Planning "P"
Meetings and Briefings
Cheat Sheets

These were put together with the Planning Section Chief in mind and should be used as "Cheat Sheets" for the various Meetings and Briefings in the Planning "P"

It is suggested the Planning Section Chief print these out and laminate them. This way they can make notes on each using dry erase markers or a grease pencil to keep on track during the meetings and briefings.

Some pages are left blank intentionally to allow for meeting/briefing continuity.

Mark Boddy

MEETING GROUND RULES

1. Silence Phones, Radios, and Pagers (UNLESS IT INVOLVES LIFE SAFETY)
2. No text messages or E-mail (UNLESS IT INVOLVES LIFE SAFETY)
3. No sidebar conversations
4. Stick to the agenda
5. Presenters in Front (have them stand in line in the front in order of the agenda)
6. Hold Questions, Comments, & Concerns until after the meeting (except for C&G meetings)
7. Maintain Covid Protocol

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Initial Unified Command Meeting

Agenda	
Speaker	**Topic**
Unified Command	- Bring meeting to order. - Cover ground rules. - Follow the agenda. - Introductions - Review jurisdictional/agency priorities, mission, and response objectives. - Review jurisdictional limitations, concerns, response priorities, and restrictions. - Agree on incident organizational structure and facilities. - Designate the individual most qualified to be the Operations Section Chief. - Agree on General Staff Personnel Designations. - Discuss unique planning, logistical, or finance agreements and procedures. - Agree on resource ordering process to be followed. - Agree on cost-sharing procedures. - Agree on incident information release procedures (within delegation). - Agree on a process for the management of sensitive or classified information and intelligence. - If necessary, designate one of the UCs to be the spokesperson for/represent the UC.

Unified Command Objectives Meeting

aka Initial Strategy Meeting

Agenda	
Speaker	**Topic**
PSC	• Bring meeting to order. • Cover ground rules. • Follow the agenda.
IC/UC	• Identify Incident Priorities. • Identify and discuss Incident Objectives. • Establish Incident Operational Period.
PSC (all)	• Establish meeting schedule to match All-Hazards Planning Cycle. • Open Discussion: Priorities, Objectives, strategies, and issues/concerns.
IC/UC	• Describe resource ordering procedures. • Describe information release procedure. • Assign any incomplete tasks.
PSC	• Close meeting.

Wall Charts:

- Ground Rules
- Agenda
- Blank Sheet for Incident Objectives
- ICS 230 or Blank Sheet for Meeting Schedule

Attendees:

- Incident Commander / Unified Command
- Planning Section Chief
- Operations Section Chief Optional (*helpful* but not required)

Meeting Schedule

_____ Initial Strategy Meeting

_____ 1st C & G Meeting

_____ Tactics Meeting

_____ 2nd C & G Meeting (if needed)

_____ Planning Meeting

_____ Operational Period Briefing

_____ IC/UC Validate/Adjust Objectives

_____ Closeout Meeting

Command and General Staff Meeting

Agenda	
Speaker	**Topic**
PSC	- Bring meeting to order. - Cover ground rules. - Goes around the room asking each C&G member if they have any comments/concerns
IC/UC	Provides comments and presents information about the incident to C&G Staff.
PSC	Closes meeting.

Wall Charts:

- Ground Rules
- Agenda
- Incident Objectives
- Meeting Schedule
- Blank Sheet for notes

Attendees:

- Incident Commander / Unified Command
- Command Staff
- General Staff

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Tactics Meeting

Agenda	
Speaker	**Topic**
OSC	- Discuss current operations and completed actions and strategies. - Outline the proposed section organization. - Outline specific tasks and present the draft ICS 215 Operational Planning Worksheet ICS. - Identify the resources required for the draft ICS 215. - Identify any additional logistical needs.
PSC/Resources Unit Leader (RESL)	Present resource status.
SOF	- Identify hazards/risks and mitigations - Present ICS 215A Incident Action Plan Safety Analysis.
LSC	- Contribute logistics information (facilities). - Determine support requirements based on the ICS 215
OSC	- Request Consensus for the Draft Tactical Plan. - Closes Meeting.

