
Unit 7: The Planning Process

INSTRUCTOR GUIDE

Objectives

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

- Describe how the Liaison Officer fits into the planning process
- Describe the components of the planning cycle
- Describe the responsibilities of the Liaison Officer in the ICS planning process

Methodology

This unit uses lecture and discussion.

Content from this unit will be generally tested through discussion and the Final Exam, as the unit is meant to serve as an overview of the Liaison Officer's role and responsibilities regarding incident communications and work location. Specific responsibilities and duties of the position will be further covered and evaluated in-depth in subsequent unit presentations and the Final Exam.

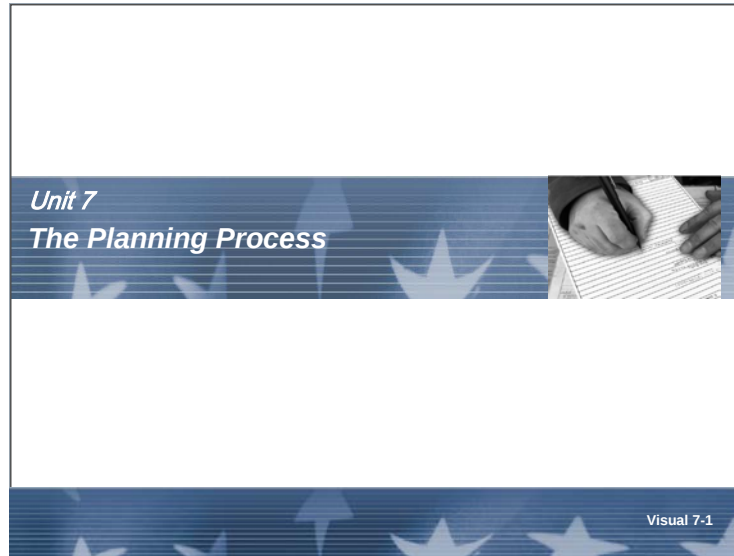
Time Plan

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.

Topic	Time
Lesson	30 minutes
Total Time	30 minutes

Reference Materials

- Projector and other equipment as necessary for PowerPoint presentation
- Easel Pads
- Marking pens
- Blank ICS Form 211
- Blank ICS Forms 214 for the entire class
- All Hazards Liaison Officer Position Task Book (PTB)
- ICS 420-1 Field Operations Guide (FOG)
 - The FOG is optional and available from FIREScope
- Handout 7-1: Planning P

**Explain the Following Key Points**

Announce unit and quickly move to next slide.

Unit Terminal Objective

Know how the Liaison Officer fits into the planning process



Unit 7:
Planning Process

Visual 7-2

Explain the Following Key Points

Introduce the unit objectives.

Explain the Unit Terminal Objective to the class. Remind students that the Final Exam questions are based on the Unit Enabling Objectives, which are in the Student Guide.

Unit Terminal Objective

Describe how the Liaison Officer fits into the planning process.

Unit Enabling Objective

Describe the components of the planning cycle

Describe the responsibilities of the Liaison Officer in the ICS planning process

Topic

Liaison Officer Role in Incident Planning

Liaison Officer Role in Incident Planning

- Plays a critical role in coordinating the use of resources from Assisting Agencies
- Ensures Agency Representatives are available and provide required information in a timely manner
- Ensures problems are resolved and opportunities are identified prior to the Planning Meeting

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Visual 7-3

Explain the Following Key Points

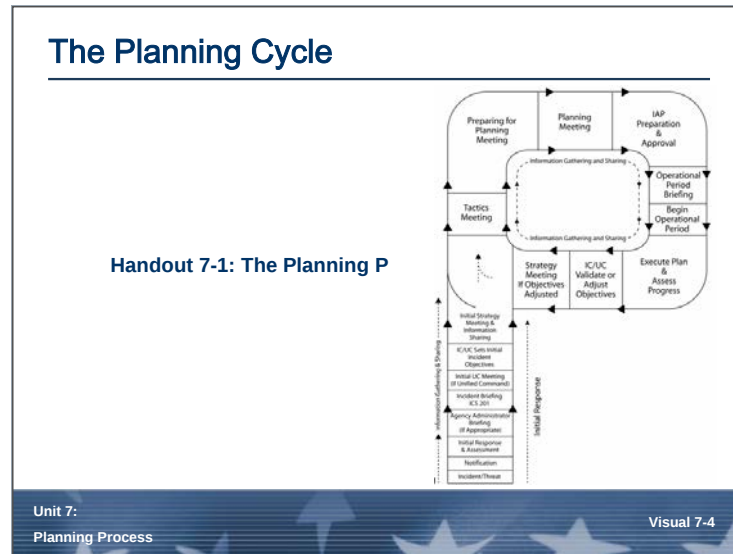
Provide a basic overview of the Liaison Officer's involvement in incident planning. Keep in mind the following things that characterize typical incidents.

