.
<u>Task</u> - Demonstrates the ability to record all special considerations in a EOC 214 Unit Log in such a way to cause priority response in dealing with the needs.
Action Steps / Standards:

Evaluation #	Initials

13. Resources Related to the Planning Section
<u>Knowledge</u> - Translates briefing and begins to mentally apply needs of the EOC to existing planning resources. Understands the location, content, and use of the following: EOC Form 209, Situation Reports, Resource Tracking Systems, ICS Forms.
<u>Behavior</u> - During a briefing, recognizes when each planning tool should be accessed and adjusts planning duties and systems to the additional information received during the briefing.
<u>Task</u> - Demonstrates the following abilities: 1) Operates the Local and State WebEOC systems; 2) File completed 213rr; 3) Provides a detailed Situation Report.
Action Steps / Standards:

Evaluation #	Initials

14. Event forecasting information - size, duration, etc.
<u>Knowledge</u> - Describes the process of assessing the need for Resource and Situation Units / functions (or equivalent) based on event forecasting and information.
<u>Behavior</u> - Based on forecasting information, recognizes the planning needs and support requirements and anticipates future needs.
<u>Task</u> - Demonstrates the ability to create and implement a plan from an EOC forecast.
Action Steps / Standards:

Evaluation #	Initials

15. Ensure an EOC Incident Support Summary (EOC Form 209 or similar document) is completed within established timeframes. Make sure priorities and special considerations are specified

Knowledge - Describes the function of the Incident Support Summary and its contents.

Behavior - Recognizes when an Incident Support Summary document should be completed and how to gather the appropriate information for the form.

Task - Gathers information from appropriate EOC members and completes an EOC Form 209 or similar document.

Action Steps / Standards:

- ▶ Review for accuracy and completeness, approve, obtain signatures, and submit to appropriate office
- ▶ Make sure priorities and special considerations are specified

Evaluation #	Initials

2C: GATHER INFORMATION FROM WEBEOC FOR SITUATIONAL AWARENESS

16. Review Local Significant Events Board

Knowledge - Describes the purpose, use and type of information found in the Planning Section Log (EOC 214 or similar document) or the Local Significant Events Board.

Behavior - Recognizes when to review the Planning Log or Local Significant Events Board for information.

Task - Demonstrates the ability to access the Local Significant Events Board and post a message as appropriate.

Action Steps / Standards:

- ▶ Develop a plan for when computers are down or outages occur

Evaluation #	Initials

17. Review State Significant Events Board

Knowledge - Describes the purpose, use and type of information found in the State Significant Events Board.

Behavior - Recognizes when to review the State Significant Events Board for information.

Task - Demonstrates the ability to access the State Significant Events Board and post a message as appropriate.

Action Steps / Standards:

Evaluation #	Initials

18. Review EOC Forms 213rr or other resource ordering and tracking forms
<u>Knowledge</u> - Describes when a resource ordering and tracking procedure would be initiated, how to complete the necessary forms, and the process for authorization.
<u>Behavior</u> - Upon reviewing the forms, incomplete forms are investigated, and resource tracking points are identified.
<u>Task</u> - Demonstrates the ability to access necessary resource ordering and tracking forms, either through WebEOC or local standardized practices.
Action Steps / Standards:

Evaluation #	Initials

CPT #3: EOC PROCESSES AND SUPPORT SYSTEMS	Evaluation #	Evaluator Initials
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3A: ESTABLISH PLANNING ORGANIZATIONAL STRUCTURE

19. Assign planning support positions as needed to assist the Planning Section
<u>Knowledge</u> - Describes the process and tasks that the support positions will fulfill when established and describes when these positions will need to be filled.
<u>Behavior</u> - Upon activation of the Planning Section, recognizes the need for EOC assistance in the Planning Section.
<u>Task</u> - Demonstrates the ability to use resource lists to contact and staff planning support positions during activation.
Action Steps / Standards:
▶ Identify Section's personnel shortages
▶ Replace or order positions in Planning Section, as needed

Evaluation #	Initials

20. Establish and maintain positive interpersonal and interagency working relationships among Planning Section members and other EOC personnel
<u>Knowledge</u> - Describes the benefits of creating positive working relationships with team members, and the disadvantages if these relationships do not exist.
<u>Behavior</u> - Recognizes the need to create and maintain positive working relationships with Planning Team personnel and EOC staff.
<u>Task</u> - Demonstrates the ability to communicate effectively with team members and evaluations show that the candidate works well with others.
▶ Local Agencies
▶ Hosting Unit, Policy Group
▶ Public
▶ EOC Personnel
Action Steps / Standards:

Evaluation #	Initials

21. Understand scope, roles, responsibilities, jurisdiction, and authority of support personnel within the EOC, as well as Technical Specialists that may be assisting the Planning Section

Knowledge - Describes the complex nature of the EOC, Policy Group, ICS and Technical Specialists, with an understanding of how the Planning Section of the EOC fits into the incident / event. Describes what information is needed to determine exactly what the Planning Section is responsible for during an activation.

Behavior - When the event requires the EOC to assume responsibilities outside of the event footprint, the planning section chief recognizes the need for an EOC support staff and initiates the process without hesitation.

