

NWCG Task Book for the Position of:

**STRATEGIC OPERATIONAL PLANNER
(SOPL)**



(POSITION PERFORMANCE REQUIRED ON A WILDFIRE ASSIGNMENT)

PMS 311-72

JUNE 2011

Task Book Assigned To:

Trainee's Name: _____

Home Unit/Agency: _____

Home Unit Phone Number: _____

Task Book Initiated By:

Official's Name: _____

Home Unit Title: _____

Home Unit/Agency: _____

Home Unit Phone Number: _____

Home Unit Address: _____

Date Initiated: _____

The material contained in this book accurately defines the performance expected of the position for which it was developed. This task book is approved for use as a position qualification document in accordance with the instructions contained herein.

**Verification/Certification of Completed Task Book
for the Position of:**

STRATEGIC OPERATIONAL PLANNER (SOPL)

Final Evaluator's Verification

*To be completed **ONLY** when you are recommending the trainee for certification.*

I verify that (trainee name) _____ has successfully performed as a trainee by demonstrating all tasks for the position listed above and should be considered for certification in this position. All tasks are documented with appropriate initials.

Final Evaluator's Signature: _____

Final Evaluator's Printed Name: _____

Home Unit Title: _____

Home Unit/Agency: _____

Home Unit Phone Number: _____ Date: _____

Agency Certification

I certify that (trainee name) _____ has met all requirements for qualification in the above position and that such qualification has been issued.

Certifying Official's Signature: _____

Certifying Official's Printed Name: _____

Title: _____

Home Unit/Agency: _____

Home Unit Phone Number: _____ Date: _____

Additional copies of this publication are available through:
NWCG, Publications Management System at <http://www.nwcg.gov/pms/taskbook/taskbook.htm>

NATIONAL WILDFIRE COORDINATING GROUP (NWCG) POSITION TASK BOOK

NWCG Position Task Books (PTBs) have been developed for designated National Interagency Incident Management System (NIIMS) positions. Each PTB lists the competencies, behaviors and tasks required for successful performance in specific positions. Trainees must be observed completing all tasks and show knowledge and competency in their performance during the completion of this PTB.

Trainees are evaluated during this process by qualified evaluators, and the trainee's performance is documented in the PTB for each task by the evaluator's initials and date of completion. An Evaluation Record will be completed by all evaluators documenting the trainee's progress after each evaluation opportunity.

Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation to the agency that the trainee be certified in that position. Evaluation and confirmation of the trainee's performance while completing all tasks may occur on one or more training assignments and may involve more than one evaluator during any opportunity.

INCIDENT/EVENT CODING

Each task has a code associated with the type of training assignment where the task may be completed. The codes are: O = other, I = incident, W = wildfire, RX = prescribed fire, W/RX = wildfire OR prescribed fire and R = rare event. The codes are defined as:

- O = Task can be completed in any situation (classroom, simulation, daily job, incident, prescribed fire, etc.).
- I = Task must be performed on an incident managed under the Incident Command System (ICS). Examples include wildland fire, structural fire, oil spill, search and rescue, hazardous material, and an emergency or non-emergency (planned or unplanned) event.
- W = Task must be performed on a wildfire incident.
- RX = Task must be performed on a prescribed fire incident.
- W/RX = Task must be performed on a wildfire OR prescribed fire incident.
- R = Rare events such as accidents, injuries, vehicle or aircraft crashes occur infrequently and opportunities to evaluate performance in a real setting are limited. The evaluator should determine, through interview, if the trainee would be able to perform the task in a real situation.

While tasks can be performed in any situation, they must be evaluated on the specific type of incident/event for which they are coded. For example, tasks coded W must be evaluated on a wildfire; tasks coded RX must be evaluated on prescribed fire and so on. Performance of any task on other than the designated assignment is not valid for qualification.

Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.

The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee; the bullets are not all-inclusive. Evaluate and initial ONLY the numbered tasks. DO NOT evaluate and initial each individual bullet.

A more detailed description of this process and definitions of terms are included in the *Wildland Fire Qualification System Guide*, PMS 310-1. This document can be found at <http://www.nwcg.gov/pms/docs/docs.htm>.

