

Future Concept
Intent-Based Position Task Book

Operations Section Chief Type 3
(OSC3)



Intent Based PTB - Beta

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MCS Mission-Centered Solutions



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Overall Intent and Format of Position Task Book

Task

Document training experience that demonstrates the individual possesses key competencies, knowledge skills, and abilities.

Purpose

Record the experience of a trainee in suitable on-the-job, training, exercise and incident environments, documenting both judgment and performance. Enable evaluators to provide accurate observations and constructive feedback to the trainee. The Position Task Book (PTB) is divided into core competencies and tasks. The purpose of the tasks is to help build a portfolio of evidence that the trainee has demonstrated each competency, and possesses sufficient ability to perform the job. The spaces provided for recording a narrative of the observed performance is to provide the trainee with constructive feedback on strengths to sustain and areas needing improvement.

End State

This task book has provided a complete and robust record of performance by the trainee, allowing the approving entity to make an informed decision regarding the individual's readiness for certification.

Example Format

Competency Ø: Mission Essential Task Area

Intent

Task

A clear statement describing what all the tasks and sub tasks of a competency area are meant to accomplish as a whole.

Purpose

A description of why the competency area is important and how it fits in with the job as a whole and influences mission success of the Incident Management Team (IMT).

End State

A condition-based statement (past or present tense) that describes what success in each competency looks like.

Success conditions

- Condition-based, written in past or present tense.
- Bullet statements breaking the competency end state down into smaller descriptive elements.
- Provided context of conditions and standards to quantify performance.
- Decreased evaluator subjectivity, focused on behavior observed or heard.
- Formed the basis of written and verbal feedback between evaluator and trainee.

Task 0.1: Major Task within competency area

Sub-task	Date	Evaluator	Signature
0.1.1	Action statement describing sub element of major task.		
0.1.2	Captures both process and behaviors.		
Final version would include all the appropriate "Task Codes" i.e. Major Incident, OJT, Training, Exercise.			

Observation Notes

1	Date	Event	Evaluator	Signature

Plenty of space for narrative evaluator notes on each major task – either book form or computer based. "1" is the first evaluated event like an incident or exercise.

2	Date	Event	Evaluator	Signature

3	Date	Event	Evaluator	Signature

4	Date	Event	Evaluator	Signature

Summary of Evaluation for Competency 0

1	Date	Event	Evaluator	Signature

In addition to space to evaluate each major task, at the end of each Competency Area is space for narrative evaluator notes to summarize overall performance for that competency area. This could also include numerical "behavior assessments" similar to the NWCQ PTB Field Test.

2	Date	Event	Evaluator	Signature

3	Date	Event	Evaluator	Signature

4	Date	Event	Evaluator	Signature

Competency 1: Mobilize Section

Intent

Task

Develop and utilize techniques, tactics, and procedures to ensure preparedness, notify team members, and mobilize the Section to the incident.

Purpose

To arrive prepared at an incident.

Pre-mobilization, the OSC understands the status of their assigned team and sub leaders. The incoming OSC needs to have the reference materials, forms, supplies, equipment, and other items appropriate for the particular incident response to be properly prepared and know how to use them effectively. The incoming OSC needs to **begin** to understand the current situation and build a sound Common Operating Picture (COP) as early as possible in order to begin preparing to make sound decisions.

End State

The Operations Section has arrived at incident prepared to begin transitioning to the formal acceptance of responsibility for the section.

Success conditions

- Proactively obtained relevant information.
- Was aware of team status and situation of individuals within the section.
- Encouraged others to ask questions and provide feedback to make sure that everyone's situation awareness reflected the current information available.
- Communicated effectively and established a foundation that built trust and enabled the team to develop cohesion within the section and with peer C&GS.
- Allowed people to have input into their assignments to increase commitment.
- Showed respect for outgoing team and established a positive relationship with outgoing counterparts.
- Assimilated situation awareness with a logical, macro to micro approach. Understood the big picture and priorities of values at risk before focusing on tactical details.

Task 1.1: Conduct pre-execution activities

	Sub-task	Date	Evaluator	Signature
1.1.1	Ensure availability, qualifications and capabilities of section for an assignment.			
1.1.2	Ensure section responds appropriately to dispatch.			
1.1.3	Arrive properly equipped at designated location within realistic time frame for situation.			
1.1.4	Check in properly at incident.			

Observation Notes

1	Date	Event	Evaluator	Signature

Only including one event's observation notes for brevity of example. Four evaluation events would be included.

Task 1.2: Ensure availability, qualifications and capabilities of resources.

