Objectives

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

- Participate as a Resources Unit Leader in the planning process
- Identify the key players in the Tactics and Planning Meetings
- List the responsibilities of the Resources Unit Leader during the Tactics and Planning Meetings
- List the purposes of ICS Form 215, Operational Planning Worksheet; the Incident Action Plan (IAP); and ICS Form 215A, Incident Action Plan Safety Analysis
- Complete the Resources Unit Leader’s portion of ICS Form 215 and identify needed and excess tactical resources using ICS Form 213, General Message Form

Methodology

This unit uses lecture, an exercise, and discussion.

Knowledge of unit content will be evaluated through practical exercises or simulations and the administration of the Final Exam upon completion of the course.
## Time Plan

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.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lesson</td>
<td>2 hours</td>
</tr>
<tr>
<td>Exercise 5</td>
<td>2 hours</td>
</tr>
<tr>
<td><strong>Total Time</strong></td>
<td><strong>4 hours</strong></td>
</tr>
</tbody>
</table>
Key Points

Scope Statement

Through this unit, students will learn the Resources Unit Leader’s responsibilities in key meetings during the planning process. This will cover tasks performed before, during, and after the meetings, as well as required documents and interactions with other IMT staff.
Unit 6 Operational Planning

**Topic**  
Unit Objectives

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**Unit Terminal Objective**

Participate as a Resources Unit Leader in the planning process.

**Key Points**

**Unit Terminal Objective**

Participate as a Resources Unit Leader in the planning process.

Remind students that the Final Exam questions are based on the Unit Enabling Objectives.

**Unit Enabling Objectives**

- Identify the key players in the Tactics and Planning Meetings
- List the responsibilities of the Resources Unit Leader during the Tactics and Planning Meetings
- List the purposes of ICS Form 215, Operational Planning Worksheet; the Incident Action Plan (IAP); and ICS Form 215A, Incident Action Plan Safety Analysis
- Complete the Resources Unit Leader’s portion of ICS Form 215 and identify needed and excess tactical resources using ICS Form 213, General Message Form
<table>
<thead>
<tr>
<th>Topic</th>
<th>Tactics Meeting</th>
</tr>
</thead>
</table>

**Key Points**

Tactics Meeting:
Tactics Meeting

- Determine how to accomplish selected strategy
- Identify resources needed to implement the tactics
- Purpose: Review the tactics developed by the Operations Section Chief

Key Points

The Tactics Meeting is rather informal. It typically occurs 1 to 3 hours prior to the Planning Meeting and tends to be very brief.

The Incident Commander sets the initial objectives. The Operations Section Chief provides direction regarding how the resources will be deployed to complete the Incident Commander’s objectives. The decisions are documented on ICS Form 215, Operational Planning Worksheet. This blueprint for tactical deployment for the next operational period will be developed and revised before the Planning Meeting where formal deployment of resources and work assignments will be approved.
Topic  Resources Unit Leader’s Role in the Tactics Meeting

Key Points

The Operations Section Chief completes ICS Form 215 with the assistance of the Resources Unit Leader. The Operations Section Chief develops the Tactical Plan, which identifies the Operations Section’s organization, work assignments, and type and quantity of required resources. The Resources Unit Leader, using the resource tracking system, identifies the resources for the Have row on ICS 215. There are several acceptable approaches for preparing for the Tactics Meeting. The Operations Section Chief:

- Fills out the form completely before the meeting
- Brings a sketched-out, rough draft to the meeting
- Begins the process during the meeting

It is important for the Resources Unit Leader to meet with the Operations Section Chief before the Tactics Meeting. If he or she has a relationship with the Planning Section Chief and the Incident Commander, this will encourage the Operations Section Chief to take time to come in from the field for a meeting. The Operations Section Chief can take a smaller ICS Form 215 out into the field, make notes on it, and then give it to the Resources Unit Leader when he or she returns from the field. Then, the Resources Unit Leader can clean it up and get it ready for the meeting.
**Key Points**

The Resources Unit Leader should also be gathering information regarding the resources needed for the next operational period and what resources the incident has on hand.

