

Position Task Books Exercise 1 Overview—Unit 1

Purpose

The purpose of this exercise is to provide participants with an opportunity to identify functions essential to the Resources Unit Leader (RESL) that they perform regularly at their daily jobs or have performed on previous incidents.

Objectives

Students will:

- Identify common functions performed on a regular basis as part of their job and match those to duties and responsibilities of a RESL.
- Be able to identify basic requirements of the RESL position as identified in the draft Position Task Book (PTB).

Exercise Structure

This exercise is scheduled to last approximately 30 minutes, including small group discussion and presentation of group findings. Participants will review the RESL PTB and identify their current job or previous incident responsibilities that are similar to those identified in the PTB. This analysis should stay at the **Competencies** level; students should not start comparing their job with the Behaviors and Tasks listed in the PTB. Each group will present their findings to the rest of the group.

Rules, Roles, and Responsibilities

Following are the specific activities / instructions for your participation in the exercise:

1. Within your work group, select a group spokesperson.
2. Review the draft PTB. Looking at the **Competencies** (do not delve into Behaviors or Tasks), identify functions and duties that you perform during your regular job or on previous incidents and that are listed in the draft PTB.
3. Write the common functions, duties, and responsibilities on an easel pad.
4. Present your list to the rest of the class.

Instructors moderate discussions, answer questions and provide additional information as required.

Exercise 1 Schedule

Exercise Introduction and Overview	2 minutes	Classroom
Discussion / Documentation	15 minutes	Small Groups
Debrief / Review	15 minutes	Classroom

This page is intentionally left blank.

POSITION TASK BOOK FOR THE POSITION OF

ALL-HAZARD RESOURCES UNIT LEADER

Version: June 15, 2009

POSITION TASK BOOK ASSIGNED TO:
INDIVIDUAL'S NAME, DUTY STATION, AND PHONE NUMBER
POSITION TASK BOOK INITIATED BY:
OFFICIAL'S NAME, TITLE, DUTY STATION, AND PHONE NUMBER
LOCATION AND DATE THAT POSITION TASK BOOK WAS INITIATED

EVALUATOR

DO NOT COMPLETE THIS UNLESS YOU ARE RECOMMENDING THE TRAINEE FOR CERTIFICATION

VERIFICATION/CERTIFICATION OF COMPLETED POSITION TASK BOOK FOR THE POSITION OF

FINAL EVALUATOR'S VERIFICATION

I verify that all tasks have been performed and are documented with appropriate initials.

I also verify that _____

has performed as a trainee and should therefore be considered for certification in this position.

FINAL EVALUATOR'S SIGNATURE AND DATE

EVALUATOR'S PRINTED NAME, TITLE, DUTY STATION, AND PHONE NUMBER

AGENCY HEAD RECOMMENDATION FOR CERTIFICATION

I certify that _____ has met all requirements for qualification in this position and I recommend that they be certified for the position.

OFFICIAL'S SIGNATURE AND DATE

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

HISTORICAL RECOGNITION

Historical recognition is a process that provides a means by which incident management personnel who have either:

- Documentation of previous ICS training, education, and experience in an ICS position(s); or
- Documentation of previous extensive on-the-job incident response experience,

may receive credit for that previous experience, training, or qualification(s) and be considered as meeting the minimum requirements of this guide in the categories of:

- Education;
- Training; and
- Experience,

for an ICS position(s) until they have successfully completed the actual minimum requirements for that position. Historical Recognition does not apply to the categories of Physical/Medical Fitness, Currency, or certification. The minimum requirements within those categories must be met regardless of any historical recognition process.

HISTORICAL RECOGNITION PROCESS

If an Authority Having Jurisdiction (AHJ) does not form a Qualifications Committee to assist with the management of the overall qualifications process, AHJ's should give strong consideration to at least forming a committee for the purposes of reviewing and processing applications for Historical Recognition. Because of the time commitment involved and the potential for perceptions of favoritism and unequal treatment during the process, other ICS qualifications processes currently used by Federal and State agencies that included a historical recognition provision used review committees to accomplish that process.

