ARIZONA QUALIFICATION SYSTEM

EOC / ICS ALL HAZARDS POSITION TASK BOOK FOR THE POSITION OF

Mental Health K-12 Education Specialist

Check the appropriate position type:

☐ Single Type

Version 3

POSITION TASK BOOK ASSIGNED TO:	
CANDIDATE'S NAME:	
EDUCATION AGENCY:	
PHONE NUMBER:	
EMAIL:	
POSITION TASK BOOK INITIATED BY:	
SUPERINDENT / DIRECTOR and SIGNATURE:	
TITLE:	
EDUCATION AGENCY:	
PHONE NUMBER:	
EMAIL:	
POSITION TASK BOOK WAS INITIATED:	
LOCATION:	
DATE:	

Evaluator Verification

*(Do not complete this form unless you are recommending the candidate for **all-hazards certification.**)*

FINAL EDUCATIONAL AGENCY EVALUATOR VERIFICATION
I verify that _____ has successfully completed all tasks as a candidate and should therefore be considered for certification in this position. I also verify that all tasks are documented with appropriate initials.
FINAL EVALUATOR'S SIGNATURE:
DATE:
FINAL EVALUATOR'S PRINTED NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:

Documentation of Agency Certification

DOCUMENTATION EDUCATION AGENCY CERTIFICATION BY THE AHJs CERTIFYING OFFICER
I certify that_____ has successfully met all of the criteria set out in the National Incident Management System (NIMS) Job Title/Position Qualifications document for the position and adhering to NIMS NQS EOC Skill Sets will hereby receive certification of his/her qualification.
OFFICIAL'S SIGNATURE:
DATE:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:

Position Task Book Overview

The Position Task Book (PTB) documents the performance criteria a candidate must meet to be certified for a position within the Arizona Qualification System (AQS). The performance criteria are associated with core NIMS NQS EOC Skill Sets and NQS PTB competencies, behaviors and tasks. This PTB covers relevant positions within all 3 EOC structures (ICS-Like, Incident Support Model, and Departmental Structure)

> **A candidate may not work on multiple position type PTBs for a specific position at the same time; for example, a candidate may not simultaneously work on a Type 1 Incident Commander PTB and a Type 2 Incident Commander PTB. If a position has multiple types, the candidate must, in most cases, qualify at the lowest type before pursuing the next higher type. For example, before seeking qualification for a Type 1 position, an individual must first qualify at the Type 3 level and then at the Type 2 level.**

Evaluation Process

- Evaluators observe and review a candidate's completion of PTB tasks, initialing and dating each successfully completed task in the PTB.

- Evaluators complete an Evaluation Record Form after each evaluation period by documenting the candidate's performance.

- The Authority Having Jurisdiction (AHJ) may not have enough resources to ensure that every evaluator is qualified in the position being assessed. Therefore, a candidate's supervisor may evaluate the completion of PTB tasks. For example, a Logistics Section Chief has the authority to sign off on completed PTB tasks for a Food Unit Leader candidate.

- The final evaluator is a leader who verifies that a candidate has completed the PTB and met all requirements for the position. A final evaluator is generally qualified in the same position for which the candidate is applying. When possible, the evaluator and the final evaluator should not be the same person, but in situations with limited resources, the evaluator can also serve as the final evaluator.

- Once the final evaluator has completed the Final Evaluator Verification, it is forwarded to the Quality Control Officer (QCO) at DEMA along with supporting evidence that the candidate has completed all position requirements. The QCO will put the PTB and all sent documents on the QRB calendar. The QRB review will make it's recommendation to the AHJs CO. The CO in all cases will make the final determination for certification.

- After the QRB review, the AHJ Certifying Officer completes the Documentation of Agency Certification form as appropriate. That form is sent to the QCO who will issue an Arizona Gold Card credential for that individual. The Gold Card will <u>ONLY</u> be issued if the QRB gave a positive recommendation.

Note: A School-Based K-12 Mental Health Professional interact with students to enhance social/ emotional or behavioral adjustment and well being. They also provide solution focus interventions for mental health and well being.

