NATIONAL QUALIFICATION SYSTEM (NQS)

POSITION TASK BOOK
FOR THE POSITION OF

PLANNING SUPPORT SPECIALIST

Version: March 2024

Check the appropriate position type:

☐ Single Type   *(All WVEMD SEOC positions are Single Type)*

POSITION TASK BOOK ASSIGNED TO:
TRAINEE'S NAME:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
POSITION TASK BOOK INITIATED BY:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
POSITION TASK BOOK WAS INITIATED:
LOCATION:
DATE:

Required Training

The following courses are required for full PTB completion:

CATEGORY	CODE	TITLE
General	IS-100	Introduction to the Incident Command System
	IS-200	Basic Incident Command System for Initial Response
	IS-700	An Introduction to the National Incident Management System
	IS-800	National Response Framework, An Introduction
Professional Development Series	IS-120	An Introduction to Exercises
	IS-230	Fundamentals of Emergency Management
	IS-235	Emergency Planning
	IS-240	Leadership and Influence
	IS-241	Decision Making and Problem Solving
	IS-242	Effective Communication
	IS-244	Developing and Managing Volunteers
Advanced ICS	G-0191	Emergency Operations Center/ICS Interface
	IS-2200	Basic Emergency Operations Center Functions

Recommended Training

The following courses are **not** required for full PTB completion, but are recommended to enhance your understanding of this position:

CATEGORY	CODE	TITLE
Advanced ICS	ICS 300	Intermediate ICS for Expanding Incidents
	ICS 400	Advanced ICS
Position Specific	E/L 962	NIMS ICS All-Hazards Position Specific, Planning Section Chief

Task Completion Codes
- (C) – Task performed in a classroom or training setting.
- (E) – Task performed during full-scale exercise.
- (F) – Task performed during a functional exercise.
- (T) – Task performed during a tabletop exercise.
- (I) – Task performed during a real-life incident or event.
- (J) – Task performed during day-to-day job duties.
- (A) – Task may be endorsed at any time.

Task Category: **Perform action tracking**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Collect and track open tasks, issues and action items through resolution.	E, F, I		
2. Communicate about tasks, issues, and action items horizontally and vertically as necessary to create awareness and ensure completion.	E, F, I		

Task Category: **Complete common coordination and accountability tasks associated with all positions within the EOC**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Demonstrate understanding of EOC activation and operations, including how your function relates to other incident support activities: ● Demonstrate general awareness of local risks and hazards	C, E, F, I, T		
4. Maintain positive, calm demeanor to promote a positive work environment.	E, F, I		
5. Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.	E, F, I, J		
6. Comply with relevant health and safety requirements.	E, F, I		
7. Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.	C, E, F, I, T		
8. Participate in the EOC planning process.	E, F, I		
9. Participate in appropriate EOC meetings and briefings related to your assigned function.	E, F, I		

	CODE		
10. Follow general internal and external information flow processes: ● Demonstrate knowledge of information management systems, such as incident management software	E, F, I		
11. Manage essential elements of information and critical information requests in accordance with processes and procedures: ● Follow EOC approval authorities ● Properly handle Personally Identifiable Information (PII) and sensitive information ● Provide proper documentation for record-keeping and accountability ● Provide information for reports and leadership decisions	E, F, I		
12. Practice proper knowledge management processes and procedures: ● File structures ● Naming conventions ● Archiving processes ● Position logs	E, F, I		
13. Follow processes for resource requests, prioritization, deployment, tracking, reassignment, and demobilization.	E, F, I		
14. Participate in orderly transition of resources and processes from response to recovery.	E, F, I		
15. Transfer responsibilities upon completion of assignment: ● Transfer to replacement, recovery personnel, or other responsible party ● If necessary, shift responsibilities to a non-disaster/day-to-day job	E, F, I		
16. Participate in EOC training and exercises.	E, F		
17. Participate in after action review and improvement planning.	E, F, I, T		

Task Category: Collect and store documents and records

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
18. Follow document and records management procedures and policies.	E, F, I		
19. Brief EOC personnel on document management processes and related staff responsibilities.	E, F, I		
20. Monitor, review, and assess activity logs, charts, and records for completeness and follow up on any that are incomplete.	E, F, I		
21. Collect and package information for after action review.	E, F, I		

Task Category: Provide documents and records upon request

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
22. Monitor compliance with information management processes and procedures.	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
23. Perform real-time documentation collection and storage.	E, F, I		
24. Archive documents such as activity logs, charts, and records.	E, F, I		
25. Respond to internal requests for archived information, such as: ● Lessons learned from past disasters, incidents, and events ● Previous incident information	E, F, I		

Task Category: Reference pre-incident plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
26. Gather relevant pre-incident plans, best practices, lessons learned, etc. from internal and external sources: ● Obtain additional plans from stakeholders and partners	E, F, I, J		
27. Obtain additional plans or supporting documents, such as annexes and standard operating procedures, as necessary.	E, F, I		
28. Identify areas where EOC personnel may need to develop plans or supporting documents.	E, F, I		