Task - Assigns support functions with a clear understanding of roles and responsibilities of each position.

Action Steps / Standards:

Evaluation #	Initials

3B: ESTABLISH PLANNING SECTION PROCEDURES

22. Confirm Incident Command control footprint from EOC Manager to determine event Planning support

Knowledge - Has knowledge of incident command procedures and describes the EOC / IC interface and how the Planning Section provides the critical planning support functions.

Behavior - Recognizes when Planning Section must provide support to ESF positions during an incident / event before a critical need develops. When EOC Manager determines command footprint, the EOC Planning Section Chief responds appropriately by confirming needs with positions now requiring support.

Task - Contacts EOC Manager and determines Planning support responsibilities using phone, radio or face to face.

Action Steps / Standards:

Evaluation #	Initials

23. Communicate with Operations Section regarding Planning support procedures and incident / event support needs

Knowledge - Describes the significance of the Operations Section to all Planning Units and describes the connection between operational objectives and Planning Section responsibilities.

Behavior - Responds appropriately to Operations Section needs and procedures.

Task - Using EOC communications systems, contacts the Operations Section and determines Planning support needs.

Action Steps / Standards:

Evaluation #	Initials

24. Communicate with Finance Section on Planning support procedures

Knowledge - Describes the significance of the Finance Section to all Planning Units and describes the procedure for EOC Form 213rr completion and the Finance Section role.

Behavior - Responds appropriately to Finance Section needs and procedures.

Task - Using EOC communications systems, contacts the Finance Section and determines administrative and Finance support needs.

Action Steps / Standards:

Evaluation #	Initials

25. Communicate with Logistics Section regarding Planning support procedures and resource ordering and tracking for the EOC

Knowledge - Describes the significance of the Logistics Section to all Planning Units and describes the procedure for EOC Form 213rr completion and the Logistics Section role.

Behavior - Responds appropriately to Logistics Section needs and procedures.

Task - Using EOC communications systems, contacts the Logistics Section and determines resource ordering and tracking procedures.

Action Steps / Standards:

Evaluation #	Initials

26. Ensure execution of appropriate administrative requirements of the Planning Section to include documentation, forms, personnel tracking, and performance evaluations

Knowledge - Describes the procedures for how the Planning Section manages documentation, forms, personnel tracking and performance evaluations.

Behavior - Responds appropriately to issues or questions about Planning administrative functions and procedures.

Task - When given various planning forms, completes them appropriately and sends them to the correct Unit for processing or storage.

Action Steps / Standards:

- ▶ ICS 209
- ▶ 213rr - Resource Request Forms
- ▶ Incident Action Plans / Incident Support Plans
- ▶ Personnel tracking reports

Evaluation #	Initials

27. Prioritize Planning support for ESF positions and initiate support activities

Knowledge - Describes how ESF support needs assessment information will be prioritized to ensure that critical needs are addressed first.

Behavior - Given information from a needs assessment, supports the Operations Section in organizing the information into varying levels of importance based on the need.

Task - Given a scope of information related to an ESF needs assessment, works with the Operations Section to create a priority list from greatest to least in criticality.

Action Steps / Standards:

Evaluation #	Initials

28. Develop and/or implement a resource tracking procedure for the EOC and communicate to EOC personnel

Knowledge - Describes the method used in the EOC for resource tracking and describes how the various ESF positions and Sections play a part in this process.

Behavior - Reacts appropriately at each phase of the resource tracking process.

Task - Properly develops or implements EOC resource tracking management systems as outlined in procedures.

Action Steps / Standards:

Evaluation #	Initials

29. If using WebEOC Resource Boards: Ensure that the various resource status boards are updated, accurate and utilized to track resources

Knowledge - Describes the procedures to look up ordered resources, update resource boards, and track them in WebEOC.

Behavior - Recognizes when a resource board is incomplete or when further action is needed.

Task - Given a resource request, operates and manages the resource ordering system within WebEOC.

Action Steps / Standards:

Evaluation #	Initials

CPT #4: LEADERSHIP / ACCOUNTABILITY

Evaluation #

Evaluator
Initials

4A: LEADERSHIP PRINCIPLES

30. Demonstrates proficiency in the position

Knowledge - Describes appropriate policies and procedures of the EOC and Planning Section.

Behavior - Recognizes the needs of staff and incident / event support priorities and executed tasks appropriately.

Task - Takes initiative without supervision or prompting.

Action Steps / Standards:

Evaluation #

Initials

31. Make sound and timely decisions

Knowledge - Describes the size up process required to make sound and timely decisions (what do I want or need to do, what do I have, what do I need, and who needs to know).

Behavior - Recognizes the need to make a decision and apply the above process.

Task - Demonstrates the ability to apply the decision process in an actual EOC environment and have a successful outcome.

Action Steps / Standards:

Evaluation #

Initials

32. Tasks are assigned, understood and accomplished

Knowledge - Describes the general approach to assigning tasks and overseeing work.

1. Clear mission, resources available, time, and clear definition of completion.
2. Explain check in points for direct reports.

Behavior - Recognizes the need to intervene and provide oversight related to task assignments.