Coordinating Agency Representatives and resources is a continuous process. In many incidents, there are 1,000 moving pieces, and there is little or no stability. New people arrive every day and don't necessarily know what happened or was decided in the days prior.

As discussed before, AREPs may be unfamiliar with ICS. As with other areas of incident response, help the AREP understand the planning process and provide guidance whenever you can. As the AREP's knowledge matures, the Liaison Officer can give him or her more latitude.

Liaison Officers ensure AREPs are available and that problems are resolved and opportunities are identified prior to the Planning Meeting by constant communication. As you learned in prior units, you should talk to the AREPs as often as possible, and keep tabs on where they are and how to contact them.

The ICS Planning Process is the heart and soul of an incident response and mitigates the concerns listed above. It makes order out of chaos.



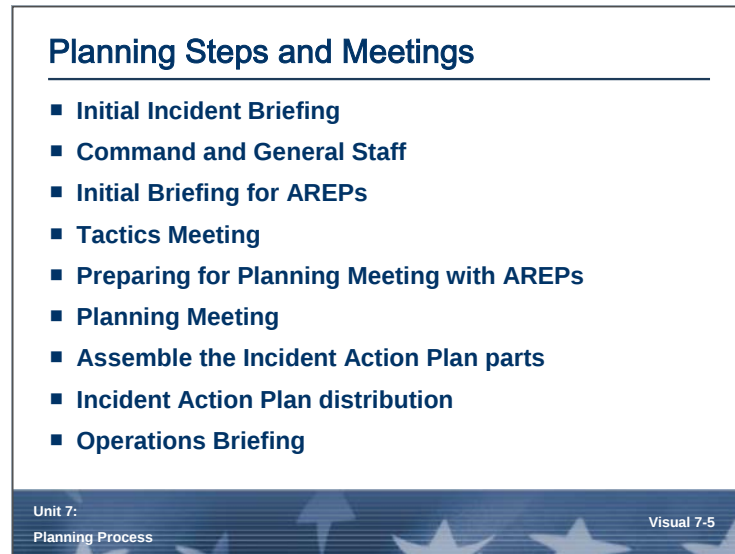
Explain the Following Key Points

Refer to the full-size Handout 7-1 Planning P. Explain the basics of the Planning P. Note that the steps in the P must be accomplished in order for the Incident Action Plan (IAP) to get out.

AREPs may be completely unfamiliar with the Planning P, so it is necessary that Liaison Officers provide AREPs with a general understanding of the process. Often on an incident, someone will post the Planning P and actually write on it times for when the steps will happen, when they need to happen, or when information is expected. The things in the P must happen in that order to get the IAP out.

Try to limit conference calls—they can be very time consuming and sometimes unproductive. Try for face-to-face meetings whenever possible.

Topic Planning Steps and Meetings

**Explain the Following Key Points**

This is an overview of the steps in the process. Do not go into great detail on this slide as the specifics of each stage in the planning process are covered in subsequent slides.

Suggested Discussion Question

Which meetings should Liaison Officers attend?

Answers

Direct students to mark the correct answers in their notes. The correct answers are:

- Initial Incident Briefing
- Command and General Staff*
- Initial Briefing for AREPs
- Tactics Meeting
- Preparing for Planning Meeting with AREPs
- Planning Meeting
- Assemble the IAP parts
- IAP distribution
- Operations Briefing

* Meeting attendance is mandatory for Liaison Officer

Generally, AREPs are expected to be at the Planning Meeting, but only as listeners, and to comment only on issues affecting the resources of their agency or safety issues.

Ask the class for an example of an AREP that would be involved in the train derailment incident, then, together, walk the Liaison Officer and that AREP through the steps in the Planning P.

