

NWCG Task Book for the Position of:



**STRATEGIC OPERATIONAL PLANNER
(SOPL)**

(POSITION PERFORMANCE REQUIRED ON A WILDFIRE ASSIGNMENT)

PMS 311-72

JUNE 2009

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 used 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 briefing requirements</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>Verify qualifications of support personnel.</i> 	I		
4. Receive necessary permissions in the wildland fire decision support documentation to document incident decisions and interact with incident commander and/or agency administrator ("Author" role).	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>Fire Management Plan/Land Resource Management Plan</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>Fiscal parameters</i> 	O		
Behavior: Establish effective relationships with relevant personnel.			
6. Establish and maintain positive interpersonal and interagency working relationships.	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>Reporting procedures</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> 	W		
10. Participate in briefings as necessary. <ul style="list-style-type: none"> • <i>Brief external support organizations.</i> 	W		
11. Participate in debriefings as necessary.	W		
12. Participate in After Action Reviews (AARs). <ul style="list-style-type: none"> • <i>Staff/Organization</i> • <i>Strengths and weaknesses</i> • <i>Commendations and recommendations</i> 	I		
13. Participate in incident close-out with Agency Administrator. <ul style="list-style-type: none"> • <i>Participation meets agency requirements</i> • <i>Personal performance evaluation</i> • <i>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.			
14. Ensure required documentation is completed, maintained and approved as required. <ul style="list-style-type: none"> • <i>Validation</i> • <i>Periodic assessment</i> • <i>Decision summary</i> • <i>Reports</i> • <i>Tracking of recommended management actions</i> 	O		
Behavior: Gather, produce and distribute information as required by established guidelines and ensure understanding by recipient.			
15. 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.</i> 	W		
Behavior: Communicate and ensure understanding of work expectations within the chain of command and across functional areas.			
16. Remain in communication with Incident Commander and/or Agency Administrator. <ul style="list-style-type: none"> • <i>Advise on, projected fire behavior, conditions, possible alternatives with developed contingency actions, values to be protected and management action points. Ensure recommended actions and implementation is consistent with agency direction.</i> 	I		
17. Establish and maintain on-going communication with Operations Section.	I		
18. Negotiate time frames and protocols for periodic assessment. <ul style="list-style-type: none"> • <i>Frequency</i> • <i>Method of approval</i> 	W		

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>19. Prepare the Course of Action for a Response Level 2 situation.</p> <ul style="list-style-type: none"> • <i>Review approved programmatic fire management/land management plan prior to implementation and ensure operations plan requirements are met.</i> • <i>Analyze multi-operations situation/factors to develop or revise short-term implementation actions for the Course of Action.</i> • <i>Incorporate forecasted weather, fire behavior predictions, and hazard and safety concerns into planning recommended management actions.</i> • <i>Develop and evaluate location and determine defensibility and need for support actions to protect areas of concern.</i> • <i>Develop and/or review recommended management actions, resources needed, and contingency actions to ensure the Course of Action adequately addresses concerns and is feasible to implement.</i> • <i>Advise Incident Commander and/or Agency Administrator findings and recommendations and obtain approval.</i> • <i>Determine relative risk of fire through completion of Relative Risk Assessment chart.</i> 	W		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
<p>20. Prepare the Course of Action for a Response Level 3 situation.</p> <ul style="list-style-type: none"> • <i>Analyze multi-operations situation/factors to develop or revise short-term implementation actions for the Course of Action.</i> • <i>Incorporate fire behavior predictions and long term risk assessment developed or revised by Long Term Fire Analyst and interpret results to support decision making.</i> • <i>Develop and evaluate appropriate Planning Area.</i> • <i>Develop and/or review identified threats to life, property and other values at risk to ensure feasibility of Course of Action.</i> • <i>Develop and/or review recommended management actions, resources needed, production rates, placement requirements and contingency actions to ensure the Course of Action adequately addresses concerns and is feasible to mitigate them.</i> • <i>Discuss and establish recommended management actions with Incident Commander and/or Agency Administrator.</i> • <i>Advise Incident Commander and/or Agency Administrator of findings and recommendations.</i> 	W		
<p>21. Ensure coordination and communication with the public and other agencies.</p> <ul style="list-style-type: none"> • <i>Verify planned notifications of agency and public contacts and identify additional contacts.</i> • <i>Monitor feedback from public/agencies notified, and make necessary adjustments.</i> • <i>Ensure timely notification to remote publics regarding fire risk and potential.</i> 	W/RX		
<p>22. Review IAP's or other relevant plans for accurate implementation of Course of Action.</p>	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
Behavior: Administer and/or apply agency policy, contracts and agreements.			
23. Ensure applicable contracts and agreements are addressed as necessary in the Course of Action. <ul style="list-style-type: none"> • <i>Aviation contracts</i> • <i>Engine and crew contracts</i> • <i>Tribal contracts</i> • <i>Mutual aid agreements</i> 	I		
24. Ensure regulatory environmental compliance and mitigation is 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> 	W/RX		
Behavior: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.			
25. Obtain weather forecasts, updates and special advisories to develop strategy and tactics associated with the Course of Action. <ul style="list-style-type: none"> • <i>Establish communication with the meteorologist from the field or office locations.</i> • <i>Request and receive spot (or other appropriate level) weather forecasts.</i> • <i>Inform meteorologist about special concerns.</i> 	W/RX		
26. Utilize fire behavior predictions for setting priorities. <ul style="list-style-type: none"> • <i>Values to be protected</i> • <i>Fire spread progression</i> 	W/RX		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
27. Anticipate and evaluate impacts, resulting from smoke, in the Course of Action. <ul style="list-style-type: none"> • <i>Coordinate with air quality authorities.</i> • <i>Follow applicable air quality compliance guidelines.</i> • <i>Use appropriate smoke emissions prediction systems.</i> 	W/RX		