Task - Demonstrates the ability to conduct the process described above when warranted.

Action Steps / Standards:

Evaluation #

Initials

33. Keeps subordinates informed

Knowledge - Has knowledge of communications processes and fundamentals.

Behavior - Recognizes when subordinates need information, either to complete a task or for updating purposes.

Task - Conducts feedback processes, briefings and conversations with subordinates effectively.

Action Steps / Standards:

Evaluation #	Initials

34. Assign tasks to subordinates in accordance with their abilities

Knowledge - Describes how to rapidly evaluate the ability level of a subordinate (baseline questioning, qualification review, interviewing peers, recite work steps or process, action/results test).

Behavior - Recognizes the ability of a subordinate before assigning work responsibilities.

Task - Demonstrates the ability to review a subordinates abilities based on a task assignment.

Action Steps / Standards:

Evaluation #	Initials

35. Accepts responsibility for actions

Knowledge - Describes the actions that would be required of a Planning Section Chief if a mistake were made or miscommunication occurred during activation.

Behavior - Recognizes when a problem or mistake occurs and reacts quickly and appropriately to take corrective action.

Task - Demonstrates that when a mistake occurs the ability to resolve the problem or conflict can be done quickly and effectively to move toward accomplishing the overall EOC goals.

Action Steps / Standards:

Evaluation #	Initials

36. Emphasizes teamwork
<u>Knowledge</u> - Describes various methods of building teams and teamwork.
<u>Behavior</u> - Recognizes the advantages of bringing the focus of the group to a team result.
<u>Task</u> - Establishes cohesiveness among assigned personnel and trust through open communications.
Action Steps / Standards:

Evaluation #	Initials

37. Work goals are SMART compliant
"Specific - Measurable - Attainable - Relevant - Timely"
<u>Knowledge</u> - Describe each dimension of SMART.
<u>Behavior</u> - Recognizes when to use SMART during development of work goals and objectives.
<u>Task</u> - Demonstrates the use of SMART when setting goals and objectives.
Action Steps / Standards:

Evaluation #	Initials

38. Ensures adequate rest is provided to all unit personnel
<u>Knowledge</u> - Describes appropriate procedures for ensuring Planning Section personnel employ work/rest guidelines, and employ work habits that will maintain health and stress levels.
<u>Behavior</u> - Recognizes when to take action to ensure the proper health of Planning Section personnel, including rotating in new personnel, breaks, food, etc.
<u>Task</u> - Establishes procedures with staff at the beginning of each operational period to ensure healthy work environment.
Action Steps / Standards:

Evaluation #	Initials

4B: ACCOUNTABILITY OF ASSIGNED PERSONNEL

39. Manage workload to meet operational period objectives

Knowledge - Describes how to manage workloads (planning for additional operational periods, set time benchmarks for each task, etc.).

Behavior - Recognizes when to apply work management practices.

Task - Conducts a workload management meeting when developing work plans and conducts check in at required time or intervals.

Action Steps / Standards:

Evaluation #	Initials

40. Ensure subordinates understand assignments for operational period

Knowledge - Describes the ways to ensure that subordinates understand assignments and tasks (echoing, providing feedback opportunities, removing the pressure if possible, reviewing work plans, and listening to their briefing).

Behavior - Recognizes the need to employ the various actions to ensure work assignments are understood.

Task - Demonstrates the ability to apply the various actions to help subordinates understand work assignments.

Action Steps / Standards:

Evaluation #	Initials

41. Evaluate performance and provide feedback or instruction

Knowledge - Describes the process for determining when performance feedback needs to occur during an operational period or when action should be taken (note tasks not being completed on time, required forms not being completed, lack of information positions in section log, physical appearance of stress, and messages not returned in WebEOC).

Behavior - Recognizes the signs that performance feedback is required during an activation of the EOC.

Task - Demonstrates the ability to recognize, then take action, to communicate performance feedback.

Action Steps / Standards:

Evaluation #	Initials

42. Ensure conflict resolution procedures are clearly stated, understood and agreed upon

Knowledge - Describes the EOC conflict resolution procedures as stated in local EOC procedures (resolve at lowest level possible, move up as needed).

Behavior - Recognizes when a conflict is occurring and takes appropriate actions to resolve and recognize when to move it to a higher authority.

Task - Demonstrates how to deal with a conflict that is occurring within the Section and documents its occurrence.

Action Steps / Standards:

Evaluation #	Initials

CPT #5: WORK GROUP SUPERVISION Evaluation #
 Evaluator Initials

5A: INFLUENCE, GUIDE AND DIRECT PERSONNEL TO ACCOMPLISH OBJECTIVES

43. Establish priorities among ESF 5 and Units within the Section

Knowledge - Describes the process for prioritizing work within the Planning Section (immediate support for IC, immediate support of ESF/Branch needs, immediate EOC support needs, etc).

Behavior - When operating a Planning Section and reviewing priorities, recognizes the appropriate order of assigning work.

Task - Demonstrates the prioritization process within the EOC, while working with ESF 5 and Units within the Planning Section.

