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# Unit 2: Overview of the Planning Section and the Planning Process

STUDENT GUIDE

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**Objectives**

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

- Define the purpose of the Planning Section
- Describe the Planning Section's positions and their functions
- Describe the planning process and the Planning P
- Describe the Resources Unit Leader's input in the planning process

**Methodology**

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This unit uses lecture and discussion.

Knowledge of unit content will be evaluated through the administration of the Final Exam upon completion of the course.

This unit provides the foundation of the Planning Section and the planning cycle that will be expanded upon throughout the rest of the course. Upon completion of this unit, through lecture, discussion, and interactive activities, the student will be able to describe the organization and functions of the Planning Section.

**Time Plan**

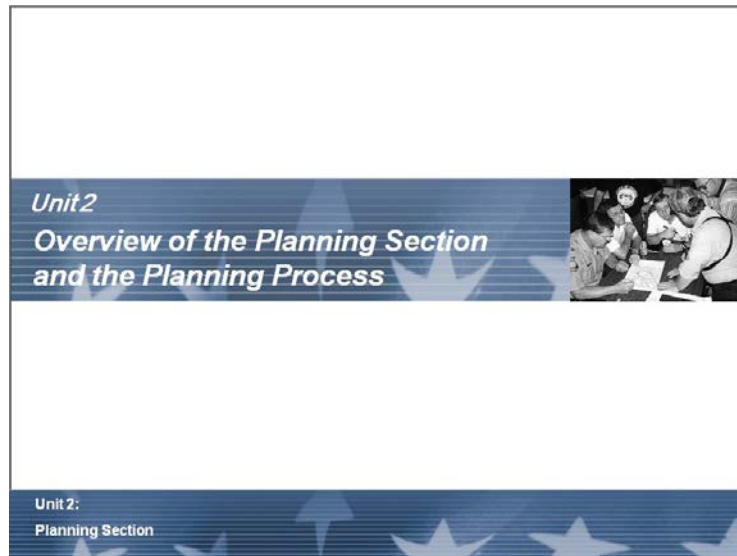
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A suggested time plan for this unit is shown below. More or less time may be required based on the experience level of the group.

| Topic             | Time              |
|-------------------|-------------------|
| Lesson            | 1 hour 30 minutes |
| <b>Total Time</b> | 1 hour 30 minutes |

**Topic**Overview of the Planning Section and the Planning Process

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**Key Points**

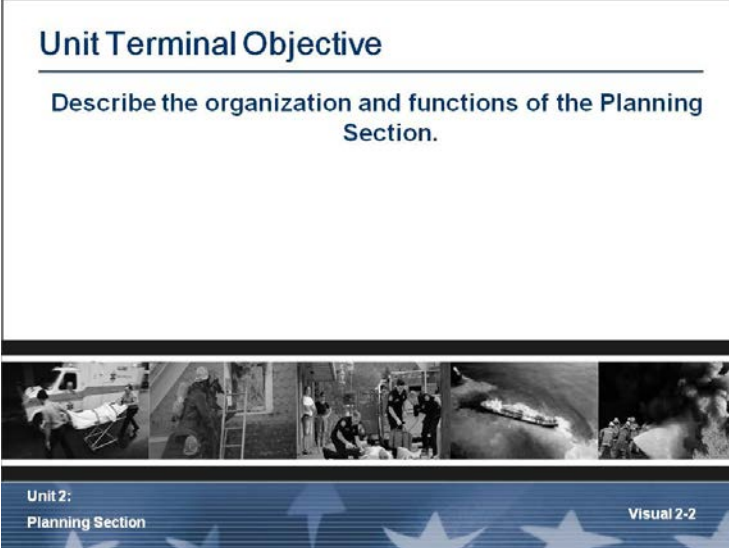
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**Scope Statement**

Through this unit, students will gain a general understanding of the organization and functions of the Planning Section. Through discussion of the units, functions, and processes of the Planning Section, the students will gain insight into the broader context of the Resources Unit Leader's work.

Topic Unit Terminal Objective

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The slide features a white background with a blue border. At the top, the title "Unit Terminal Objective" is written in blue. Below the title, the objective text "Describe the organization and functions of the Planning Section." is centered in blue. A horizontal strip of five small black-and-white photographs is positioned below the text, showing various emergency response scenarios. At the bottom, a blue banner contains the text "Unit 2: Planning Section" on the left and "Visual 2-2" on the right, with a pattern of white stars.

**Unit Terminal Objective**

Describe the organization and functions of the Planning Section.