The Resources Unit Leader should be prepared to provide resource information as needed. He or she should have this information readily available.
Key Participants

Required:
- Operations Section Chief (OSC)
- Safety Officer (SOFR)
- Logistics Section Chief (LSC)
- Planning Section Chief (PSC)
- Resources Unit Leader (RESL)

Key Points

The Operations Section Chief provides direction regarding how the resources will be deployed to meet the Incident Commander’s objectives. The decisions are documented on ICS Form 215.
After addressing the key roles, explain the optional roles. Other positions may attend the meeting, but this is not mandatory and may vary by incident. These include the Planning Section Chief, the Situation Unit Leader, and the Air Operations Branch Director.
Topic
ICS Form 215 – Operational Planning Worksheet

Key Points
ICS Form 215, Operational Planning Worksheet:
**Purpose of the ICS Form 215**

- Documents tactical resource required to accomplish the plan
- Visually displays operational decisions
- Identifies shortages or excess resources
- Determines logistical support needs for the incident
- See Handout 6-1

**Key Points**

ICS Form 215 documents the decisions made during the Tactics Meeting and agreed to at the Planning Meeting.

The Planning P diagram on this slide illustrates that finalizing ICS Form 215 is part of preparing for the Planning Meeting.
Topic  Completing the ICS Form 215

Completing the ICS Form 215

General Guidelines:
- Complete the form using a hard copy or digital version
- Format can be modified to meet incident needs, but intent needs to remain the same
- Needs to be large enough so all attendees can view it
- Digital version can be projected onto the wall using a projector

Key Points

There are a number of different formats for ICS Form 215, but they all work very similarly.
Topic  Fort Davis Incident

Key Points

The next few slides demonstrate in detail how to complete ICS Form 215, ICS Form 215A, and ICS Form 214. They use a new scenario that is not connected to the continuing scenario that is used in the exercises throughout the rest of the course.
Topic: ICS Form 215

Key Points

Completing ICS Form 215:

<table>
<thead>
<tr>
<th>Block Number</th>
<th>Block Title</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Incident Name</td>
<td>Enter the name assigned to the incident.</td>
</tr>
<tr>
<td>2</td>
<td>Operational Period</td>
<td>Enter the start date (month/day/year) and time (24-hour clock) and end date and time for the operational period to which the form applies.</td>
</tr>
<tr>
<td></td>
<td>Date and Time From</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Date and Time To</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Branch</td>
<td>Enter the Branch of the work assignment for the resources.</td>
</tr>
<tr>
<td>4</td>
<td>Division, Group, or Other</td>
<td>Enter the Division, Group, or other location (e.g., staging area) of the work assignment for the resources.</td>
</tr>
<tr>
<td>Block Number</td>
<td>Block Title</td>
<td>Instructions</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>5</td>
<td>Work Assignment and Special</td>
<td>Enter the specific work assignments given to each of the Divisions/Groups and any special instructions, as required.</td>
</tr>
<tr>
<td></td>
<td>Instructions</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Resources</td>
<td>Complete the resource headings for the category, kind, and type as appropriate for the incident. The use of a slash indicates a single resource in the upper portion of the slash and a Strike Team or Task Force in the bottom portion of the slash.</td>
</tr>
<tr>
<td></td>
<td>• Required</td>
<td>Enter, for the appropriate resources, the number of resources by type (for example, engine, squad car, Advanced Life Support ambulance) required to perform the work assignment.</td>
</tr>
<tr>
<td></td>
<td>• Have</td>
<td>Enter, for the appropriate resources, the number of resources by type (for example, engines, crew) available to perform the work assignment.</td>
</tr>
<tr>
<td></td>
<td>• Need</td>
<td>Enter the number of resources needed by subtracting the number in the Have row from the number in the Required row.</td>
</tr>
<tr>
<td>7</td>
<td>Overhead Position(s)</td>
<td>List any supervisory and nonsupervisory ICS position(s) not directly assigned to a previously identified resource (for example, Division/Group Supervisor, Assistant Safety Officer, Technical Specialist).</td>
</tr>
<tr>
<td>8</td>
<td>Special Equipment and Supplies</td>
<td>List special equipment and supplies, including aviation support, used or needed. This may be a useful place to monitor span of control.</td>
</tr>
<tr>
<td>9</td>
<td>Reporting Location</td>
<td>Enter the specific location where the resources are to report (for example, staging area, location at incident).</td>
</tr>
<tr>
<td>10</td>
<td>Requested Arrival Time</td>
<td>Enter the time (24-hour clock) that resources are requested to arrive at the reporting location.</td>
</tr>
<tr>
<td>Block Number</td>
<td>Block Title</td>
<td>Instructions</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>11</td>
<td>Total Resources Required</td>
<td>Enter the total number of resources required by category, kind, and type as preferred (for example, engine, squad car, ALS ambulance). A slash can be used again to indicate total single resources in the upper portion of the slash and total Strike Teams or Task Forces in the bottom portion of the slash.</td>
</tr>
<tr>
<td>12</td>
<td>Total Resources Have on Hand</td>
<td>Enter the total number of resources on hand assigned to the incident for incident use. A slash can be used again to indicate total single resources in the upper portion of the slash and total Strike Teams or Task Forces in the bottom portion of the slash.</td>
</tr>
<tr>
<td>13</td>
<td>Total Resources Need to Order</td>
<td>Enter the total number of resources needed. A slash can be used again to indicate total single resources in the upper portion of the slash and total Strike Teams or Task Forces in the bottom portion of the slash.</td>
</tr>
<tr>
<td>14</td>
<td>Prepared by</td>
<td>Enter the name, ICS position, and signature of the person preparing the form. Enter the date (month/day/year) and time prepared (24-hour clock).</td>
</tr>
<tr>
<td></td>
<td>• Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Position/Title</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Signature</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Date/Time</td>
<td></td>
</tr>
</tbody>
</table>