Action Steps / Standards:

- ▶ Establish trust through open communication
- ▶ Require commitment
- ▶ Set expectations of accountability
- ▶ Bring focus to the team result

Evaluation #	Initials

44. Identify training needs and provide subordinates opportunities for training

Knowledge - Describes how trainees work within the EOC structure and any procedures associated with this practice.

Behavior - Recognizes the value of having trainees work along side Planning Section personnel to gain experience and knowledge in EOC operations.

Task - Identifies training needs of subordinates and provides documentation for actions that are necessary to advance in Planning Section positions.

Action Steps / Standards:

Evaluation #	Initials

45. Manage information postings and respond in a timely fashion to requests for assistance

Knowledge - Describes how a request for assistance is executed in the EOC and how it comes to the Planning Section.

Behavior - When a request is made of the Planning Section, reviews the information and appropriately determines the action required.

Task - Demonstrates the ability to initiate a Planning Section Log and routes or acts on any requests of the Planning Section.

Action Steps / Standards:

Evaluation #	Initials

5B: ENSURE ALL UNIT FUNCTIONS ARE MANAGED APPROPRIATELY

46. Perform the duties of Resource Unit Leader / function (or equivalent) (tracking personnel and resources ordered through the EOC) according to current policies and procedures

Knowledge - Describes the duties of the Resource Unit Leader / function (or equivalent) at both the EOC and the Incident Command Post, and describes policies and procedures related to the Unit within the EOC.

Behavior - Recognizes the need for adequate resource tracking within the EOC and the challenges associated with this task.

Task - Demonstrates the EOC duties associated with a Resource Unit / function (or equivalent) in order to support the incident / event.

Action Steps / Standards:

- ▶ Maintain status of all assigned resources (EOC Support)
- ▶ Maintain a master list of all resource requests and orders (filled and unfilled)
- ▶ Maintain check-in lists and procedures

Evaluation #	Initials

<p>47. Perform the duties of Situation Unit Leader / function (or equivalent) (situation reports and mapping requirements) according to current policies and procedures</p> <p><u>Knowledge</u> - Describes the duties of the Situation Unit Leader / function (or equivalent) at both the EOC and the Incident Command Post, and describes policies and procedures related to the Unit within the EOC.</p> <p><u>Behavior</u> - Recognizes the need for monitoring the current situation and providing supporting documents and maps to support incident / event operations. Recognizes the challenges associated with the Situation Unit.</p> <p><u>Task</u> - Demonstrates the EOC duties associated with a Situation Unit / function (or equivalent) in order to support the incident / event.</p> <p>Action Steps / Standards:</p> <ul style="list-style-type: none"> ▶ Ensure the collection, processing, and organizing of all incident / event support information ▶ As needed, prepare future projections of incident growth, maps, and intelligence ▶ EOC specific Information to include: Damage Assessments, Rapid Needs Assessments, Field Observations, Re-Entry Considerations, etc.

Evaluation #	Initials

<p>48. Perform the duties of Documentation Unit Leader / function (or equivalent) (maintain EOC files and storage of incident /event related materials) according to current policies and procedures</p> <p><u>Knowledge</u> - Describes the duties of the Documentation Unit Leader / function (or equivalent) at both the EOC and the Incident Command Post, and describes policies and procedures related to the Unit within the EOC.</p> <p><u>Behavior</u> - Recognizes the need for the adequate tracking, processing and storage of EOC documentation and the challenges associated with these tasks.</p> <p><u>Task</u> - Demonstrates the EOC duties associated with a Documentation Unit (or equivalent) in order to support the incident / event.</p> <p>Action Steps / Standards:</p> <ul style="list-style-type: none"> ▶ Maintain accurate and up to date incident / event files ▶ Provide duplication services ▶ Ensure proper storage of incident / event files for legal, analytical, and historic purposes
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Evaluation #	Initials

<p>49. Perform the duties of Demobilization Unit Leader / function (or equivalent) (development of EOC Demobilization Plan) according to current policies and procedures</p> <p><u>Knowledge</u> - Describes the duties of the Demobilization Unit Leader / function (or equivalent) at both the EOC and the Incident Command Post, and describes policies and procedures related to the Unit within the EOC.</p> <p><u>Behavior</u> - Recognizes the need for adequate demobilization procedures and processes and recognizes the challenges associated with this task.</p> <p><u>Task</u> - Demonstrates the EOC duties associated with a Demobilization Unit / functions (or equivalent) in order to support the incident / event.</p> <p>Action Steps / Standards:</p> <ul style="list-style-type: none"> ▶ Develop the Incident Demobilization Plan
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Evaluation #	Initials

CPT #6: OPERATIONAL REQUIREMENTS	Evaluation #	Evaluator Initials
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6A: ENSURE DOCUMENTATION IS COMPLETE

<p>50. Situation Report compiled from ESF positions and Sections</p> <p><u>Knowledge</u> - Describes the use and process for completing the EOC Situation Report form.</p> <p><u>Behavior</u> - Recognizes the need to utilize the form and at the appropriate time.</p> <p><u>Task</u> - Demonstrates the ability to acquire, complete and maintain the form. Demonstrates the ability to utilize information from situation reports to create Incident Support Planning Documents.</p> <p>Action Steps / Standards:</p>
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Evaluation #	Initials