The AHJ should develop a process to provide for the following:

- Developing a method to provide for historical recognition when there is sufficient documentation available to substantiate the experience;
- Developing a standardized method for any individual to submit documentation of the experience and training for review by the AHJ or the appropriate review committee established by the AHJ;
- Developing a method to determine if the previous experience or training is appropriate for the position, keeping in mind the required criteria for the position and the competencies necessary for safe and successful performance;
- Providing for Historical Recognition only when the individual has most recently performed the position within the last five years;
- Requiring the individual meet all minimum requirements in this guide for a position if the individual seeks an ICS position other than the position they were historically recognized for;
- Encouraging all individuals who are historically recognized into a position to complete the minimum requirements for the positions within five years of being historically recognized.

INCIDENT MANAGEMENT SYSTEM POSITION TASK BOOK

Position Task Books (PTB) were developed for designated positions as described under the National Interagency Incident Management System (NIIMS) and have been incorporated into the National Incident Management System (NIMS). The position task book is used by the authority having jurisdiction to certify that the person to whom the task book belongs meets the standards recommended by the National (NIMS) Integration Center (NIC).

Each PTB lists the performance requirements (tasks) for the specific position in a format that allows a trainee to be evaluated against written guidelines. Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation that the trainee be certified in that position. Evaluation and confirmation of the individual's performance of all the tasks may involve more than one evaluator and can occur on incidents, in classroom simulation, and in other work situations. Designated PTBs require position performance during which the majority of required tasks are demonstrated on a single incident. It is important that performance be critically evaluated and accurately recorded by each evaluator. All tasks must be evaluated. All bullet statements within a task that require an action (contain an action verb) must be demonstrated before that task can be signed off.

A brief list of responsibilities also appears below.

RESPONSIBILITIES:

1. The **Agency Management** is responsible for:
 - Selecting trainees based on the needs of their organization or area Incident Management Teams.
 - Providing opportunities for evaluation and/or making the trainee available for evaluation.
2. The **Individual** is responsible for:
 - Reviewing and understanding instructions in the PTB.
 - Identifying desired objectives/goals.
 - Providing background information to an evaluator.
 - Satisfactorily demonstrating completion of all tasks for an assigned position within three years.
 - Assuring the evaluation record is complete.
 - Notifying the local agency head when the PTB is completed, and obtaining their signature recommending certification.
 - Keeping the original PTB in personal records.
3. The **Evaluator** is responsible for:
 - Being qualified and proficient in the position being evaluated.
 - Meeting with the trainee and determining past experience, current qualifications, and desired objectives/goals.

- Reviewing tasks with the trainee.
 - Explaining to the trainee the evaluation procedures that will be utilized and which objectives may be attained.
 - Identifying tasks to be performed during the evaluation period.
 - Accurately evaluating and recording demonstrated performance of tasks. Dating and initialing completion of the task shall document satisfactory performance. Unsatisfactory performance shall be documented in the Evaluation Record.
 - Completing the Evaluation Record found at the end of each PTB.
4. The **Final Evaluator** is responsible for signing the verification statement inside the front cover of the PTB when all tasks have been initialed.
5. The **Agency Head** or designee is responsible for:
- Issuing the PTB to document task performance.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Tracking progress of the trainee.
 - Identifying incident evaluation opportunities.
 - Identifying and assigning an evaluator that can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance.
 - Documenting the assignment.
 - Conducting progress reviews.
 - Conducting a closeout interview with the trainee and evaluator and assuring that documentation is proper and complete.

Competency 1: Assume position responsibilities.

Description: Successfully assume role of Unit Leader within the Planning Section and initiate position activities at the appropriate time according to the following behaviors.

Behavior 1: Ensure availability, qualifications, and capabilities of resources to complete assignment.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Coordinate with Planning Section Chief and other functional areas to obtain resources to organize work space and keep unit operating. <ul style="list-style-type: none"> • Order materials and supplies using procedures established by the section chief. • Maintain quantities of forms, supplies, and materials at a level to prevent shortage of any basic needed items. • Acquire equipment (e.g., radio, telephones, faxes, computers). • Ensure appropriate personnel to support unit (e.g., night operational period, increase/reduce staffing). • Ensure adequate signage for work locations (e.g. check in/demob/resource.). 	I		