Wall Charts:
- Ground Rules
- Agenda
- ICS 215
- ICS 204(s)
- ICS 215A
- Blank sheet for notes

Attendees:
- OSC
- RESL (or PSC if none)
- SOFR
- LSC

Note: IC/UC does NOT attend this meeting!

Planning Meeting

Planning Meeting Agenda	
Speaker	**Topic**
PSC	**Introduction** Brings meeting to order, covers ground rules, and refers to agenda.
OSC	**Update on Operations** Provides update on current operations and situation status.
PSC	**Incident Objectives and Priorities Review** Presents the Incident Objectives to the group.
IC/UC	**Verification of Objectives** Verifies that Objectives and priorities are still valid and achievable.
SITL (and any needed technical specialists)	**Weather and Projections** Provides briefing on projected meteorological, plume modeling, ocean currents, structural stability, seismic, or other projections that could affect incident situation during next Operational Period(s).
OSC	**Proposed Operations Plan** Provides overview of the proposed Operations Section organization, strategy, and Operational Period emphasis and then, typically using the wall-sized ICS 215 Operational Planning Worksheet, provides details of tactical work assignments, resource requirements, management positions, specialized equipment, and needed support facilities (e.g., Staging Areas) required to execute proposed plan.
SOF	**Mitigation Measures/Safety Plan** Using wall-sized ICS 215A Incident Action Plan Safety Analysis, discusses hazards/risks and measures employed to mitigate and manage risks presented by the Operations Plan and incident situation.
LSC	**Communications, Medical, Supply Approval** Validates that Communications, Medical, Transportation, and Supply Units concur with and can support the proposed plan.
FSC	**Information Sharing** Indicates fiscal constraints and verifies that proposed plan fits within financial constraints.
PIO	**Information Sharing**

	Provides public information plan and methodologies to meet objectives. Verifies that public information outreach meets objectives.
LOFR	**Information Sharing** Confirms that interagency issues are being addressed.
PSC	**Final Confirmation and Support** Polls Command and General Staff members to solicit their final input and commitment to the proposed plan.
IC/UC	**Approval of the Plan** Provides approval as presented and committed to by Command and General Staff members.
IC/UC	**Closing Comments** Provides any final or closing comments.
PSC	**PSC Assignments and Deadlines** Issues assignments and deadlines to appropriate IMT members for developing Incident Action Plan (IAP) components and support documentation.
PSC	**Meeting/Briefing Reminder** Reminds participants of upcoming schedule and adjourns meeting.

Wall Charts:
- Ground Rules
- Agenda
- Map
- Incident Objectives
- ICS 215
- ICS 215A
- Deadline for IAP Docs
- Meeting Schedule

Attendees:
- IC/UC
- All Command & General Staff
- Other staff by Invitation
- VIP's
- Assisting/Cooperating Agencies
- Responsible Parties
- Stakeholders

Incident Action Plan Checklist

IAP Component	Checklist Items
Cover Sheet	☐ Incident name ☐ Operational Period ☐ Date
* ICS Form 202, *Incident Objectives*	☐ Are Incident Objectives **SMART** - Specific, Measurable, Action-Oriented, and Time-Sensitive? ☐ General Safety Message? ☐ Is Command Emphasis included? ☐ Weather? ☐ Approved/Prepared block completed? ☐ IAP components checked off?
* ICS Form 203, *Organization Assignment List*	☐ Does ICS Form 203 match ICS Form 204s? ☐ Is the form complete, including header and footer?
* ICS Form 204, *Assignment List*	☐ Complete? ☐ Do the listed resources match the resources on the ICS 215? ☐ Are assignments clear? ☐ Precise? ☐ Are there Pickup Point, Dropoff Point, or Special Instructions? ☐ Communication Summary matches ICS Form 205? ☐ Prepared by completed? ☐ Are the ICS 204s in the same sequence as listed on the ICS 203?
* ICS Form 205, *Incident Radio Communications Plan*	☐ Are the functions on the ICS 205 listed as one of the following: Command, Tactical, Air-to-Air, Air-to-Ground, Support ☐ Match frequencies given/coordinated? ☐ Do the terms used in the Assignment column match the ICS 215? ☐ Prepared block completed?