Record information accurately, completely, and legibly.

Include non-operational line resources (for example, Safety Officer, Field Observer, EMT).

The intent is for the Division Supervisor to quickly get the information that he or she needs.

Check the span of control as you fill in ICS Form 215.

Work with the Operations Section Chief to determine the required resources. Determine shortages or excesses of the required resources by comparing what you have and what the Operations Section requires. If there are resource requirements that cannot be met, ask the Operations Section if they would like to change the required quantity.
ICS Form 215A is used by the Resources Unit Leader to complete ICS Form 204, Assignment List.
Key Points

The Safety Officer may ask the Resources Unit Leader to write special instructions on ICS Form 204. Much of that information comes from ICS Form 215A.

The Operations Section Chief is responsible for determining which resource works in each Division or Group. This responsibility may be delegated to the Resources Unit Leader. It is a good idea to ask the Operations Section if there is a specific resource that they would like to assign to a particular Division or Group. If a resource has worked in a particular Division or Group before, it may be beneficial to assign them to the same Division or Group because they have helpful institutional knowledge.
Topic

Planning Meeting

Key Points

Planning Meeting:
### Key Points

The Planning Meeting provides the opportunity for the Command and General Staff to review ICS Form 215, and to support and approve the plan for the next operational period.

The Operations Section Chief describes the amount and type of resources that will be needed to accomplish the plan. The Resources Unit Leader works with the Logistics Section Chief to fulfill the resource needs. At the end of the meeting, the Planning Section Chief indicates when all elements of the plan and the support documents must be submitted so that the plan can be collated, duplicated, and made ready for the Operational Period Briefing.

The Agency Administrator or his or her representative may attend the Planning Meeting. It is important to get buy-in, particularly if the agency will be providing the funding.

It is important for the Resources Unit Leader to take notes during the Planning Meeting. There will probably be critical information shared regarding resource availability.
Key Points

Prior to the Planning Meeting, transfer information from ICS Form 215 to the wall-sized ICS Form WS215, Operational Planning Worksheet, and display it during the meeting. This is important so that everyone can see it and the Operations Section Chief can speak with regard to it.

The Resources Unit Leader may not be very involved during the Planning Meeting. If the Planning Section Chief is going to present, the Resources Unit Leader must give him or her the necessary information ahead of time.
Topic: Key Participants and Tasks

Key Participants and Tasks

1. Briefing on situation and resource status  
2. Set and review incident objectives  
3. Identify assignments  
4. Specify tactics  
5. Specify safety mitigation measures  
6. Specify resources needed  
7. Specify Operations facilities and reporting locations  
8. Develop resource and personnel order  
9. Consider communications, medical, and Traffic Plan requirements  
10. Finalize, approve, and implement IAP