Unit 2:  
Planning Section

Visual 2-2

## Key Points

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### **Unit Terminal Objective**

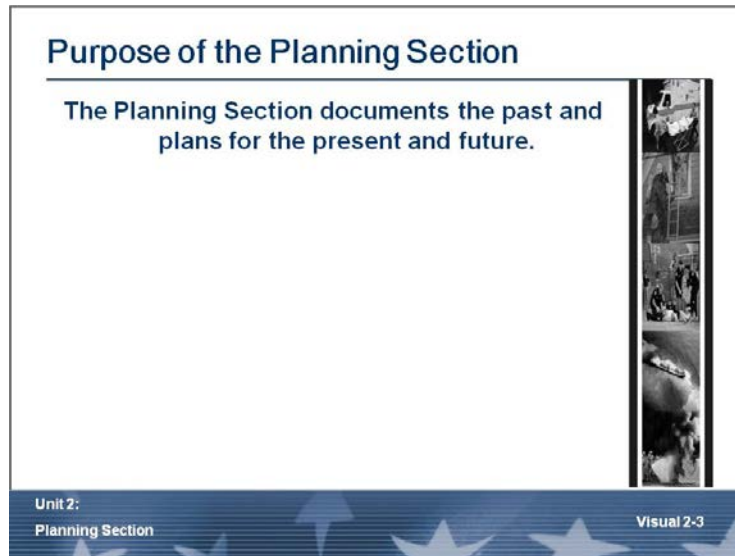
Describe the organization and functions of the Planning Section.

### **Unit Enabling Objectives**

- Define the purpose of the Planning Section
- Describe the Planning Section's positions and their functions
- Describe the planning process and the Planning P
- Describe the Resources Unit Leader's input in the planning process

**Topic** Purpose of the Planning Section

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**Key Points**

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## The Planning Section:

- Looks at what is going on right now to see if changes need to be made in the present
- Anticipates future operational needs in order to be ready for them
- Has a process in place that will get the resources that are needed to make the next operational period successful
- Has a solid documentation process, which is more important now than ever before. Auditors will come in after the fact to go through documentation, and it is to your advantage to make it as easy as possible for them


**Topic** Purpose of the Planning Section (cont.)

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**Purpose of the Planning Section (cont.)**

**Supports the Incident Commander (IC)**

- Incident objectives
- Overall incident management planning and intelligence



Unit 2:  
Planning Section

Visual 2-4

### Key Points

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Incident objectives should be SMART: Specific, Measurable, Achievable, Realistic, and Timely.

**Topic** Purpose of the Planning Section (cont.)

**Purpose of the Planning Section (cont.)**

**Supports the Operations Section**

- Incident Action Plan (IAP)
- Incident projections
- Contingency planning

**Supports all of the IMT**

Unit 2:  
Planning Section

Visual 2-5

**Key Points**

The Operations Section's customers are the public, who are external customers. The Planning Section deals mostly with internal customers. The Operations Section is an internal customer of the Planning Section.

The Incident Action Plan (IAP) is documentation of the incident. The Resources Unit Leader:

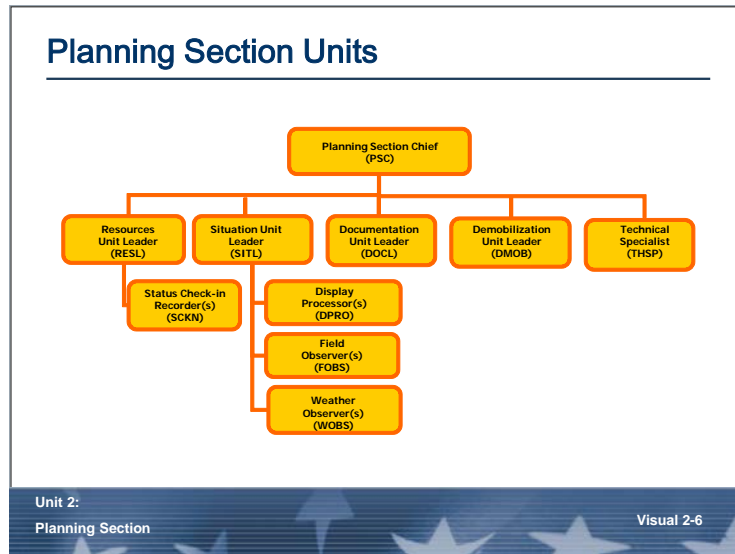
- Contributes to documents and consolidates the IAP
- Updates the IAP as needed (for example, when resources are moved to another division)
- Is responsible for making notes of any changes or corrections made to the IAP at the Operational Period Briefing and then including that "red lined" corrected copy of the IAP in the incident files kept for documentation
- Works with the Operations Section to make sure that the necessary information is coming in.

More details on the IAP will be provided in Unit 7

The Resources Unit Leader knows about the resources on the ground. The Operations Section Chief may ask the Resources Unit Leader for information about resources for the next operational period. This information aids in making incident projections. Contingency planning affects all members of the IMT.



## Topic Planning Section Units



## Key Points

Other resources that may be in the Situation Unit include the Fire Behavior Analyst (FBAN) (wildland), HAZMAT modeling (HAZMAT), epidemiologist (public health), and morgue (criminology).

The Documentation Unit duplicates the IAP (for example, makes arrangements with a local copy center if possible). The Planning Section can just email the IAP to a local copy center and save a lot of time, especially if there are multiple operational periods in a single day. The Documentation Unit Leader can also present the incident through their records.