	Sub-task	Date	Evaluator	Signature
1.2.1	Evaluate section members and resources and make appropriate adjustments to meet incident requirements.			
1.2.2	Identify needed Section team members and make adjustments or order replacements.			

Observation Notes

1	Date	Event	Evaluator	Signature

Task 1.3: Assimilate current common operating picture

Sub-task	Date	Evaluator	Signature
1.3.1	Initiate a gap analysis for the operations mission to determine current efforts, establish operational priorities, and resource needs.		
1.3.2	Analyze the political, social, economic, security, infrastructure and information issues with potential to significantly impact priorities in operations.		
1.3.3	Participate in initial team meeting and/or lead/facilitate initial operations section meeting.		
1.3.4	Identify existing lines of effort and scope of operations.		
1.3.5	Collect information from outgoing Operations Section Chief, initial Incident Commander or other personnel responsible for incident prior to your arrival.		
1.3.6	Identify ordering points and processes		

Observation Notes

1	Date	Event	Evaluator	Signature

Summary of Evaluation for Competency 1

1	Date	Event	Evaluator	Signature

Only including one event's summary notes for brevity of example. Four evaluation events would be included.

Competency 2: Transition to Formal Assumption of Responsibility

Intent

Task

Transition to formally accepting the position of OSC3 for the incident.

Purpose

In order to assume command of the section and be able maximize the ability to make the best decisions in the situation, the incoming OSC strengthens the COP, including the incident's history, and its current and projected growth, complexity, and consequences. The OSC also begins to build relationships and strengthen the command climate.

End State

The OSC has formally assumed responsibility for leading the section with the best COP available and has projected a positive command presence.

Success Conditions

- Demonstrated strong personal integrity and character to set a positive tone. Was an effective ambassador for the team.
- Communicated effectively to fully understand and evaluate incident information. Shared appropriate information to other sections.
- Projected a demeanor that is calm, organized, and focused to build a positive effect on the command climate.
- Established mutual respect with all affected people (responders, support, host, public) in the incident environment.
- Built trust internally and externally through demonstrated knowledge and effective use of ICS and other doctrinal processes.
- Used a mental model of the incident, it's values at risk and end state, as a whole.
- Clearly understood implications of both the strategic and tactical risks on the incident.
- Was capable of performing tasks acceptably in a time compressed and stressful environment.

Task 2.1: Update IMT's common operating picture

	Sub-task	Date	Evaluator	Signature
2.1.1	Confirm resource ordering process			
2.1.2	Establish effective command presence and relationships with relevant personnel.			
2.1.3	Understand scope, roles, responsibilities, jurisdiction and authority of responder agencies.			
2.1.4	Debrief the outgoing person responsible for operations.			
2.1.5	Gather information necessary to assess incident assignment and determine immediate needs, hazards and actions.			
2.1.6	Obtain briefing from the Agency Administrator or equivalent.			
2.1.7	Obtain briefing from your Incident Commander.			

Observation Notes

	Date	Event	Evaluator	Signature
1				

Task 2.2: Establish Operations Section

	Sub-task	Date	Evaluator	Signature
2.2.1	Establish appropriate operational tempo and rhythm			
2.2.2	Brief tactical elements (Branches, Divisions/Groups, Task Force/Strike-Team Leaders) with appropriate detail on tactical assignments.			
2.2.3	Emphasize priorities, strategies, objectives, and end state when communicating with resources.			
2.2.4	Brief Staging Area Manager on types and numbers of resources to be maintained in Staging, method of communication, and deployment process			
2.2.5	Create a work environment that provides mutual respect and equal opportunity for all personnel assigned to the incident.			
2.2.6	Ensure assigned contracted resources meet and are used within contract specifications.			
2.2.7	Establish positive interpersonal and interagency working relationships.			
2.2.8	Coordinate with all other command staff, general staff and appropriate Unit Leaders.			
2.2.9	Participate in scheduled and impromptu C&GS meetings and meet established deadlines for due outs.			

Observation Notes

1	Date	Event	Evaluator	Signature

Summary of Evaluation for Competency 2

1	Date	Event	Evaluator	Signature

Competency 3: Develop Leader's Intent

Intent

Task

Actively assists IC in developing incident task, purpose, end state, objectives and strategies with other key command and general staff members. Lead the development of tactics for the incident by operations personnel, enabling them to exercise their initiative and judgment to achieve incident objectives and priorities.

Purpose

To implement intent-driven mission planning and have significant input to intent, end state, objectives, and strategy. To develop a tactical plan whose acceptable risks are clearly communicated and appropriately aligned with the prioritized values at risk of the incident.