Behavior 2: Gather, update, and apply situational information relevant to the assignment.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Obtain initial briefing and information from Planning Section Chief. <ul style="list-style-type: none"> • Policies and operating procedures (e.g., ordering resources and supplies, work schedule, timelines, and priorities). • Operational work period. • Current unit staffing levels. • General orientation to the Incident Command Post and/or incident base. • Incident briefing, ICS 209, Incident Status Summary and Incident Action Plan (IAP) or other relevant plan, as available • Expectations for attending meetings/briefings. 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)

I = task must be performed on an incident

R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

<ul style="list-style-type: none"> Safety concerns/hazards. 			
2. Establish situation awareness pertinent to unit. <ul style="list-style-type: none"> Organizational contacts (e.g., counterparts, host unit personnel). Supporting documentation (e.g., maps, digital information, ICS 260, Resource Order). 	I		

Behavior 3: Establish effective relationships with relevant personnel.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Establish and maintain positive interpersonal and interagency working relationships.	I		

Behavior 4: Establish organization structure, reporting procedures, and chain of command of assigned resources.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Organize assigned personnel to meet the needs of the unit.	I		

Behavior 5: Understand and comply with ICS concepts and principles.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Coordinate with functional areas within the ICS structure.	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)
 I = task must be performed on an incident
 R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

Competency 2: Lead assigned personnel.

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

Behavior 1: Model leadership values and principles.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Exhibit principles of duty. <ul style="list-style-type: none"> • Be proficient in your job, both technically and as a leader. • Make sound and timely decisions. • Ensure tasks are understood, supervised, and accomplished. • Develop your subordinates for the future. 	I		
2. Exhibit principles of respect. <ul style="list-style-type: none"> • Know your subordinates and look out for their well-being. • Keep your subordinates informed. • Build the team. • Employ your subordinates in accordance with their capabilities. 	I		
3. Exhibit principles of integrity. <ul style="list-style-type: none"> • Know yourself and seek improvement. • Seek responsibility and accept responsibility for your actions. • Set the example. 	I		

Behavior 2: Ensure the safety, welfare, and accountability of assigned personnel.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Provide for the safety and welfare of assigned resources. <ul style="list-style-type: none"> • Monitor condition of assigned resources. • Account for assigned resources. • Provide for care of assigned personnel and notify supervisor in event of sickness, injury, or accident. 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)

I = task must be performed on an incident

R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

Behavior 3: Establish work assignments and performance expectations, monitor performance, and provide feedback.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Perform duties of a Status Check-in Recorder. <ul style="list-style-type: none"> • Obtain required work materials, including Check-in Lists (ICS Form 211), Resource Status Cards (ICS Form 219), and status display boards. • Establish communications with the Communication Center and Ground Support Unit. • Post signs so that arriving resources can easily find incident check-in location(s). • Record check-in information on Check-in Lists (ICS Form 211). • Transmit check-in information to Resources Unit on regular prearranged schedule or as needed. • Forward completed Check-in Lists (ICS Form 211) to the Resources Unit. • Receive, record, and maintain resource status information on Resource Status Cards (ICS Form 219) for incident assigned Single Resources, Strike Teams, Task Forces, and Overhead personnel. • Maintain files of Check-in Lists (ICS Form 211). 	I		
2. Complete daily review of staffing requirements and ensure adequate personnel to meet needs.	I		
3. Develop schedule/assignments based on IAP or relevant plan.	I		
4. Ensure subordinates understand assignment for operational period.	I		
5. Continually evaluate performance. <ul style="list-style-type: none"> • Communicate deficiencies immediately and take corrective action. • Provide training opportunities where available. • Complete personnel performance evaluations according to agency guidelines. 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)

I = task must be performed on an incident

R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

Behavior 4: Emphasize teamwork.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Establish cohesiveness among assigned resources. <ul style="list-style-type: none"> • Provide for open communication. • Seek commitment. • Set expectations for accountability. • Focus on the team result. 	I		

Behavior 5: Coordinate interdependent activities.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Coordinate with other units and sections for completion of work assignments. <ul style="list-style-type: none"> • Assist other sections to meet priorities and time frames. • Receive and transmit needed information. 	I		
2. Coordinate with Supply Unit/or expanded dispatch on status of outstanding resource orders.	I		
3. Coordinate with Finance, Logistics, and Operations Sections to verify status of current resources. <ul style="list-style-type: none"> • Identify unassigned resources and take appropriate action. 	I		
4. Interact with Demobilization Unit Leader to provide access to resource status system and other information. <ul style="list-style-type: none"> • Adjust resource availability information to reflect implementation of incident demobilization plan and pending scheduled releases. 	I		
5. Provide information on current status of resources to Situation Unit Leader for completion of ICS 209, Incident Status Summary within established time frames.	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)
 I = task must be performed on an incident
 R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

Competency 3: Communicate effectively.