RESPONSIBILITIES

The responsibilities of the Home Unit/Agency, Trainee, Coach, Training Specialist, Evaluator, Final Evaluator and Certifying Official are identified in the *Wildland Fire Qualification System Guide*, PMS 310-1. It is incumbent upon each of these individuals to ensure their responsibilities are met.

INSTRUCTIONS FOR THE POSITION TASK BOOK EVALUATION RECORD

Evaluation Record #

Each evaluator will need to complete an evaluation record. Each evaluation record should be numbered sequentially. Place this number at the top of the evaluation record page and also use it in the column labeled "Evaluation Record #" for each numbered task the trainee has satisfactorily performed.

Trainee Information

Print the trainee's name, position on the incident/event, home unit/agency, and the home unit/agency address and phone number.

Evaluator Information

Print the Evaluator's name, position on the incident/event, home unit/agency, and the home unit/agency address and phone number.

Incident/Event Information

Incident/Event Name: Print the incident/event name.

Reference: Enter the incident code and/or fire code.

Duration: Enter inclusive dates during which the trainee was evaluated.

Incident Kind: Enter the kind of incident (wildfire, prescribed fire, search and rescue, flood, hurricane, etc.).

Location: Enter the geographic area, agency, and state.

Management Type or Prescribed Fire Complexity Level: Circle the ICS organization level (Type 5, Type 4, Type 3, Type 2, Type 1, Area Command) or the prescribed fire complexity level (Low, Moderate, High).

Fire Behavior Prediction System (FBPS) Fuel Model Group: Circle the Fuel Model Group letter that corresponds to the predominant fuel type in which the incident/event occurred.

G = Grass Group (includes FBPS Fuel Models 1 – 3):

1 = short grass (1 foot); 2 = timber with grass understory; 3 = tall grass (1½ - 2 feet)

B = Brush Group (includes FBPS Fuel Models 4 – 6):

4 = Chaparral (6 feet); 5 = Brush (2 feet); 6 = dormant brush/hardwood slash;

7 = Southern rough

T = Timber Group (includes FBPS Fuel Models 8 – 10)

8 = closed timber litter; 9 = hardwood litter; 10 = timber (with litter understory)

S = Slash Group (includes FBPS Fuel Models 11 – 13)

11 = light logging slash; 12 = medium logging slash; 13 = heavy logging slash

Evaluator’s Recommendation

For 1 – 4, initial only one line as appropriate; this will allow for comparison with your initials in the Qualifications Record.

Record additional remarks/recommendations on an Individual Performance Evaluation, or by attaching an additional sheet to the evaluation record.

Evaluator’s Signature

Sign here to authenticate your recommendations.

Date

Document the date the Evaluation Record is being completed.

Evaluator’s Relevant Qualification (or agency certification)

List your qualification or certification relevant to the trainee position you supervised.

Note: Evaluators must be either qualified in the position being evaluated or supervise the trainee; Final Evaluators must be qualified in the trainee position they are evaluating.

Strategic Operational Planner (SOPL)

Competency: Assume position responsibilities.

Description: Successfully assume role of Strategic Operational Planner and initiate position activities at the appropriate time according to the following behaviors.

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
Behavior: Ensure readiness for assignment.			
1. Review agency procedures, policies, and regulations for managing wildland fire to achieve land use objectives as related to the position.	O		
2. Obtain complete information from dispatch upon assignment. <ul style="list-style-type: none"> • <i>Assigned Incident Commander's name/location</i> • <i>Agency Administrator's in-briefing time & location</i> • <i>Incident name/number</i> 	O		
Behavior: Ensure availability, qualifications, and capabilities of resources to complete assignment.			
3. Assess situation to determine immediate support needs. <ul style="list-style-type: none"> • <i>Assess skills and qualifications of support personnel.</i> 	I		
4. Obtain roles and permissions in the Wildland Fire Decision Support System (WFDSS) necessary to review relevant decision components for a wildfire incident as requested by the host unit. <ul style="list-style-type: none"> • <i>Owner/group ownership</i> • <i>Appropriate permissions for support staff</i> • <i>Editing/review privileges as necessary</i> 	W		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
Behavior: Gather, update, and apply situational information relevant to the assignment.			
5. Obtain information from supervisor, duty officer, Agency Administrator, dispatch or Incident Commander. <ul style="list-style-type: none"> • <i>Review incident in WFDSS to assess situation and assist in determining support needs.</i> • <i>Review Strategic Objectives and Management Requirements as provided in WFDSS</i> • <i>Jurisdiction</i> • <i>Agency's intent/objectives</i> • <i>Natural resource and cultural concerns</i> • <i>Local policy, standards and guidelines for fire management</i> • <i>Risk management considerations</i> • <i>Cost management considerations</i> 	O		
Behavior: Establish effective relationships with relevant personnel.			
6. Establish and maintain positive interpersonal and interagency working relationships. <ul style="list-style-type: none"> • <i>Fire Management Officer</i> • <i>Agency Administrator</i> • <i>Incident Management Team</i> • <i>Multi-Agency Coordination Group</i> • <i>Cooperators</i> 	I		
Behavior: Establish organization structure, reporting procedures, and chain of command of assigned resources.			
7. Establish the organizational role of the Strategic Operational Planner in relation to assigned personnel, local fire management organization, Incident Commander and/or Agency Administrator. <ul style="list-style-type: none"> • <i>Organization structure (ICS 203, Organization Assignment List)</i> • <i>Information and product flow</i> 	O		
8. Adhere to local policies for ordering, use and release of resources.	O		