End State

Leader's intent has been developed, including sound incident tactics in association with incident objectives and strategies.

Success Conditions:

- Acted as a productive staff member and leader to produce concentric action collaboratively with peers and sub leaders.
- Incorporated appropriate input from peers, sub leaders and experts during planning.
- Asked others to help when appropriate, such as when overwhelmed by op-tempo.
- Managed personal habits or idiosyncrasies of self and others that caused friction in team discussions.
- Showed initiative in preparing information and problem solving prior to meetings.
- Applied critical thinking and sound judgment during the planning process and in problem solving.
- Identified or validated priorities of values-at-risk and the incident end state.
- Developed appropriate objectives, strategies, and tactics aligned to the end state.
- Able to analyze, determine and communicate acceptable risks appropriate to the values-at-risk and complexity of the incident.
- Was capable of performing tasks acceptably in a time compressed and stressful environment.
- Was willing to own the team result and was invested in team decisions.

Task 3.1: Support development of incident Intent

	Sub-Task	Date	Evaluator	Signature
3.1.1	Provide primary input to the development of the IC's leader's intent for the incident response.			
3.1.2	Articulate values to be protected (life, property, infrastructure, environment, etc.)			
3.1.3	Work with IC and peer C&GS members to weigh, prioritize, and resolve competing political and cultural interests and values at risk			
3.1.4	Collaborate with and solicit input of affected agencies and/or the public.			
3.1.5	Contributes to development of SMART objectives.			
3.1.6	Establish operational period in coordination with the IC.			
3.1.7	Determine location of current Staging Areas and resources assigned there.			
3.1.8	Evaluate problems and concerns, such as evacuation, sheltering, aviation and safety.			

Observation Notes

	Date	Event	Evaluator	Signature
1				

Task 3.2: Develop Tactical Intent

Sub-Task	Date	Evaluator	Signature
3.2.1	Develops appropriate strategies aligned with values at risk and the end state.		
3.2.2	Incorporates any “Incident within the Incident Plan” or other contingencies as appropriate into tactical operational plan.		
3.2.3	Lead the Tactics meeting.		
3.2.4	Develops appropriate incident boundaries, divisions and perimeters.		
3.2.5	Provide data and ensure completion of the operational portion of IAP as part of ICS 215 (Operational Planning Worksheet).		
3.2.6	Assist both in completing and validating the health and safety ICS 215A (Incident Action Plan Safety Analysis).		
3.2.7	Identifies and validates residual and post-mitigation acceptable risks.		
3.2.8	Collaborate with the safety officer to jointly recommend acceptable risks to C&GS in support of plan.		

Observation Notes

1	Date	Event	Evaluator	Signature

Summary of Evaluation for Competency 3

1	Date	Event	Evaluator	Signature

Competency 4: Optimize the Operations Section

Intent

Task

Improve and align the Operations Section to meet current and anticipated incident needs, ordering additional and specialty resources as necessary to meet the particular nature of the incident and response.

Purpose

In order to foster concentric action for the incident response, utilize the flexibility of the Incident Command System to organize operations resources to meet the existing and anticipated needs of the incident.

End State

The Operations Section has been organized and staffed appropriately to achieve the incident objectives and priorities.

Success Conditions

- Encouraged open communications and healthy conflict to draw on diverse opinion, expertise, and perspective in accomplishing the mission.
- Sought input and delegated responsibility and authority to increase commitment among team members.
- Employed an open system of tracking and reporting to promote common knowledge of individual commitments and incident time frames.
- Noticed when other team members needed help and then offered assistance to them.
- Implemented risk management processes and practices appropriate to the anticipated and acceptable risks
- Used ICS and team templates, tools and SOPs effectively to expedite decision making and manage time constraints.
- Communicated and ensured understanding of expectations within the chain of command.
- Used the appropriate leadership style as the section matured and fully engaged with the incident.
- Was flexible and adaptable, leading and managing through increasing tempo and change.
- Was capable of performing tasks acceptably in a time compressed and stressful environment.

Task 4.1: Manage the structure (form) of the organization

Sub-task	Date	Evaluator	Signature
4.1.1	Adjust perimeters, as necessary, to ensure scene security		
4.1.2	Assure execution of appropriate administrative requirements (to include documentation, ICS forms, personnel and equipment time records, performance ratings).		
4.1.3	Demonstrate knowledge of ICS structure, principles, positions and ICS forms.		
4.1.4	Establish process and graphics for contingency planning.		
4.1.5	Use the Risk Management Process in all planning and implementation activities. Ensure the Risk Management Process is established and maintained throughout the operations section.		
4.1.6	Continually re-evaluates incident expansion and potential, organizational effectiveness of current IAP or relevant plan and adjust as necessary.		
4.1.7	Maintain appropriate span of control.		
4.1.8	Supervise the operations organization as it expands.		
4.1.9	Monitor the operations organization and adjust as necessary to ensure alignment with the incident objectives and end state.		