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

Behavior 1: Ensure relevant information is exchanged during briefings and debriefings.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Brief and keep subordinates informed and updated. <ul style="list-style-type: none"> • Ensure unit leader expectations are communicated and understood. 	I		
2. Attend incident operational briefings and meetings as directed. <ul style="list-style-type: none"> • Record corrections to documents (e.g., IAP, maps). • Provide information as requested. 	I		
3. Participate in functional area briefings and conduct unit After Action Reviews (AARs).	I		
4. Attend planning and strategy meetings as directed. <ul style="list-style-type: none"> • Complete ICS 215, Operational Planning Worksheet with the Operations Section Chief. • Provide resource information as requested. • Record changes to ICS 215, Operational Planning Worksheet. 	I		

Behavior 2: Ensure documentation is complete and disposition is appropriate.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Review and approve subordinate time reports.	I		
2. Submit completed original documents as appropriate (e.g. each operational period, final package.). <ul style="list-style-type: none"> • Original IAP. • Corrected copy of IAP. • ICS 207, Organization Chart. • ICS 215, Operational Planning Worksheet. 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)

I = task must be performed on an incident

R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

<ul style="list-style-type: none"> • ICS 213, General Message. • ICS 214, Unit Log. 			
3. Compile unit documentation for final incident package.	I		

Behavior 3: Gather, produce and distribute information as required by established guidelines and ensure understanding by recipient.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Prepare information for preplanning/strategy meeting. <ul style="list-style-type: none"> • Display information appropriate for next operational period. 	I		
2. Prepare input to final narrative and transition plan as requested.	I		
3. Respond to requests for information about resources. <ul style="list-style-type: none"> • Process requests for information and create reports using manual and automated database systems (e.g., jet port, other qualifications). • Process emergency requests for information in a timely manner. 	I		
4. Set up and maintain resource status system (e.g., status cards, automated system) to reflect the function, organization, status, and location of resources on the incident. <ul style="list-style-type: none"> • Adjust resource status to reflect changes in status for incident resources. • Check and maintain accuracy of current resource information and document operational changes in a corrected IAP, status card display, or automated system. 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)

I = task must be performed on an incident

R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

Behavior 4: Communicate and ensure understanding of work expectations within the chain of command and across functional areas.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Coordinate across functional areas. <ul style="list-style-type: none"> Provide timely feedback in response to requests. 	I		
2. Establish time frames and protocols for information exchange to complete work assignments. <ul style="list-style-type: none"> IAP inputs (Resources Unit Leader). ICS 209, Incident Status Summary (Situation Unit Leader). Tentative releases (Demobilization Unit Leader). 	I		

Behavior 5: Develop and implement plans and gain concurrence of affected agencies and/or the public.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Develop contingency plans. <ul style="list-style-type: none"> Equipment breakdown. Power outages. Unexpected staffing shortages. 	I		
2. Prepare ICS 204, Division Assignment List, for the next operational period. <ul style="list-style-type: none"> Include assignments, instructions, and additional information contained in ICS 215, Operational Planning Worksheet. Use information from the most recent communications plan. Submit ICS 204, Division Assignment List as part of the IAP. 	I		
3. Prepare ICS 203, Organization Assignment List and/or ICS 207, Organization Chart. <ul style="list-style-type: none"> Reflect results of most recent planning meeting and updated resource status system. Submit ICS 203, Organization Assignment List as part of the IAP. 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)

I = task must be performed on an incident

R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

<ul style="list-style-type: none">• Post ICS 207, Organization Chart in highly visible locations.			
---	--	--	--

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)
I = task must be performed on an incident
R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

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

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

Behavior 1: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Evaluate available information and make recommendations to support the incident. <ul style="list-style-type: none"> • Workload priorities. • Staff assignments. • Information requests. 	I		
2. Monitor restrictions/work requirements for each resource to maximize safe and efficient assignments and demobilization. <ul style="list-style-type: none"> • Number of days worked in succession. • Rest and recuperation requirements. • Number of days on previous assignment. • Contract limitations. • Restrictions on type of assignment. • Assignment to remote locations. • Assignment to special work periods. • Incident qualifications. 	I		