Strategic Operational Planner (SOPL)

Competency: Communicate effectively.

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high-risk environment.

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
Behavior: Ensure relevant information is exchanged during briefings and debriefings.			
9. Participate in initial briefing and validate protocols for support personnel. <ul style="list-style-type: none"> • <i>Assess organizational needs.</i> • <i>Identify additional resource needs.</i> • <i>Review expectations of Strategic Operational Planner with Incident Commander and/or Agency Administrator(s).</i> • <i>Identify critical factors to ensure planning module success.</i> • <i>Establish communication methods for relaying information.</i> 	W/RX		
10. Participate in briefings as necessary. <ul style="list-style-type: none"> • <i>Brief external support organizations.</i> • <i>Attend pre-planning and Plans Strategy meetings.</i> • <i>Attend debriefings.</i> 	W/RX		
11. Participate in After Action Reviews (AARs). <ul style="list-style-type: none"> • <i>Identify strengths and weaknesses.</i> • <i>Document opportunities recognized and improvements for future events.</i> 	I		
12. Participate in incident close-out. <ul style="list-style-type: none"> • <i>Ensure participation meets host unit requirements.</i> • <i>Obtain personal performance evaluation.</i> • <i>Provide commendations and recommendations.</i> 	I		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
Behavior: Ensure documentation is complete and disposition is appropriate.			
13. Ensure required documentation is completed, maintained and approved. <ul style="list-style-type: none"> • <i>Assigned Wildland Fire Decision Support System elements</i> • <i>Incident documentation file</i> • <i>Support personnel performance evaluations</i> • <i>Unit logs</i> 	W		
Behavior: Gather, produce and distribute information as required by established guidelines and ensure understanding by recipient.			
14. Identify jurisdictional boundaries and which authorities/agencies should be involved. <ul style="list-style-type: none"> • <i>Strategic objectives and management requirements for relevant Fire Management Units within Planning Area.</i> 	W/RX		
15. Evaluate short- and long-term fire behavior predictions, fire weather and fire behavior assessments and interpret results to support decision making. <ul style="list-style-type: none"> • <i>Brief Incident Commander(s), Agency Administrator(s) or Multi-Agency Coordination Group.</i> • <i>Prepare briefing materials incorporating fire behavior outputs, maps, Predictive Services products as necessary.</i> 	W/RX		
Behavior: Communicate and ensure understanding of work expectations within the chain of command and across functional areas.			
16. Establish and maintain on-going communication on the incident as necessary. <ul style="list-style-type: none"> • <i>Advise on situational assessment, possible alternatives with developed contingency actions, values to be protected and management action points.</i> • <i>Review recommended actions and implementation to ensure it is consistent with agency direction; recommend corrective actions if necessary.</i> • <i>Brief Incident Commander, Command & General Staff, and/or Agency Administrator as necessary.</i> 	I		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
Behavior: Develop and implement plans and gain concurrence of affected agencies and/or the public.			
<p>17. Develop the Course of Action for a long-term wildfire incident.</p> <ul style="list-style-type: none"> • <i>Review Strategic Objectives and Management Requirements prior to course of action implementation to ensure plan requirements are met.</i> • <i>Develop and evaluate appropriate Planning Area.</i> • <i>Evaluate identified threats to life, property and other values at risk in terms of recommended management actions, resources needed, production rates, placement requirements, contingency actions, emergency stabilization and rehabilitation needs to ensure the Course of Action adequately addresses concerns and any necessary mitigation is feasible.</i> • <i>Discuss and establish recommended management actions with Incident Commander, Agency Administrator and designated Resource Advisors.</i> • <i>Obtain long term assessments of weather and fire behavior to develop strategy and tactics associated with the Course of Action. Consider impacts of smoke in course of action.</i> 	W/RX		