<p>51. Personnel time records are completed</p> <p><u>Knowledge</u> - Describes the use and process for completing the personnel time records.</p> <p><u>Behavior</u> - Recognizes the need to utilize the records and at the appropriate time.</p> <p><u>Task</u> - Demonstrates the ability to acquire, complete and maintain the records.</p> <p>Action Steps / Standards:</p>
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Evaluation #	Initials

52. Resource requests are saved for each operational period
<u>Knowledge</u> - Describes the process and requirements for saving resource request information.
<u>Behavior</u> - Recognizes the need for documentation and at the appropriate time.
<u>Task</u> - Demonstrates the ability to find the correct resource files, forms and charts and then save and print.
Action Steps / Standards:

Evaluation #	Initials

6B: DEVELOP AND IMPLEMENT INCIDENT / EVENT SUPPORT PLAN (ISP)

53. Advise on immediate support capabilities and limitations
<u>Knowledge</u> - Describes how support capabilities and limitations are important to planning activities. Determine what can be supported and communicates limitations to set expectations from ESF positions and their field elements (It also helps to assess this to complete a gap analysis and then develop a plan to increase capacity within the Planning Section).
<u>Behavior</u> - Recognizes when there are planning gaps and then identifies and communicates findings, develops a plan to address issues and monitors the plan for effectiveness.
<u>Task</u> - Demonstrates the ability to assess and address capability and limitations of the Planning Section.
Action Steps / Standards:

Evaluation #	Initials

54. Identify operational period objectives for the EOC to support incident / event operations
<u>Knowledge</u> - Describes the procedure for working with the Operations Section and EOC Manager to develop EOC objectives for each operational period and the method of notifying EOC personnel.
<u>Behavior</u> - Recognizes the need for clear EOC objectives to be outlined for each operational period to support EOC operations.
<u>Task</u> - Demonstrates the process for developing EOC objectives with support from the Operations Section and EOC Manager.
Action Steps / Standards:

Evaluation #	Initials

<p>57. Develop or compile incident / event maps to assist EOC in support operations</p> <p><u>Knowledge</u> - Describes the process for acquiring, developing and/or copying incident and EOC maps in order to best support incident operations.</p> <p><u>Behavior</u> - Recognizes the need for visual representation of incident / event actions and facilities to support incident operations.</p> <p><u>Task</u> - Demonstrates how to create an incident / event support map with all labels, facilities, or other incident related markers.</p> <p>Action Steps / Standards:</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
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Evaluation #	Initials

<p>58. Create a complete Incident / Event Support Plan (ISP)</p> <p><u>Knowledge</u> - Describes the procedure utilized within the EOC for creating an ISP and describes the distribution procedures.</p> <p><u>Behavior</u> - Recognizes the need for accurate and updated information in the ISP.</p> <p><u>Task</u> - Demonstrates how to create an EOC ISP from initial data collection through to distribution to EOC personnel.</p> <p>Action Steps / Standards:</p> <ul style="list-style-type: none"> ▶ Obtain elements from other appropriate Sections within established timeframes ▶ Assemble the elements into an ISP <ul style="list-style-type: none"> - Support Objectives (EOC 202 or similar document) - EOC Organization and staffing (EOC 203 or 207) - ESF responsibilities and priorities - Contact lists and Communications Plans (EOC 205 or Similar) - Maps and other supporting documentation - Weather Reports and other documents that may affect support operations - Reporting procedures ▶ Ensure the ISP meets EOC objectives and is congruent with approved incident / event plans ▶ Develop contingency plans as needed (evacuation, sheltering, debris removal, re-entry, etc) ▶ Obtain the EOC Manager's approval and signature on the ISP ▶ Identify how many copies are needed ▶ Ensure Documentation Unit makes and distributes appropriate copies to key <hr/> <hr/> <hr/> <hr/> <hr/>

Evaluation #	Initials

CPT #7: MEETINGS, EOC BRIEFINGS AND DEBRIEFINGS

Evaluation #

Evaluator
Initials

7A: CONDUCT PLANNING MEETINGS AT APPROPRIATE TIMES WITH APPROPRIATE STAFF

59. Schedule and conduct Planning Section meetings as needed to keep EOC members informed

Knowledge - Describes the process for conducting a Section briefing. The process should include information needed (EOC forms, EOC org chart, Situation Reports, Resource Status), time and location, invitee list, meeting objectives, and process (overview, detail report from subordinates, what is working and not working, recommendations), next operational period review and joint goal and objective setting.

Behavior - When an EOC briefing is scheduled or completed, recognizes the need for additional Section briefing and initiates the process. When operational and organizational problems appear, calls for a briefing to focus the work group.

Task - Demonstrates the ability to acquire all information for the briefing and properly conduct a briefing.