Transferring Qualifications

- Personnel who have documentation of previous education, training, or significant on-the-job incident experience may receive credit toward qualification for a given position. Each AHJ will establish their requirements for this, usually on a case by case basis. Each AHJ establishes the requirements for transferring qualifications from another AHJ.
- If an AHJ chooses not to accept a trainee's existing certification of qualification, the trainee may be reevaluated in the specific position and issued a new PTB.
- An individual may hold multiple qualifications, such as Final Evaluator, and also hold one or more PTB credentials.
- In all cases to receive Gold Card a AQS PTB will be completed by the individual and forwarded through the AHJs CO to the QCO to be put on the schedule for a review by the QRB.

Mandatory Training Requirements

Section 1

IS-100: Introduction to the Incident Command System (ICS)**
IS-200: Basic Incident Command System for Initial Response**
IS-700: NIMS: An Introduction**
IS-800: National Response Framework: An Introduction**
IS-2200: Basic Emergency Operations Center Functions**
ICS-300: Intermediate Incident Command System
ICS-400: Advanced Incident Command System

** It is recommended these on line classes be completed before initiation of a Position Task Book

Section 2

Must have a Bachelor Degree in an educational field.
Must be currently engaged in the educational field.
Must have three years experience working in the educational field.

Section 3
Must have taken the PREPaRE or REMS training within the last three years:

PREPaRE WORKSHOP 1:
Crisis Prevention and Preparedness
Comprehensive School Safety Planning
PREPaRE WORKSHOP 2:
Crisis Intervention and Recovery
The Roles of School-Based Mental Health Professional

OR

REMS training equivalent (Readiness and Emergency Management for Schools)

Evaluator Verification

<table>
<tr><td colspan="2" align="center">**ANNUAL EVALUATOR VERIFICATION** To
verify ongoing activity towards PTB completion</td></tr>
<tr><td>Start Date : _____</td><td>Evaluator: _____</td></tr>
<tr><td>First Year : _____</td><td>Evaluator: _____</td></tr>
<tr><td>Second Year: _____</td><td>Evaluator: _____</td></tr>
<tr><td>Third Year: _____</td><td>Evaluator: _____</td></tr>
<tr><td>Fourth Year: _____</td><td>Evaluator: _____</td></tr>
<tr><td>Fifth Year: _____</td><td>Evaluator: _____</td></tr>
</table>

*This Position Task Book has a currency requirement of 3 Years after the date of credentialing.

<table>
<tr><td align="center">**Arizona Qualification System**
American Disabilities Act (ADA) Compliance</td></tr>
<tr><td>

The Americans with Disabilities Act (ADA) and Americans with Disabilities Amendment Act (ADAA) Compliance:

The Department of Emergency and Military Affairs (DEMA) Arizona Qualification System (AQS) establishes guidance and tools to assist state, local, and tribal Authority Having Jurisdiction (AHJ) in developing qualified, certified, and credentialed deployable personnel.

Qualified individuals seeking reasonable accommodations for tasking and deployment must contact their employing AHJ. State, local, and tribal AHJ providing qualified individuals for tasking and deployments are solely responsible for processing reasonable accommodation requests in accordance with the ADA/ADAA and applicable AHJ's policies and procedures, before and during tasking and deployments.

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Position Task Book Competencies, Behaviors and Tasks

> **The PTB sets minimum criteria for certification for a position. The AHJ has the authority to add content to the baseline PTB competencies, behaviors and tasks as necessary.**

The PTB covers all type levels for a given position, but an AHJ may check only one "Type" box and work on only one type at a time. (The National Incident Management System (NIMS) Job Title/Position Qualifications document describes all types.)

> **Command and General Staff job titles/positions qualifications are typed based on incident complexity, while all other NIMS positions are typed based on the minimum qualifications.**

Definitions

Competency: An observable, measurable pattern of knowledge, skills, abilities and other characteristics an individual needs to perform an activity and its associated tasks. A competency specifies the skillset a person needs to possess to complete the tasks successfully.

Behavior: An observable work activity or a group of similar tasks necessary to perform the activity.

Task: A specific, demonstrable action necessary for successful performance in a position. Candidates must demonstrate completion of required tasks.