Observation Notes

1	Date	Event	Evaluator	Signature

Task 4.2: Manage the action (function) of the organization

	Sub-task	Date	Evaluator	Signature
4.2.1	Comply with agency/organization health and safety requirements.			
4.2.2	Implement and enforce appropriate safety procedures, use of protective clothing, and equipment.			
4.2.3	Manage fatigue and provide rest as appropriate to all operators and support staff			
4.2.4	Monitor operations and request additional people and resources, as needed.			
4.2.5	Evaluate tactical effectiveness of current IAP or relevant plan and adjust as necessary.			
4.2.6	Ensure special precautions are taken when extraordinary hazards exist.			
4.2.7	Maintain appropriate operational tempo			
4.2.8	Monitor and display location, status, and assignment of resources.			
4.2.9	Supervise assigned people and resources and adapt to changes as necessary			
4.2.10	Conduct periodic after action reviews, safety stand-downs and other meetings with tactical supervisors or assigned resources.			

Observation Notes

1	Date	Event	Evaluator	Signature

Summary of Evaluation for Competency 4

1	Date	Event	Evaluator	Signature

Competency 5: Lead Operations

Intent

Task

Lead the operations effort to meet leader's intent, adapting the form and function of the operations section, as needed.

Purpose

To ensure that the size and configuration of the operations section and the actions of operators and support staff appropriately balance safety, effectiveness and efficiency to accomplish the leader's intent throughout the operational period.

End State

The operations section has done everything prudent to achieve the end state of the incident objectives.

Success Conditions

- Communicated accurate, relevant, timely, and complete information up, down and laterally throughout the incident organization.
- Communicated or clarified intent for continuing operations when needed.
- Used leadership styles appropriate to diverse situations.
- Displayed and encouraged flexibility, adaptability, and disciplined initiative to meet leader's overall intent.
- Continually incorporated feedback to refine and improve plans.
- Anticipated incident behavior and operations across space and time. Applied principles of action appropriately.
- Maintained appropriate span of control.
- Maintained appropriate operational tempo and rhythm, managed fatigue effectively.
- Shifted between the tactical and strategic perspectives of the incident, as appropriate.

Task 5.1: Conduct Operations Briefing

	Sub-task	Date	Evaluator	Signature
5.1.1	Participate in the operational period briefing, emphasizing tactical priorities and any special health and safety considerations as well as changes in the written IAP.			
5.1.2	Brief tactical supervisors on overall situation, task organization, containment features, boundaries, and assignments.			
5.1.3	Communicate appropriate intent (task, purpose and end state) to tactical supervisors to enable tactical execution and exercise their initiative and judgment to adapt to the situation, as appropriate.			
5.1.4	Communicate hazards, acceptable risk, rules of engagement, and safety requirements to each tactical supervisor for their area of responsibility.			
5.1.5	Communicate support plan and ordering process for each Division/Group.			
5.1.6	Specify facilities and reporting locations.			
5.1.7	Facilitate questions and answers at appropriate times in briefings and breakouts.			

Observation Notes

	Date	Event	Evaluator	Signature
1				

Task 5.2: Reinforce the Common Operating Picture (COP)

Sub-task	Date	Evaluator	Signature
5.2.1			
5.2.2			
5.2.3			
5.2.4			
5.2.5			
5.2.6			
5.2.7			
5.2.8			
5.2.9			
5.2.10			
5.2.11			
5.2.12			
5.2.13			
5.2.14			

5.2.15	Keep Logistics up-to-date on immediate and long-range requirements.
5.2.16	Assist Information and Liaison Officers in communicating incident status, strategic and tactical plans, and management intent during public and stakeholder meetings.
5.2.17	Inform Situation Unit on Division breaks, drop points, current perimeter of hazard (fire, flood, etc), environmental impact, etc.

