

COMMON OBJECTIVES

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

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

Topics covered in this pre-course work include:

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

Planning Section Overview

OBJECTIVES:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

MOBILIZATION

OBJECTIVES:

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

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



Are you really ready?

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

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

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

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

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



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

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

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

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



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

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

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

National Interagency Mobilization Guide
Fireline Handbook (NWCG Handbook 3)

ICS forms

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

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

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

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

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

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

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

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

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



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

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

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

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

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

INCIDENT ACTIVITIES

OBJECTIVES

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

INITIAL BRIEFING



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

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

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

Now that's completed; what's next?

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

General Information

- Assess current situation.

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

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

Unit Specific Information

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

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

PROVIDING UNIT LEADERSHIP AND MANAGEMENT

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



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

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

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

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



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

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

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



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

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

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

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

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

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

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

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

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



Gee. All this is making me tired and hungry.

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

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

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

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

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

DOCUMENTATION

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

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

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



DEMOBILIZATION

OBJECTIVES:

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



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

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

My plans for demobilizing my unit?



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

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

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



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

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

UNIT LEVEL'S RESPONSIBILITIES FOR IMPLEMENTING THE DEMOBILIZATION PROCESS.

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



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

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

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

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

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

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

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

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

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

COMPILE INFO TO IDENTIFY PRE-RELEASE PRIORITIES.

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

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

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

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

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

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

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

FURTHER INFORMATION

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

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

Thanks. I'll take a look.