<table>
<thead>
<tr>
<th>Task Description</th>
<th>PSC</th>
<th>IC</th>
<th>OSC</th>
<th>SOFR</th>
<th>LSC</th>
<th>PSC</th>
<th>IC</th>
<th>OSC</th>
<th>LSC</th>
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</thead>
<tbody>
<tr>
<td>Briefing on situation and resource status</td>
<td>PSC</td>
<td>IC</td>
<td>OSC</td>
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<td>Set and review incident objectives</td>
<td>IC</td>
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<td>Identify assignments</td>
<td>OSC</td>
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<tr>
<td>Specify tactics</td>
<td>OSC</td>
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<td></td>
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<tr>
<td>Specify safety mitigation measures</td>
<td>SOFR</td>
<td></td>
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<tr>
<td>Specify resources needed</td>
<td>OSC, PSC</td>
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<tr>
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<td>OSC, PSC, LSC</td>
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<tr>
<td>Develop resource and personnel order</td>
<td>LSC</td>
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<td></td>
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<tr>
<td>Consider communications, medical, and Traffic Plan</td>
<td>LSC, PSC</td>
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<td>requirements</td>
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<td>Finalize, approve, and implement IAP</td>
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</table>

Key Points

The Planning Meeting is a very important part of the planning process, and it is important that the Resources Unit Leader understands the key players.
## RESL's Role After the Planning Meeting

- Notify DMOB and Operations Section Chief of surplus tactical resources
- Assign specific resources to Division or Group to satisfy resource requirements as identified by Operations Section Chief on ICS Form 215
- Clarify info needed to develop work products and develop work products to include in the IAP
- Clarify with Operations Section Chief how they want resources assigned
- Order needed tactical resources as identified on the ICS Form 215

### Key Points

Define the Resources Unit Leader’s role after the Planning Meeting.

The final bullet, “Order needed tactical resources as identified on the ICS Form 215,” is an introduction to the next slide, which explains how to order additional resources using ICS Form 213.
ICS Form 213 - General Message

Used to order needed tactical resources as identified on the ICS Form 215.

See Handout 6-4

Key Points

Handout 6-4: ICS Form 213 – General Message Form

The Operations Section or the Planning Section could order these resources.

Official approval for ICS Form 213, General Message Form, does not occur until during or after the Planning Meeting; therefore, the order for additional resources is not placed yet.
Topic

Exercise 5: ICS Form 215

Key Points

The purpose of Exercise 5 is to provide the participants with experience working with ICS Forms 215 and 215A to determine resources shortages, surpluses, and needs.
Topic: Operational Period Briefing

Key Points:
Operational Period Briefing:
Operational Period Briefing

Purpose:
- Present the IAP to supervisors of tactical resources
- Opportunity to ask questions regarding the plan
- Be briefed on any critical operational or safety issues, and gather logistical information
- May be referred to as the Operations Briefing or the Shift Briefing

Key Points

An Operational Period Briefing is held just before the start of each operational period to present the Incident Action Plan to the Operational Resources. If needed, each member of the Command and General Staff who has a part in the IAP makes a short presentation to clarify procedures. All of the supervisors of the tactical resources to be employed during that period should attend an Operational Period Briefing. In some cases, all of the tactical personnel should also attend if they can be accommodated.

The Planning Section Chief and Operations Section Chief share the responsibility for the Operational Period Briefing. The Planning Section Chief is responsible for conducting the briefing. The Operations Section Chief has the responsibility for ensuring that all operations personnel are adequately briefed. This may require additional briefings after the primary Operational Period Briefing.

The Resources Unit Leader may or may not attend the Operational Period Briefing, but he or she must be ready to support the Planning Section Chief in whatever manner necessary. The main objective for the Resources Unit Leader is to identify excess supplies or unassigned resources and to get the Operations Section Chief to make a decision regarding where to put them.
Role of each of the key participants at the Operational Period Briefing:
Topic: Objectives Review

Objectives Review

1. *Who are the key players in the Tactics and Planning Meetings?*
2. *What are the Resources Unit Leader’s responsibilities before, during, and after these meetings?*
3. *What is the purpose of the ICS Form 215?*

Key Points

**Unit Terminal Objective**

Participate as a Resources Unit Leader in the planning process.

**Unit Enabling Objectives**

- Identify the key players in the Tactics and Planning Meetings
- List the responsibilities of the Resources Unit Leader during the Tactics and Planning Meetings
- List the purposes of ICS Form 215 and ICS Form 215A
- Complete the Resources Unit Leader’s portion of ICS Form 215 and identify needed and excess tactical resources using ICS Form 213