Role of the Liaison Officer

- Initial Incident Briefing
 - Gathers information on Assisting and Cooperating Agencies that are or will be on the incident
- Command and General Staff Meetings
 - Provides information to the IMT concerning important issues with other agencies
- Initial Briefing for AREPs
 - Provides information regarding required information for the planning process

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Visual 7-6

Explain the Following Key Points

Explain the role of the Liaison Officer in these initial steps of the planning process:

- Initial Incident Briefing
 - This may be the time when the Liaison Officer realizes the need for assistants
 - Gathers information on assisting and cooperating agencies that are or will be on the incident
- Command and General Staff Meetings
 - Stakeholder issues might come up at this juncture
 - This is also the point where the determined relationship between IC, Liaison Officer, and Public Information Officer will be made clear
 - Provides information to the IMT concerning important issues with other agencies
- Initial Briefing for AREPs
 - Provides information regarding required information for the planning process

A presentation slide titled "Role of the Liaison Officer (cont.)" with a blue header and footer. The slide lists three main bullet points: "Tactics Meeting", "Preparing for the Planning Meeting", and "Planning Meeting". Each has sub-bullets. The footer contains "Unit 7: Planning Process" and "Visual 7-7".

Role of the Liaison Officer (cont.)

- **Tactics Meeting**
 - If requested to attend by the OSC, provides information on the capabilities and limitations of resources to accomplish proposed tactics
- **Preparing for the Planning Meeting**
 - Ensures Agency Representatives can support the proposed assignments of their resources
- **Planning Meeting**
 - Attends the meeting and coordinates interaction with the AREPS

Unit 7: Planning Process Visual 7-7

Explain the Following Key Points

Continue discussion of the role of the Liaison Officer in the steps of the planning process.

Tactics Meeting

If requested to attend by the Operations Section Chief (OSC), The Liaison Officer provides information on the capabilities and limitations of resources to accomplish proposed tactics.

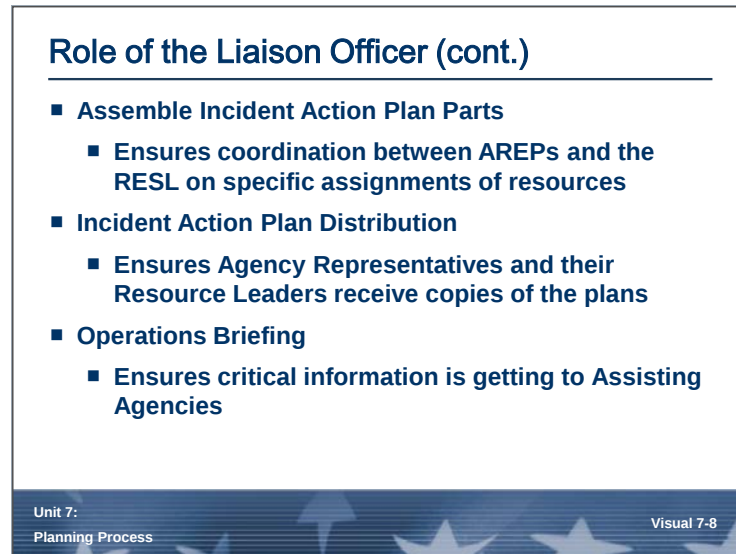
In the firefighting discipline, the Operations Meeting was kept small, but during Hurricane Katrina and some other incidents, the meeting has been very large. The Operations Section has to keep track of an enormous amount of detail, and with lots of people around, things can take a long time and be hard to keep track of. Meeting discipline is critical, so the Liaison Officer shouldn't barge into it unless they're asked to or really need to be there.

Preparing for the Planning Meeting

The Liaison Officers ensure AREPs can support the proposed assignments of their resources. Once the Liaison Officer has a good sense of what the plan is for the resources, they can work with the AREP to make sure they can support this.

Planning Meeting

The Liaison Officer attends the meeting and coordinates interaction with the AREPs. It may require, prior to the meeting, letting the AREPs know the rules. The meeting is approximately 30 minutes, and is not time to chat or complain. The role of the AREP is limited, and generally they should just be an observer unless it directly relates to their resources or a safety issue.



Role of the Liaison Officer (cont.)

- **Assemble Incident Action Plan Parts**
 - Ensures coordination between AREPs and the RESL on specific assignments of resources
- **Incident Action Plan Distribution**
 - Ensures Agency Representatives and their Resource Leaders receive copies of the plans
- **Operations Briefing**
 - Ensures critical information is getting to Assisting Agencies

Unit 7: Planning Process Visual 7-8

Explain the Following Key Points

Continue discussing the role of the Liaison Officer in the steps of the planning process.