Action Steps / Standards:

- ▶ Inform identified Planning meeting attendees of the time, location, and information expected of them for the meeting
- ▶ Define objectives, agenda, and time expectations for the meeting
- ▶ Agree to and post the meeting agenda at appropriate locations
- ▶ Present accurate, adequate, and current situation and resource status information with accurate maps
- ▶ Technical Specialist input is presented as necessary
- ▶ Arrangements are made for documentation and recording of applicable information
- ▶ Resolve concerns and conflicts
- ▶ Adjust Incident / Event Support Plan accordingly
- ▶ Ensure support of the plan
- ▶ Conduct Planning meeting in 30 minutes or less

Evaluation #	Initials

60. Monitor EOC Support status and develop alternate strategies as needed to meet EOC objectives

Knowledge - Describes the process or procedure for altering existing plans as needed to continue to support incident / event operations.

Behavior - Recognizes the need to be flexible when determining planning objectives and when it is appropriate to change existing plans to support incident / event operations.

Task - Advises EOC staff of significant changes in incident / event status or EOC support status that may affect them, in a timely manner

Action Steps / Standards:

- _____
- _____
- _____
- _____

Evaluation #	Initials

7B: ATTEND AND CONDUCT BRIEFINGS AS NEEDED

61. Attend Agency Administrator, Command and General Staff and/or EOC Staff meetings and briefings as outlined by the EOC Manager

Knowledge - Describes the various meetings and briefings conducted within the EOC and the need for the Planning Section to participate.

Behavior - Recognizes the Planning Section's role in meetings and briefings within the EOC.

Task - Attends and conducts appropriate meetings and briefings.

Action Steps / Standards:

- Obtain a completed analysis of the incident / event; e.g., written Delegations of Authority, copies of most recent ICS Form 209, maps of the incident, and IMT information as necessary
- ▶ Receive EOC Manager's priorities, goals, and objectives for the EOC personnel
- ▶ Obtain initial instructions concerning the tasks expected of the Planning Section
- ▶ Receive expected timeframes for briefings, Planning meetings and team meetings
- Display, describe, and utilize necessary agency policy, legal and fiscal constraints,
- ▶ and political considerations to be used in the Planning meeting to review adequacy of strategic plans and the development of the Incident Support Plan
- ▶ Obtain key contact list with email, phone and fax numbers

Evaluation #	Initials

62. Update on current accomplishments or concerns

Knowledge - Describes how the EOC 202, 203 and 204 Forms are used to update objectives and assignments. Compares the information needed to populate an EOC 202 and EOC 204 form for a briefing.

Behavior - Recognizes the need and appropriate information needed to populate an EOC 202, 203 and 204 form for a briefing.

Task - Demonstrates the ability to complete the EOC 202, 203 and 204 forms. Demonstrates the ability to effectively communicate the update during a briefing. Demonstrates the ability to capture Branch and ESF priorities.

Action Steps / Standards:

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

Evaluation #	Initials

63. Options / Considerations / Recommendations

Knowledge - Describes the correct process for laying out options, and considerations (options should be written down in order of worst to best, do not detail considerations for unrealistic options). Describes how to correctly present recommendations (recommendations are tied to specific objectives, recommendations are SMART related, good explanation for the choice, consideration of unintended consequences, delegation orders, and how the recommendation is going to be communicated).

Behavior - Recognizes the differences between the least likely options from the ones that are realistic options and provides information accordingly. Recognizes the time to move the options and considerations discussion into recommendations.

Task - Demonstrates the ability to effectively communicate options, considerations and recommendations during a briefing.

Action Steps / Standards:

Evaluation #	Initials

64. Ensure Briefing expectations are communicated to all functional areas prior to the briefing

Knowledge - Describes what expectations should be communicated to functional areas related to the Planning Section before a briefing. Describes why it is important to provide background information for each of the action items during a briefing (additional information may be required by superiors or subordinates following the briefing and also for completion of After Action Reports).

Behavior - Recognizes the need for various briefing elements to have background information developed before the briefing begins. Recognizes the required level of information, topics and resources needed to communicate expectations.

Task - Demonstrates the ability to effectively communicate the Planning expectations before and during a briefing.

Action Steps / Standards:

Evaluation #	Initials

65. Next Steps / Operational Period

Knowledge - Describes when the EOC planning briefing needs to occur for the next operational period. Describes the reason for the EOC Planning Team meeting and the EOC briefing.

Behavior - Recognizes the time stamps for each briefing or meeting and prepares all staff for each briefing or meeting.

Task - Demonstrates the ability to effectively participate in the planning team meeting and the EOC briefing.

Action Steps / Standards:

Evaluation #	Initials

CPT #8: END OF OPS PERIOD / TRANSITIONS / DEMOBILIZATION

Evaluation #

Evaluator
 Initials

8A: TRANSFER OF SECTION CHIEF RESPONSIBILITIES TO INCOMING PLANNING SECTION CHIEF

66. Monitor and document progress toward EOC objectives and prepare for transition

Knowledge - Describes EOC process for monitoring progress on EOC objectives and how this information will be passed along to incoming personnel within the Planning Section.

Behavior - Recognizes the need to have clear objectives and the need to communicate the status of objectives to incoming personnel.

Task - Documents the progress of all EOC objectives for incoming personnel and briefs them prior to leaving the position.

Action Steps / Standards:

Evaluation #	Initials

67. Determine time of transfer with replacement

Knowledge - Describes the procedure for adequate transfer of duties with incoming personnel.

Behavior - Recognizes the need for a clear time and place for the transition to occur.