Task Category: Develop and write EOC action plans and other incident-specific plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
29. Demonstrate knowledge of the EOC planning process: ● Iterative action plan development ● Development of other incident-specific plans	E, F, I, T		
30. Facilitate the development of objectives and/or strategies to achieve desired outcomes: ● Ensure integration of incident command objectives, priorities, and senior leadership guidance into EOC planning	E, F, I		
31. Facilitate the assessment and revision of objectives and/or strategies to ensure that they align with desired outcomes.	E, F, I		
32. Establish communication with stakeholders to facilitate planning and problem-solving: ● Understand and address stakeholder expectations ● Incorporate nontraditional planning partners as necessary	E, F, I		
33. Write or review incident-specific plans: ● With direction from EOC leadership, lead and implement the EOC planning process ● Use appropriate formats, graphics, and maps ● Oversee production of other incident-specific plans	E, F, I		
34. Demonstrate knowledge of operational planning and continuity planning: ● Develop plans to address specific situations or needs	E, F, I, J, T		
35. Seek and obtain approval for incident-specific plans.	E, F, I		
36. Monitor implementation of plans and adjust as necessary.	E, F, I		

Task Category: Disseminate plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
37. Provide plans to internal and external stakeholders for implementation and awareness.	E, F, I		
38. Ensure that stakeholders are familiar with the contents, roles, responsibilities, and timelines of relevant plans.	E, F, I		

Task Category: Facilitate the ongoing planning process

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
39. Implement EOC operational rhythm, as approved by EOC leadership: ● Coordinate the EOC planning cycle with field, Joint Information Center (JIC), Joint Information System (JIS), and other incident operations, as necessary ● Communicate operational rhythm	E, F, I		
40. Ensure integration of incident management officials, including on-scene incident and JIC/JIS personnel, into the EOC planning process.	E, F, I		

Task Category: Administer financial management for jurisdictional expenditures

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

41. Demonstrate knowledge of jurisdictional/organizational procurement policies:
● Standard operations
● Emergency operations
● Cost-tracking processes and requirements:
  ○ Preapproved vendors
  ○ On-call contracts
	E, F, I, J		

42. Demonstrate awareness of fiscal implications and requirements when: ● Requesting or activating resources ● Operating under various types of emergency or disaster declarations ● Receiving external, Federal, or state assistance ● Using volunteer resources	E, F, I, J, T		
43. Ensure policies and procedures are in place to comply with applicable reimbursement requirements.	E, F, I, J		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
44. Seek information on the financial requirements of incoming resources, such as: ● National Guard assets ● Mutual aid resources	E, F, I		
45. Demonstrate knowledge of jurisdictional fiscal management, operations, processes, procedures, thresholds, and constraints.	E, F, I, J		
46. Establish and communicate protocol to track and maintain incident-related financial documentation, such as invoices, payroll logs, and contracts.	E, F, I		
47. Collect, track, and document data related to funding and expenses: ● Monitor compensation processes for time and pay ● Coordinate with risk management on costs involved in workers' compensation claims, damage claims, tort claims, and other incident-related claims ● Implement plan to coordinate and manage monetary donations ● Coordinate, collect, and track volunteer time and maintain documentation for potential reimbursement requests ● Identify and follow any use limitations for various funding sources ● Maintain awareness of FEMA financial guidance, including standard equipment rates, labor categories, preexisting contracts, indirect costs, fringe benefits, and established vendor lists ● Identify and organize data relevant to grant or reimbursement applications	E, F, I, J		
48. Coordinate with organizational representatives to identify additional discipline-specific funding sources.	E, F, I, J		
49. Monitor and verify costs and expenditures by reviewing requests, invoices, time cards, activity logs, and other available documentation or resources: ● Track jurisdictional burn rate	E, F, I		

Task Category: Advise EOC leadership and staff on financial matters associated with jurisdictional activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
50. Review resource requests with resource management personnel to verify understanding of request and provide input on course of action: ● Suggest cost-efficient alternatives to obtaining requested resources, as appropriate	E, F, I		
51. Coordinate with resource management personnel, legal personnel, and EOC leadership to execute contracts, Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), and purchases.	E, F, I		
52. Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.	E, F, I		
53. Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.	E, F, I		

Task Category: Collect and analyze information regarding EOC activation and activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
54. Demonstrate knowledge of the after action review and improvement planning process, including the types of information gathered and the feedback process.	E, F, I, J, T		
55. Collect, store, and analyze data for the after action review and improvement plan.	E, F, I		
56. Perform real-time data collection during response: ● Use accepted tools, such as EOC activity logs	E, F, I		
57. Provide guidance to EOC leadership on collecting performance improvement-related data.	E, F, I		

Task Category: Suggest process improvements and solutions during EOC operations

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
58. Identify best practices and areas for improvement during EOC activation, operation, and deactivation, and suggest process improvement measures to EOC staff and leadership.	E, F, I		
59. Provide recommendations to leadership for approval and dissemination.	E, F, I, J		

Task Category: Support process improvement following EOC deactivation

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
60. Develop an after action review and improvement planning schedule for the EOC activation that is consistent with Homeland Security Exercise and Evaluation Program (HSEEP) or similar guidance.	E, F, I		
61. Coordinate after action review-related meetings to identify and clarify areas for improvement: ● Support facilitation of meetings as necessary	E, F, I, J		
62. Identify best practices and areas for improvement.	E, F, I, J		
63. Develop recommendations to address areas for improvement.	E, F, I, J		
64. Coordinate EOC after-action report development efforts with other incident-related after-action reporting efforts.	E, F, I		