Assemble Incident Action Plan Parts

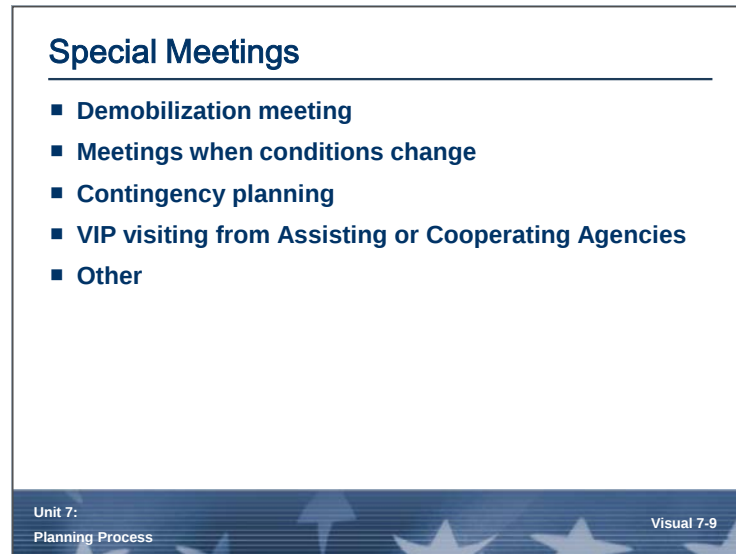
The Liaison Officer ensures coordination between AREPs and the Resource Unit Leader (RESL) on specific assignments of resources. This is a place where the Operations Section depends heavily on the RESL to get the right specific apparatus into the plan. The AREP can assist the RESL here.

Incident Action Plan Distribution

The Liaison Officer ensures that AREPs and their RESL receive copies of the plan. Once the AREP receives the IAP, it should review the plan again to make sure the plan can happen and confirm the resources will be available. This serves as a final checkpoint.

Operations Briefing

The Liaison Officer ensures critical information is getting to Assisting Agencies. This keeps up the constant flow of communication with AREPs.



Explain the Following Key Points

Continue discussing the role of the Liaison Officer in the steps of the planning process.

Demobilization Meeting

As demobilization becomes formalized and a Demobilization Unit is put together, input from the Liaison Officer about the AREPs becomes important, in terms of release priorities and other issues.

Meetings When Conditions Change

The Liaison Officer and AREP need to know how changes affect resources and how resources affect plans.

Contingency Planning

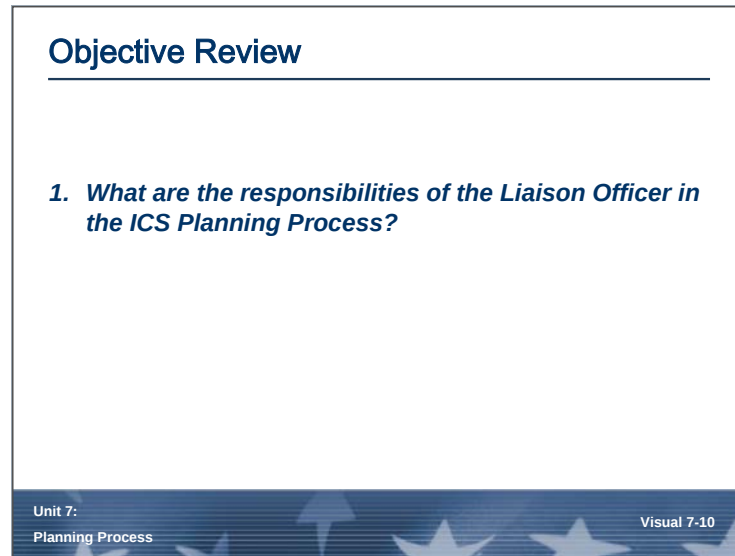
Should contingencies occur, the Liaison Officer needs to be aware of who the players will be and what will occur so they can communicate this information.

VIP Visiting from Assisting or Cooperating Agencies

The larger the incident gets, the more VIPs will show up, up to and including the President.

Other

This includes an incident within an incident.



Explain the Following Key Points

Review the Enabling Objectives for this unit to ensure that the class has obtained the knowledge necessary to successfully meet the Unit Terminal Objective.

Pose the Unit Enabling Objectives as questions. Ask the group to give a brief example or short explanation to answer each question. Try to call on a different student for each objective.

This is not intended to be an inclusive discussion of all material covered in Unit 7, but rather a quick and engaging way to wrap up the unit, and reconnect the students to the material before moving ahead to Unit 8.

Ask the students to write down the top three to five things they learned in this unit on their ICS Forms 214.

Leave the objective slide up so that students can think about what they learned in relation to the objectives.

At the end of the day, collect their ICS Form 214s. This will help identify what the students have learned and what areas may be especially important to highlight throughout the rest of the course.

This activity should be done at the end of each unit.

Unit Terminal Objective

Describe how the Liaison Officer fits into the planning process.

Unit Enabling Objective

Describe the components of the planning cycle

Describe the responsibilities of the Liaison Officer in the ICS planning process