IAP Component	Checklist Items
* ICS Form 206, *Medical Plan*	☐ Emergency procedures clear? ☐ Hospitals Information? ☐ Ambulance services and Resources? ☐ Prepared by block completed ☐ Reviewed by completed?
* Incident Map	☐ Clear, legible? ☐ Appropriate symbols? ☐ Legend? ☐ Does it match the assignments on ICS Form 204? ☐ Does it contain **STAND** (Scale, Title, Author, North Arrow, and Date/Time)?
Traffic Map	☐ Clear, legible? ☐ Does it contain **STAND**? ☐ Appropriate ICS symbols? ☐ Legend?
* ICS Form 208 *Safety Message*	☐ Is there a separate Safety Message? ☐ Header Information? ☐ Is the message clear, concise, and complete? ☐ Signed?
Liaison Officer Issues	☐ Contact list? ☐ Contact information?
Other Potential Components	☐ Pending Demobilization List? ☐ General vicinity map? ☐ Contingency Plan? ☐ Base Map? ☐ Security Message? ☐ Blank ICS 214 Activity Log?

IAP Component	Checklist Items
Items to check throughout the IAP	☐ Are the Date and Operational Period correct? ☐ Is the Incident Name correct? ☐ Are all pages numbered and oriented correctly? ☐ Is each form preparer identified with Name, Position/Title, and signature? ☐ Is the Date/Time completed noted on each ICS form?

* Indicates Mandatory

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Operational Period Briefing

Agenda	
Speaker	**Topic**
PSC	**Introduction** Brings briefing to order, covers ground rules, and refers to agenda.
OSC (who is currently supervising)	**Update on Operations** Provides update on current operations and situation status.
PSC	**Incident Objectives** Refers personnel to the Incident Objectives and priorities on the ICS 202 Incident Objectives.
PSC	**Organization (ICS 203)** Refers personnel to ICS 203 Organization Assignment List.
SITL (and any needed Technical Specialists)	**Weather and Projections** Provides briefing on projected meteorological, plume modeling, ocean currents, structural stability, seismic, or other projections that could affect incident/event situation during next Operational Period.
OSC (who will be supervising)	**Operations Plan** Provides overview of the strategy and Operational Period emphasis, and then, referring to each individual ICS 204 Assignment List, quickly performs a roll call (when practical present tactical work assignments, specialized equipment, and special instructions).
SOF	**Mitigation Measures/Safety Plan** Refers to the ICS 208 Safety Message/Plan highlighting hazards/risks, and mitigation measures that should be discussed with subordinates.
LSC or COML	**Communications** Refers personnel to the ICS 205 Incident Radio Communications Plan and ICS 205A Communications List and highlights plan and updates.
LSC or MEDL	**Medical Plan** Refers personnel to the ICS 206 Medical Plan and highlights information/updates and procedures used to access medical care for injured responders.
LSC	**Logistical Concerns** If needed, provides information on accessing available logistical infrastructure.
FSC	**Financial Concerns** If needed, highlights needed information, concerns, or important points.
PIO	**Public Information Concerns** If needed, provides public information/outreach plan and information regarding upcoming public meetings and media briefings.
LOFR	**Liaison Concerns**

Agenda	
Speaker	**Topic**
	If needed, highlights needed information or concerns.
As Needed*	**Additional Presentations**
	If required, keeping in mind time limitations.
IC/UC	**Closing Comments**
	Provides any final or closing comments.
PSC	**PSC Adjournment**
	Identifies (points to locations or areas) and announces Division/Group Breakout locations; them adjourns the Operational Period Briefing.

* If required, additional personnel may provide presentations during the Operations Briefing to assist the Operations Section Chief in properly briefing the personnel performing the tactical work assignments.

Wall Charts:
- Ground Rules
- Agenda
- Map
- Incident Objectives
ICS 207 (or 203 in a pinch)
- ICS 215A
- ICS 208

Attendees:
- IC/UC
- All Command & General Staff
- Other staff by Invitation
- All participants in a supervisor role & invited guests
- Assisting/Cooperating Agencies
- Responsible Parties
- Stakeholders