Behavior 2: Make appropriate decisions based on analysis of gathered information.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Determine and monitor current status of unit activities. <ul style="list-style-type: none"> • Changing needs. • Staffing levels. 	I		
2. Make independent decisions based on available information. <ul style="list-style-type: none"> • Decisions result in incident efficiency. 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)

I = task must be performed on an incident

R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

Behavior 3: Utilize information to produce outputs.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Compile master IAP. <ul style="list-style-type: none"> Submit to Planning Section Chief and/or Incident Commander for approval and signature. 	I		

Behavior 4: Take appropriate action based on assessed risks.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Manage Check-in functions. <ul style="list-style-type: none"> Establish data collection standards for check-in (e.g., data format, calculation of data). Establish type of information to gather (e.g., travel status information, contract work limitation, incident qualifications, phone numbers). Collect and process check-in information (e.g., ICS 211, Check-In List; ICS 219, Resource Status Card; data base) following established timeline. Evaluate check-in information and ensure established standards are being met. Determine logistical needs (e.g., electricity, shade, transportation, communication). 	I		
2. Place resource orders upon direction from the Planning Section Chief and Operations Section Chief to reconcile resource needs. <ul style="list-style-type: none"> Base requests on resource needs identified on ICS 215, Operational Planning Worksheet during planning meeting. 	I		
3. Assign specific resources to fill needs identified on ICS 215, Operational Planning Worksheet at the planning meeting. <ul style="list-style-type: none"> Use work requirement/restriction information to guide assignments made to each resource. Consider safe operations when selecting resources. 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)

I = task must be performed on an incident

R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

<ul style="list-style-type: none"> • Update resource status system to reflect approved assignments. • Coordinate resource assignments with Operations Section Chief. 			
--	--	--	--

Behavior 5: Follow established procedures and/or safety procedures relevant to given assignment.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Ensure established guidelines are followed. <ul style="list-style-type: none"> • Work/rest. • Personal protective equipment (PPE) when required for field assignments. • Communication (e.g., radio, cell phone). 	I		

Behavior 6: Transfer position duties while ensuring continuity of authority and knowledge and taking into account the increasing or decreasing incident complexity.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Coordinate an efficient transfer of position duties when mobilizing/demobilizing (e.g., incoming Incident Management Team (IMT), host agency.) <ul style="list-style-type: none"> • Determine time of transfer with replacement. • Inform subordinate staff and IC. • Document follow-up action needed and submit to supervisor. 	I		

Behavior 7: Plan for demobilization and ensure demobilization procedures are followed.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Anticipate demobilization of resources. <ul style="list-style-type: none"> • Identify excess resources. • Prepare schedule for demobilization. 	I		
2. Ensure demobilization of resources. <ul style="list-style-type: none"> • Brief subordinate staff on demobilization 	I		

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)
 I = task must be performed on an incident
 R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

procedures and responsibilities. • Ensure incident and agency demobilization procedures are followed.			
--	--	--	--

Code: O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)
I = task must be performed on an incident
R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

There are four separate blocks allowing evaluations to be made. These evaluations may be made on incidents, simulations in classroom, or in daily duties, depending on what the position task book indicates. This should be sufficient for qualification in the position if the individual is adequately prepared. If additional blocks are needed, a page can be copied from a blank task book and attached.

COMPLETE THESE ITEMS AT THE START OF THE EVALUATION PERIOD:

Evaluator's name, incident/office title, and agency: List the name of the Evaluator, his/her incident position or office title, and agency.

Evaluator's home unit address and phone: Self-explanatory

#: The number next to the evaluator's name in the upper left corner of the evaluation record identifies a particular incident or group of incidents. This number should be placed in the column labeled "Evaluation Record #" on the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to ascertain the qualifications of the different evaluators prior to making the appropriate sign-off on the PTB.

Location of Incident/Simulation: Identify the location where the tasks were performed by agency and office.

Incident Kind: Enter kind of incident; e.g., hazmat, wildland fire, structural fire, search and rescue, flood, tornado, etc.

COMPLETE THESE ITEMS AT THE END OF THE EVALUATION PERIOD:

Number and Type of Resources: Enter the number of resources and types assigned to the incident pertinent to the Trainee's task book position.