Strategic Operational Planner (SOPL)

Competency: Ensure completion of assigned actions to meet identified objectives.

Description: Identify, analyze, and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established timeframe.

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
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Behavior: Administer and/or apply agency policy, contracts and agreements.

18. Coordinate with local Resource Advisor or other designated agency representative and identify issues regarding regulatory environmental compliance and mitigation to ensure concerns are adequately addressed in the Course of Action. <ul style="list-style-type: none"> • <i>Smoke</i> • <i>Threatened and endangered species</i> • <i>Heritage resources</i> • <i>Wilderness plans</i> • <i>Wetland</i> • <i>Watershed</i> 	W/RX		
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Behavior: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.

19. Evaluate consistency between strategic objectives and management requirements as stated in the Wildland Fire Decision Support System, and objectives and requirements for the incident.	W		
20. Utilize risk assessment information in developing Course of Action. <ul style="list-style-type: none"> • <i>Values to be protected</i> • <i>Fire spread projections</i> • <i>Pertinent information on current size, observed fire behavior, fire effects, and forecasted weather elements</i> • <i>Fuel characteristics likely to affect fire behavior and fire effects.</i> • <i>Impacts resulting from projected smoke production.</i> • <i>Resource availability</i> 	W/RX		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
Behavior: Prepare clear and concise assessments regarding hazards, hazard behavior, weather, and other relevant events.			
21. Develop risk assessments for the incident based on values, hazards and probability. <ul style="list-style-type: none"> • <i>Relative Risk Assessment chart</i> • <i>Long-term Risk Assessment</i> • <i>Fire probabilities using FSPro</i> • <i>Values at risk</i> 	W/RX		
22. Consider and document hazards and mitigations in the development of Course of Action.	W/RX		
23. Follow the Risk Management Process in the development of the Management Actions within the Course of Action. <ul style="list-style-type: none"> • <i>Base proposed actions on appropriate risk analysis.</i> • <i>Plan appropriate tactics.</i> • <i>Assess public safety issues.</i> 	W/RX		
Behavior: Modify approach based on evaluation of incident situation.			
24. Evaluate existing Course of Action to determine if identified resource and protection objectives can be met through plan implementation. <ul style="list-style-type: none"> • <i>Review IAP's or other relevant plans for accurate implementation of Course of Action and provide input.</i> • <i>Identify potential changes over time for long duration events that could affect successful implementation of strategic directions and management action points.</i> • <i>Evaluate potential changes in fuels which could affect fire behavior and future management actions.</i> 	W/RX		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
25. Recommend modifications to Course of Action. <ul style="list-style-type: none"> • <i>Evaluate success in meeting incident objectives and requirements.</i> • <i>Utilize field observations on fire behavior and fire effects to recommend modifications to Course of Action. Advise Incident Commander, FMO, and/or Agency Administrator of findings and recommendations.</i> • <i>Evaluate the impacts of additional wildfire starts in adjacent areas.</i> • <i>Evaluate impact of extreme weather events.</i> 	W/RX		
Behavior: Follow established procedures and/or safety procedures relevant to given assignment.			
26. Ensure the Course of Action is consistent with the risk assessment and addresses safety concerns. <ul style="list-style-type: none"> • <i>Work with the safety officer to ensure elements are addressed in the 215A.</i> • <i>Develop actions that adequately address safety concerns.</i> 	I		
Behavior: Ensure operations consider socio-economic, political and cultural aspects.			
27. Identify special areas of concern and describe management actions to address concerns. <ul style="list-style-type: none"> • <i>Socio-economic impacts</i> • <i>Public safety</i> • <i>Local special events</i> 	W/RX		
28. Develop recommended management actions consistent with the wilderness, natural, and cultural resource values in the agency policy and local Land Management Plan(s).	W/RX		
29. Develop cost estimates for individual Management Action Points within the proposed Course of Action.	W/RX		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
Behavior: Transfer position duties while ensuring continuity of authority and knowledge and taking into account the increasing or decreasing incident complexity.			
30. Develop and implement a plan for transfer of duties. <ul style="list-style-type: none"> • <i>Contains accurate assessment of the situation.</i> • <i>Complete transition of functional duties in a timely, smooth, and efficient manner.</i> • <i>Develop appropriate material for Transfer of Command plan as required.</i> • <i>Ensure no adverse impact on safety or productivity.</i> 	I		