- Occasionally, PTB tasks are unique to one of the types; for example, certain tasks apply only to a Type 3 Incident Commander, not to a Type 2 or Type 1 Incident Commander. In those cases, the PTB indicates the corresponding type at the beginning of the task.
- All tasks require evaluation. Bullet statements within a task are only examples and do not need to be performed to have a task signed off.

PTB Task Codes

For each of the tasks listed in the Position Task Book (PTB), there are one or more codes describing the circumstances in which the candidate can perform tasks related to the position. If a task has multiple codes listed, it means the evaluator can assess the candidate on any of those circumstances as opposed to evaluating the candidate on all of the listed codes.

Code C: Task performed in training or classroom setting, including seminars and workshops.

Code E: Task performed on a full-scale exercise with equipment deployment under the Incident Command System (ICS).

Code F: Task performed during a functional exercise managed under the ICS.

Code I: Task performed on an incident or event managed under ICS. Examples of incidents and events that may employ ICS include but are not limited to an oil spill, search and rescue, hazardous material response, fire and emergency or non-emergency (planned or unplanned) events.

Code J: Task performed as part of day-to-day job duties.

Code T: Task performed during a tabletop exercise.

How to Complete the Evaluation Record Form

Each Evaluation Record Form (see next page) covers one evaluation period. Evaluation periods may involve incidents, classroom simulations or daily duties, depending on what the PTB recommends. The AHJ determines the number of evaluations required for position qualification and certification. If evaluators need additional evaluation periods, they can copy pages from a blank PTB and attach them to the PTB in question.

Complete these items AT THE START of the evaluation period:

Evaluation Record Number: Label each evaluation record with a number to identify the incident(s), exercise(s) or event(s) during which the candidate completed the PTB tasks. The evaluator should also write this number in the PTB column labeled "Evaluation Record #" for each task performed satisfactorily. This number enables reviewers of the completed PTB to ascertain the evaluators' qualifications before signing off on the PTB.

Evaluator's name; Incident/office title and agency: List the name of the evaluator, his/her incident position or office title and the evaluator's home agency.

Evaluator's home jurisdiction address and phone: List evaluator's home jurisdiction address and phone number.

Name and location of incident or simulation/exercise or Job Function : Identify the name (if applicable) and location where the candidate performed the tasks.

Incident kind: Enter the kind of incident (such as hazmat, law enforcement, wildland fire, structural fire, search and rescue, flood or tornado).

Complete these items AT THE END of the evaluation period:

Number and kind of resources: Enter the number of resources assigned to the incident and their kind (such as team, personnel and equipment) pertinent to the candidate's PTB.

Evaluation period: Enter inclusive dates of candidate evaluation. This time span may cover several small, similar incidents.

Position type: Enter position type (such as Type 3, Type 2, Type 1 or Single Type).

Recommendation: Check the appropriate line and make comments below regarding the candidate's future development needs.

Additional recommendations/comments: Provide additional recommendations and comments about candidate, as necessary.

Date: List the current date.

Evaluator's initials: Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.

Evaluator's relevant qualification: List your certification relevant to the candidate position you supervised.

Evaluation Record Form

CANDIDATE NAME:
CANDIDATE POSITION:
Evaluation Record Number:
Evaluator's name:
Incident/office title and agency:
Evaluator's home jurisdiction address and phone:
Name and location of incident or simulation/exercise or job function:
Incident kind:
Number and kind of resources:
Evaluation period:
Position type:

Recommendation:
The above named candidate performed the initialed and dated tasks under my supervision. I recommend the following for this candidate's further development:
 	
       The candidate has successfully performed all required tasks for the position. The AHJ should consider the individual for certification.
 	
       The candidate could not complete certain tasks or needs additional guidance. See comments below.
 	
       Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation.
 	
       The candidate is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a candidate for this position.

Additional recommendations/comments:
Date:
Evaluator's initials:
Evaluator's relevant qualification:

Mental Health K-12 Educational Specialist

1. Competency: Assume position responsibilities

Description: Successfully assume the role of Mental Health K-12 Educational Specialist and initiate position activities at the appropriate time according to the following behaviors.