Duration: Enter inclusive dates during which the Trainee was evaluated. This block may indicate a span of time covering several small and similar incidents if the Trainee has been evaluated on that basis; e.g., several initial attack wildfires in similar fuel types.

Recommendation: Check as appropriate and/or make comments regarding the future needs for development of this Trainee.

Date: List the date the record is being completed.

Evaluator's initials: Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.

Evaluator's relevant certification: List your certification relevant to the Trainee position you supervised.

EVALUATION RECORD

TRAINEE NAME		TRAINEE POSITION		
#1	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation (agency & area)	Incident Kind (hazmat, tornado, flood, structural fire, wildfire, search & rescue, etc.)	Number & Type of Resources Pertinent to Trainee's Position	Duration (inclusive dates in trainee status)	
			to	
The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above named Trainee. I recommend the following for further development of this Trainee.				
<input type="checkbox"/> The individual has successfully performed all tasks for the position and should be considered for certification.				
<input type="checkbox"/> The individual was not able to complete certain tasks (comments below) or additional guidance is required.				
<input type="checkbox"/> Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.				
<input type="checkbox"/> The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.				
Recommendations: _____ _____				
Date: _____ Evaluator's initials: _____				
Evaluator's relevant agency certification or rating: _____				

EVALUATION RECORD (CONTINUATION SHEET)

#2	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation (agency & area)	Incident Kind (hazmat, tornado, flood, structural fire, wildfire, search & rescue, etc.)	Number & Type of Resources Pertinent to Trainee's Position	Duration (inclusive dates in trainee status)	
			to	
The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above named Trainee. I recommend the following for further development of this Trainee. _____ The individual has successfully performed all tasks for the position and should be considered for certification. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee. Recommendations: _____ _____ Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

EVALUATION RECORD (CONTINUATION SHEET)

#3	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation (agency & area)	Incident Kind (hazmat, tornado, flood, structural fire, wildfire, search & rescue, etc.)	Number & Type of Resources Pertinent to Trainee's Position	Duration (inclusive dates in trainee status)	
			to	
The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above named Trainee. I recommend the following for further development of this Trainee. _____ The individual has successfully performed all tasks for the position and should be considered for certification. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee. Recommendations: _____ _____ _____ Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

EVALUATION RECORD (CONTINUATION SHEET)

#4	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or situation (agency & area)	Incident Kind (hazmat, tornado, flood, structural fire, wildfire, search & rescue, etc.)	Number & Type of Resources Pertinent to Trainee's Position	Duration (inclusive dates in trainee status)	
			to	
The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above named Trainee. I recommend the following for further development of this Trainee. _____ The individual has successfully performed all tasks for the position and should be considered for certification. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee. Recommendations: _____ _____ Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

This page is intentionally left blank.

Key points about information logged on the ICS Form 214.

The purpose of the 214 is to provide documentation of 'significant' activities you have worked on when on duty. As with all documentation about an incident, it serves as a record of actions and activities that are part of the official documentation and timeline of the incident. There is therefore a dual use for this documentation. First as your personal reminder list / memory jog; and second as proof of action taken in fulfilling your official duties.

1. **0730** Noted the briefing and my announcement of contact info. This is my personal record of having provided this critical information. Benefits of noting this are that it is my proof that I provided the info in case someone claims to have not received it.
2. **0800** Assigned Ed Gross to track down AREP from Tri-County Ambulance Service....
 - a. This serves as a reminder to me to follow up later if I haven't heard back from Ed and/or TriCounty Ambulance.
 - b. Also a documentation that we have tried to establish contact and have not yet done so.
3. **0930** Baker County Commissioner called...
 - a. Noted who I informed and the assignment of responsibilities
4. **0945** Ed contacted ambulance AREP
 - a. Noted completion of task assignment #2 above.
 - b. Noted cause of problem for later AAR follow-up and possible system change on future incidents.
5. **1200** SOFR told me...
 - a. Any safety issue is potentially critical. Noted my involvement in this issue.
 - b. Potential follow-up with both SO and AREP later on
6. **1300** Parker County AREP wants fire engines back
 - a. Very significant issue
 - b. Documented that I informed the two critical C&G staff about this development.
 - c. May need to follow-up later.