Behavior: Prepare clear and concise assessments regarding hazards, hazard behavior, weather, and other relevant events.

28. Ensure completion of documented (formal and informal) hazard analysis in the wildland fire decision support documentation.	W/RX		
29. Affirm with Incident Commander and/or Agency Administrator continued management of the fire through periodic fire assessment. <ul style="list-style-type: none"> • <i>Review the response level of planning.</i> • <i>Meet resource objectives.</i> 	W		
30. Ensure the Risk Management Process is maintained in the Course of Action.	I		
31. Base proposed actions on appropriate risk analysis. <ul style="list-style-type: none"> • <i>Plan appropriate tactics.</i> • <i>Ensure public safety.</i> 	I		
32. Ensure consistency between Fire Management Plan and Land Use Plan objectives as stated in wildland fire decision support documentation and incident objectives as developed by Incident Command Staff.	W		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
Behavior: Modify approach based on evaluation of incident situation.			
33. Evaluate existing Course of Action to determine if agency policy and identified resource objectives can be met through plan implementation. <ul style="list-style-type: none"> • <i>Review approved programmatic fire management plan prior to implementation and ensure operations plan requirements are met.</i> • <i>Review recommended management actions, resources needed, and contingency actions to ensure the Course of Action adequately addresses concerns and is feasible to mitigate them.</i> • <i>Advise Incident Commander and/or Agency Administrator of findings and recommendations.</i> • <i>Make necessary revisions/amendments to the Course of Action.</i> 	W		
Behavior: Follow established procedures and/or safety procedures relevant to given assignment.			
34. Ensure safety considerations are integrated into appropriate aspects of the Course of Action. <ul style="list-style-type: none"> • <i>Aviation operations</i> • <i>Ground operations</i> 	I		
Behavior: Ensure operations consider socio-economic, political and cultural aspects.			
35. Identify special areas of concern and describe management action points.	W/RX		
36. Develop recommended management actions consistent with the wilderness, natural, and cultural resource values in the agency policy.	W/RX		
37. Ensure implementation operations do not compromise wilderness, natural, cultural resource values or other applicable objectives contained in the Land Management Plan(s).	W/RX		

Strategic Operational Planner (SOPL)

TASK	C O D E	EVAL. RECORD #	EVALUATOR: Initial & date upon completion of task
38. Evaluate the impacts of multiple wildfires and advise Incident Commander and/or Agency Administrator. <ul style="list-style-type: none"> • <i>Natural resources</i> • <i>Local economy</i> • <i>Social demographics</i> • <i>Political institutions</i> • <i>Local unit management capability</i> 	W/RX		
Behavior: Transfer position duties while ensuring continuity of authority and knowledge and taking into account the increasing or decreasing incident complexity.			
39. 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>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): _____