Task - Communicates with incoming personnel when and where the transition of positions will occur and conducts the transition effectively.

Action Steps / Standards:

Evaluation #	Initials

68. Communicate transfer of EOC Planning Section duties to EOC staff

Knowledge - Describes the procedure for communicating change in personnel within the Planning Section to all EOC staff.

Behavior - Recognizes the need to keep all staff informed of staffing changes as soon as they occur within the EOC.

Task - Communicates the transfer of the Planning Section to all EOC staff in a timely manner.

Action Steps / Standards:

Evaluation #	Initials

69. EOC Resource Request and Tracking Status	
<u>Knowledge</u> - Describes how to evaluate the status of resource orders and tracking forms and communicates to incoming Planning Team and ESF positions impacted by the transfer.	
<u>Behavior</u> - Recognizes that there will be resource orders not completed during the process and plans accordingly.	
<u>Task</u> - Demonstrates the ability during a transfer of responsibility or demobilization to acquire, track and communicate to incoming team EOC resource tracking needs.	
Action Steps / Standards:	

Evaluation #	Initials

70. Status of Agreements / Contracts / Documentation	
<u>Knowledge</u> - Describes how to evaluate the status of agreements, contracts and documentation and communicates to incoming Planning Team.	
<u>Behavior</u> - Recognizes that there will be agreements, contracts and documentation not completed during the process and plans accordingly.	
<u>Task</u> - Demonstrates the ability during a transfer of responsibility or demobilization to acquire, track and communicate to incoming team agreements, contracts and documentation needs.	
Action Steps / Standards:	
Ensure management of the following forms:	
▶ Delegations of Authority	
▶ Declarations of Emergency or Disaster	
▶ Governor Executive Orders, Resolutions, Ordinances, etc.	
▶ IGAs / MOUs with assisting organizations and agencies	
▶ Policies and Procedures related to the incident / event	

Evaluation #	Initials

71. Ensure all required reports and narratives are completed to agreed upon standards prior to leaving the EOC	
<u>Knowledge</u> - Describes the various reports and narratives required at the end of shift or incident / event and the information required to complete them.	
<u>Behavior</u> - Recognizes the need for completed reports and forms before leaving an incident / event.	
<u>Task</u> - Demonstrates how to complete an EOC narrative and any supporting documentation. Demonstrates the ability to relay the Operational Rhythm and Meeting Schedule to oncoming staff.	
Action Steps / Standards:	

Evaluation #	Initials

8C: DEMOBILIZATION

74. Oversee the Demobilization Unit in development of the Demobilization Plan

Knowledge - Describes what responsibilities each Section has in the demobilizing process. Describes how to complete reporting requirements and compile data needed for Demobilization Plan.

Behavior - Recognizes the need to check in with Sections when demobilization is determined.

Task - Demonstrates the ability to execute all the above requirements and oversee the demobilization process.

Action Steps / Standards:

- ▶ Determine objectives, priorities and constraints on demobilization
- ▶ Review resource records to determine scope of demobilization effort: resource tracking systems, check-in forms, master personnel lists
- ▶ Determine coordination procedures with cooperating / assisting agencies and organizations to ensure tasks are accomplished according to demobilization schedule
- ▶ Determine Finance/Admin Section and other EOC check-out stops
- ▶ Determine debriefing requirements
- ▶ Establish communications links with EOC-managed organizations and facilities
- ▶ Prepare the Demobilization Plan, obtain approval, and distribute
- ▶ Collect information on established long-term recovery Planning Elements and Task Forces that will remain in effect after the EOC demobilizes
- ▶ Complete all EOC documents and file to the Documentation Unit Leader / function (or equivalent) for inclusion in the final EOC package

Evaluation #	Initials

75. Consider demobilization early enough during EOC operations so that an adequate Demobilization Plan is in place prior to the actual need to release resources

Knowledge - Describes the various factors that go into demobilization of resources from the EOC and develops a plan for the Demobilization Unit.

Behavior - Recognizes the need to have a plan in place for creating a Demobilization Plan early in the incident / event.

Task - Demonstrates the actions needed to begin the demobilization process.

Action Steps / Standards:

- ▶ Ensure Demobilization Plan is complete and signed
- ▶ Develop in coordination with other EOC Sections
- ▶ Request all Sections submit names or lists of surplus personnel and resources to the Demobilization Unit 24 hours in advance of them becoming surplus
- ▶ Coordinate with Section Chiefs to complete the demob process
- ▶ Schedule surplus resources and personnel for proper demobilization
- ▶ Cancel incoming resources or assistance if no longer needed

Evaluation #	Initials

76. Brief Planning Section staff on demobilization responsibilities	
<u>Knowledge</u> - Describes the process to brief Planning Section staff on demobilization process and follow briefing process outlined in document.	
<u>Behavior</u> - Recognizes the need to brief Planning Section staff once demobilization process has been determined.	
<u>Task</u> - Demonstrates the ability to conduct a demobilization briefing with Planning Section staff.	
Action Steps / Standards:	