## Resources Unit

Ensures that all assigned personnel and other resources have checked in at the incident site. This unit creates a system for keeping track of all assigned resources and should maintain a master list of all resources.

## Situation Unit

Collects, processes, and organizes ongoing situation information; prepares situation summaries; and develops projections and forecasts of future events related to the incident. The Situation Unit also prepares maps and gathers and disseminates information and intelligence for use in the IAP. This Unit may also require the expertise of Technical Specialists and Operations and Information Security Specialists.

**Documentation Unit**

Maintains accurate and complete incident files, including a complete record of the major steps taken to resolve the incident; provides duplication services to incident personnel; and files, maintains, and stores incident files for legal, analytical, and historical purposes.

**Demobilization Unit**


Develops an Incident Demobilization Plan that includes specific instructions for all personnel and resources that will require demobilization.

**Topic**            The Planning Process

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**The Planning Process**

The process the Command and General Staff (C&G) use to develop incident objectives, strategies, and tactics for each operational period.



Unit 2:  
Planning Section

Visual 2-7

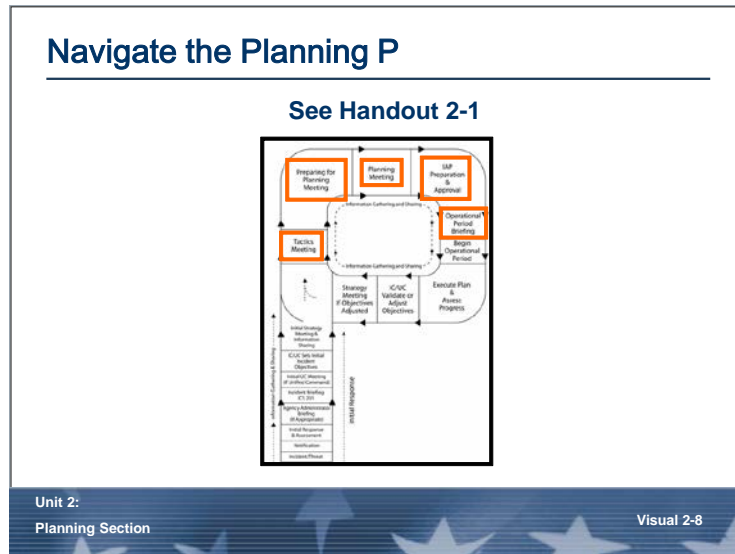
**Key Points**

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**The Planning Process**

- Incident objectives are statements of what will be accomplished
- Strategies establish the general plan or direction for accomplishing the incident objectives
- Tactics specify how the strategies will be executed
- An operational period is a designated time period in which tactical objectives need to be accomplished and evaluated

**Topic**                      Navigate the Planning P



**Key Points**

The Resources Unit Leader is first notified about an incident or threat that's occurring. The IMT is on alert.

The Resources Unit Leader then arrives on the scene and receives an Initial Briefing from whoever may be first on the scene.

The Resources Unit Leader provides resources information on the ICS Form 215, Operational Planning Worksheet, at the Tactics Meeting. The Operations Section Chief gives the necessary information to the Resources Unit Leader in order for him or her to prepare the ICS Form 215. The Resources Unit Leader generally acts as a scribe at the meeting.

The Resources Unit Leader should go back and confirm or deny the information before it is presented at the Planning Meeting.

At the Planning Meeting, the Resources Unit Leader acts as a scribe and takes notes on any changes, especially on the ICS Form 215, Operational Planning Worksheet.

Following the Planning Meeting, the Resources Unit Leader puts the IAP together. This involves collecting all of the pieces of the IAP and getting it into the final format to send to the printer.

The Resources Unit Leader takes the master IAP and makes any changes. He or she may do roll call, which is highly recommended in order to document who was at the Operational Period Briefing.

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

The Planning Section Chief is responsible for seeing that the planning process and timeframes are adhered to.

The Planning Cycle requires the completion of five major items:

- Tactics Meeting
- Planning Meeting
- IAP Preparation
- Operational Period Briefing
- Execution of the plan and the assessment of progress

The Resources Unit Leader plays a key role in the Tactics Meeting, Planning Meeting preparation, the Planning Meeting itself, IAP preparation and approval, and the Operational Period Briefing.

The Resources Unit Leader should always be thinking:

- What is happening now?
- What is going to happen soon?
- What is going to happen later?

## Topic

Objectives Review

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**Objectives Review**

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- 1. What is the purpose of the Planning Section?*
- 2. What are the four Units within the Planning Section?*
- 3. What is the purpose of the planning process?*
- 4. Name and explain a step in the Planning P where the Resources Unit Leader participates.*

Unit 2:  
Planning Section

Visual 2-9

**Key Points**

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**Unit Terminal Objective**

Describe the organization and functions of the Planning Section.

**Unit Enabling Objectives**

Define the purpose of the Planning Section

- Describe the Planning Section's positions and their functions
- Describe the planning process and the Planning P
- Describe the Resources Unit Leader's inputs in the planning process