Trainee Information

Printed Name:
 Trainee Position on Incident/Event:
 Home Unit/Agency:
 Home Unit /Agency Address and Phone Number:

Evaluator Information

Printed Name:
 Evaluator Position on Incident/Event:
 Home Unit/Agency:
 Home Unit /Agency Address and Phone Number:

Incident/Event Information

Incident/Event Name: _____ Reference (Incident Number/Fire Code): _____
 Duration: _____
 Incident Kind: Wildfire, Prescribed Fire, All Hazard, Other (specify): _____
 Location (include Geographic Area, Agency, and State): _____
 Management Type (circle one): Type 5, Type 4, Type 3, Type 2, Type 1, Area Command
OR Prescribed Fire Complexity Level (circle one): Low, Moderate, High
 FBPS Fuel Model Letter: G = Grass, B = Brush, T = Timber, S = Slash

Evaluator's Recommendation
 (Initial only one line as appropriate)

- _____ **1)** The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. The trainee has successfully performed all tasks in the PTB for the position. I have completed the Final Evaluator's Verification section and recommend the trainee be considered for agency certification.
- _____ **2)** The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. However, opportunities were not available for all tasks (or all uncompleted tasks) to be performed and evaluated on this assignment. An additional assignment is needed to complete the evaluation.
- _____ **3)** The trainee did not complete certain tasks in the PTB in a satisfactory manner and additional training, guidance, or experience is recommended.
- _____ **4)** The individual is severely deficient in the performance of tasks in the PTB for the position and additional training, guidance, or experience is recommended prior to another training assignment.

Record additional remarks/recommendations on an Individual Performance Evaluation, or by attaching an additional sheet to the evaluation record.

Evaluator's Signature: _____ Date: _____
 Evaluator's Relevant Qualification (or agency certification): _____

Trainee Information

Printed Name:
 Trainee Position on Incident/Event:
 Home Unit/Agency:
 Home Unit /Agency Address and Phone Number:

Evaluator Information

Printed Name:
 Evaluator Position on Incident/Event:
 Home Unit/Agency:
 Home Unit /Agency Address and Phone Number:

Incident/Event Information

Incident/Event Name: _____ Reference (Incident Number/Fire Code): _____
 Duration: _____
 Incident Kind: Wildfire, Prescribed Fire, All Hazard, Other (specify): _____
 Location (include Geographic Area, Agency, and State): _____
 Management Type (circle one): Type 5, Type 4, Type 3, Type 2, Type 1, Area Command
OR Prescribed Fire Complexity Level (circle one): Low, Moderate, High
 FBPS Fuel Model Letter: G = Grass, B = Brush, T = Timber, S = Slash

Evaluator's Recommendation
 (Initial only one line as appropriate)

- _____ 1) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. The trainee has successfully performed all tasks in the PTB for the position. I have completed the Final Evaluator's Verification section and recommend the trainee be considered for agency certification.
- _____ 2) The tasks initialed and dated by me on the Qualification Record have been performed under my supervision in a satisfactory manner. However, opportunities were not available for all tasks (or all uncompleted tasks) to be performed and evaluated on this assignment. An additional assignment is needed to complete the evaluation.
- _____ 3) The trainee did not complete certain tasks in the PTB in a satisfactory manner and additional training, guidance, or experience is recommended.
- _____ 4) The individual is severely deficient in the performance of tasks in the PTB for the position and additional training, guidance, or experience is recommended prior to another training assignment.

Record additional remarks/recommendations on an Individual Performance Evaluation, or by attaching an additional sheet to the evaluation record.

Evaluator's Signature: _____ Date: _____

Evaluator's Relevant Qualification (or agency certification): _____