Evaluation #	Initials

77. Begin demobilization process when indicated by EOC Manager	
<u>Knowledge</u> - Describes how official notifications will occur to initiate the demobilization process (verbal, significant events posting, briefings, messaging).	
<u>Behavior</u> - Recognizes the communication to initiate the demobilization process.	
<u>Task</u> - Demonstrates the ability to initiate the demobilization process once ordered.	
Action Steps / Standards:	

Evaluation #	Initials

78. Provide input to the After Action Report after the incident / event	
<u>Knowledge</u> - Describes the process for completing an After Action Review, how to complete a written After Action Report from this information, and how to implement an Improvement Plan post event.	
<u>Behavior</u> - When the event is demobilizing, recognizes the need to schedule an After Action Review and initiate an Improvement Plan.	
<u>Task</u> - Demonstrates the ability to find and collect information from the event, and demonstrates the ability to complete Planning information for the After Action Report.	
Action Steps / Standards:	

Evaluation #	Initials

Evaluation Record

EOC Position: Planning Section Chief **Candidate Name:** _____

#1	Evaluator's name: Incident/Event Name:		
Evaluator's Home Unit Name, address and phone number:			
Name and Location of Incident/Event:	Incident Type:	Number of EOC Personnel / Level of EOC Activation:	Duration (inclusive dates worked):
			to:

The tasks initialed and dated by me have been performed under my supervision in a satisfactory manner by the above named candidate. I recommend the following for further development of this

- _____ The candidate has successfully performed all tasks for the position and should be considered for certification.
- _____ The candidate was not able to complete certain tasks (comments below) or additional guidance is required.
- _____ Not all tasks were evaluated on this incident/event and an additional assignment is needed to complete the evaluation.
- _____ The candidate is severely deficient in the performance of tasks for the position and needs further training (both required and knowledge and skills needed) prior to additional assignment(s) as a candidate.

Date of Evaluation: _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Evaluator: _____ **Signature:** _____

Phone: _____ **Cell Phone:** _____ **Email:** _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Evaluation Record

EOC Position: Planning Section Chief **Candidate Name:** _____

#2	Evaluator's name: Incident/Event Name:		
Evaluator's Home Unit Name, address and phone number:			
Name and Location of Incident/Event:	Incident Type:	Number of EOC Personnel / Level of EOC Activation:	Duration (inclusive dates worked):
			to:

The tasks initialed and dated by me have been performed under my supervision in a satisfactory manner by the above named candidate. I recommend the following for further development of this

- _____ The candidate has successfully performed all tasks for the position and should be considered for certification.
- _____ The candidate was not able to complete certain tasks (comments below) or additional guidance is required.
- _____ Not all tasks were evaluated on this incident/event and an additional assignment is needed to complete the evaluation.
- _____ The candidate is severely deficient in the performance of tasks for the position and needs further training (both required and knowledge and skills needed) prior to additional assignment(s) as a candidate.

Date of Evaluation: _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Evaluator: _____ **Signature:** _____

Phone: _____ **Cell Phone:** _____ **Email:** _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Evaluation Record

EOC Position: Planning Section Chief **Candidate Name:** _____

#3	Evaluator's name: Incident/Event Name:		
Evaluator's Home Unit Name, address and phone number:			
Name and Location of Incident/Event:	Incident Type:	Number of EOC Personnel / Level of EOC Activation:	Duration (inclusive dates worked):
			to:

The tasks initialed and dated by me have been performed under my supervision in a satisfactory manner by the above named candidate. I recommend the following for further development of this

- _____ The candidate has successfully performed all tasks for the position and should be considered for certification.
- _____ The candidate was not able to complete certain tasks (comments below) or additional guidance is required.
- _____ Not all tasks were evaluated on this incident/event and an additional assignment is needed to complete the evaluation.
- _____ The candidate is severely deficient in the performance of tasks for the position and needs further training (both required and knowledge and skills needed) prior to additional assignment(s) as a candidate.

Date of Evaluation: _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Evaluator: _____ **Signature:** _____

Phone: _____ **Cell Phone:** _____ **Email:** _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Evaluation Record

EOC Position: Planning Section Chief **Candidate Name:** _____

#4	Evaluator's name: Incident/Event Name:		
Evaluator's Home Unit Name, address and phone number:			
Name and Location of Incident/Event:	Incident Type:	Number of EOC Personnel / Level of EOC Activation:	Duration (inclusive dates worked):
			to:

The tasks initialed and dated by me have been performed under my supervision in a satisfactory manner by the above named candidate. I recommend the following for further development of this

- _____ The candidate has successfully performed all tasks for the position and should be considered for certification.
- _____ The candidate was not able to complete certain tasks (comments below) or additional guidance is required.
- _____ Not all tasks were evaluated on this incident/event and an additional assignment is needed to complete the evaluation.
- _____ The candidate is severely deficient in the performance of tasks for the position and needs further training (both required and knowledge and skills needed) prior to additional assignment(s) as a candidate.

Date of Evaluation: _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Evaluator: _____ **Signature:** _____

Phone: _____ **Cell Phone:** _____ **Email:** _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

Recommendations

CPT# _____ CPT Title: _____

CPT Sub Category # _____ Description: _____

Observed Action: _____

Desired Outcome: _____

Corrective Action Steps: _____