Observation Notes

	Date	Event	Evaluator	Signature
1				

Task 5.3: Supervise Ongoing Operations

Sub-task	Date	Evaluator	Signature
5.3.1	Coordinate with appropriate local response agencies (fire, EMS, law enforcement, EOCs, public health, public works, etc.) and relevant stakeholders (utility companies, Red Cross, public officials, etc.).		
5.3.2	Validate priorities, intent, strategies and refine or change tactics, as appropriate.		
5.3.3	Hold Section meetings, as necessary, to ensure communication and coordination among Branches, Divisions, and Groups		
5.3.4	Develop contingency plans for the critical strategies essential to the success of the mission.		
5.3.5	Apply appropriate principles of action (unity of effort, offense, safety, speed, focus, positioning, reserves) to adapt to changes to maintain the initiative.		
5.3.6	Establish trigger points to mitigate known risks, identify emerging risks, or synchronize operations after a plan has been implemented.		
5.3.7	Develop and communicate courses of action for circumstances in which the original plan becomes impractical or unfeasible.		
5.3.8	Authorize others to implement contingency plans and actions upon reaching specified trigger points.		
5.3.9	Coordinate as needed when the situation changes significantly to ensure roles and responsibilities are adapted accordingly.		
5.3.10	Regularly debrief subordinate branches, divisions, and groups and obtain feedback on safety and effectiveness of past or ongoing operations.		

Observation Notes

1	Date	Event	Evaluator	Signature

Summary of Evaluation for Competency 5

1	Date	Event	Evaluator	Signature

Competency 6: Demobilize Section

Intent

Task

Develop a plan for resource replacement if necessary as well as the orderly demobilization of the section consistent with leader's intent.

Purpose

As the needs of the incident lessen, to release resources so that they can be efficiently redeployed to other incidents or returned to their home units for rest and rehabilitation.

End State

Operations section has been efficiently demobilized.

Success Conditions

- Ensured relevant information was exchanged during briefings and debriefings
- Proactively disseminated relevant information to incoming OSC.
- Kept aware of team status and situation of section members.
- Encouraged others to ask questions and provide feedback to promote current situation awareness.
- Communicated effectively and established a foundation that built trust with incoming replacements and host agency.
- Showed respect for incoming team and established a positive relationship with incoming counterparts.
- Briefed situation awareness with a logical, macro to micro approach. Communicated the big picture and priorities of values-at-risk before focusing on tactical details.
- Debriefed formally and informally to capture lessons and improve section and team processes.

Task 6.1: Support planning for demobilization of section

	Sub-task	Date	Evaluator	Signature
6.1.1	Plan for demobilization.			
6.1.2	Brief the incoming Operations Section Chief.			
6.1.3	Coordinate the development and approval of transfer of duties when incident escalates/deescalates.			
6.1.4	Conduct assessment of resource needs and timeline to develop glide path for planned demobilization of excess resources.			
6.1.5	Provide Planning Section Chief a current list of excess personnel, contract equipment, crews, miscellaneous personnel and other resources.			
6.1.6	Determine time of transfer with replacement.			
6.1.7	Coordinate demobilization with section team members.			

Observation Notes

1	Date	Event	Evaluator	Signature

Task 6.2: Implement demobilization of section

	Sub-task	Date	Evaluator	Signature
6.2.1	Contribute to implementation of Incident Demobilization Plan.			
6.2.2	Coordinate with the replacement Operations Section Chief.			
6.2.3	Communicate transfer of duties to assigned resources and command staff.			
6.2.4	As necessary, coordinate with agencies about transfer of command back to local jurisdiction.			
6.2.5	Transfer position duties while ensuring continuity of authority and situation awareness, account for changes in incident complexity.			

6.2.6 Ensure demobilization procedures are followed.

Observation Notes

1	Date	Event	Evaluator	Signature

Task 6.3: Close-out of Operations Section

	Sub-task	Date	Evaluator	Signature
6.3.1	Ensure documentation is complete and disposition is appropriate			
6.3.2	Provide strengths to sustain and areas of improvement regarding the Operations Section and its internal and external relations.			
6.3.3	Participate in Post Incident, as necessary.			
6.3.4	Participate in after-incident review per agency/organization policy.			
6.3.5	Provide a complete, accurate final Operations package.			

Observation Notes

1	Date	Event	Evaluator	Signature

Summary of Evaluation for Competency 6

1	Date	Event	Evaluator	Signature

Position Evaluation Summary

Trainee Evaluation Opportunity Log

Type of Evaluation Event	Type and Complexity	Name of Event	Date	Evaluator

Log of Evaluators

Evaluator 1

Name	
Evaluation Event	
Date of Event	
Operational periods observed	
Phone	
E-mail	
Agency	
Home unit	
Position	
Qualifications	

This would be repeated for 4 different evaluators

Position Evaluation Summary Notes

1	Date	Event	Evaluator

This is a summary of the trainee's overall performance to include recommendations for further development for the entire incident or other evaluated event. There would be space for 4 of these summaries.

Recommendation for Approval

Date	Evaluator	Evaluator