1a. Behavior: Ensure readiness for assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

1. Obtain, assemble and prepare information and materials for go-kit. The kit should contain critical items for the assignment and be easily transportable:
• Supplies:
  o Office supplies appropriate to the function
  o Authority Having Jurisdiction (AHJ) identification badge and qualification card
• Reference materials:
  o Functional guidelines relative to incident type (agency guidance or other functional guidelines)
  o AHJ operations guides or other operational guides
  o Position manuals
• Forms:
  o Agency-specific forms appropriate to the function
	E, F, I		

2. Obtain complete incident and logistical information: • Incident name, number, anticipated duration, size, type, responsibilities and expectations • Reporting time and location • Transportation arrangements and travel routes • Contact procedures during travel (telephone/radio) • Expected working conditions • Personal Protective Equipment (PPE) • Security measures • Updated contact information and information links	E, F, I		
3. Arrive properly equipped at designated time and location and check in according to agency/organization guidelines: • Arrive with go-kit and any additional equipment • Carry out check-in procedures and ensure assigned personnel do the same	E, F, I		

1b. Behavior: **Obtain information relevant to position assignment**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
4. Receive briefing from the Incident Commander (IC) or his designee or the outgoing Mental Health Educational Leader: • Meetings and briefings schedule • Situational assessment • Incident objectives • Strategy • Hazards to incident personnel and public • Agencies/jurisdictions involved • Organizational structure • Resources summary • Logistical needs • Incident priorities and status: life safety, incident stabilization, property and environment • Timing and scheduling • Expected products	E, F, I		
5. Obtain and review necessary documentation: • Copy of Delegation of Authority, Letter of Expectation, Letter of Agreement or Memorandum of Understanding (MOU) • Applicable plans and reports • Directories: phone, notification • Written incident status summary • Authorizations: cell phones, rental vehicles, computers	E, F, I		

1c. Behavior: **Establish or determine organizational structure, resource and staffing needs**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
Number 6 redacted in Version 3	E, F, I		
Number 7 redacted in Version 3			

2. Competency: Lead assigned personnel

Description: Influence, lead and direct assigned personnel to accomplish objectives and desired outcomes in a potentially rapidly changing environment.

2a. Behavior: Model leadership values and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
8. Understand and comply with NIMS/Incident Command System (ICS) concepts and principles: • Establish and modify an effective organization based on changing incident and resource conditions • Maintain appropriate span of control • Act as a representative of incident leadership	E, F, I		
9. Create a positive work environment: • Communicate leader's intent and guidance • Manage function and its activities effectively • Proactively assume responsibility for the incident and initiate action	E, F, I		
10. Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
11. Establish and maintain positive interpersonal and interagency working relationships: • Understand scope, roles, responsibilities, jurisdiction and authority of responding agencies	E, F, I		

2b. Behavior: Communicate incident priorities and supervise personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
Number 12 redacted in Version 3	E, F, I		
13. Ensure that staff follows all applicable agency/ jurisdiction policies, contracts, standard operating procedures and agreements: • Federal, state, local, tribal, territorial and regional relationships, as appropriate • Roles and responsibilities of potential responder agencies • Scope, jurisdiction and authority of potential responder agencies' contingency plans	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
Number 14 redacted in Version 3	E, F, I		
15. Ensure debriefings occur and participate as necessary: • Ensure incident situation status information is current and complete	E, F, I		

2c. Behavior: Ensure the health, safety, welfare and accountability of assigned personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
16. Evaluate mental and physical fatigue of assigned personnel: • Ensure adequate rest is provided to section personnel	E, F, I		
17. Recognize potentially hazardous situations, inform assigned personnel of hazards and take precautions to mitigate risk: • Adjust operations in response to hazards, weather and other relevant events	E, F, I		
18. Demonstrate knowledge of and comply with relevant health and safety requirements: • Direct and oversee operations to ensure compliance with health and safety considerations and guidelines • Coordinate with the Safety Officer to ensure that assigned personnel follow safety guidelines	E, F, I		
19. Report or explain the procedures for reporting unexpected occurrences, such as fire, death, injury, illness, exposure to pathogens or hazardous materials (HAZMAT), accident, political contact or property loss or damage: • Ensure report contains nature of event, location, magnitude, personnel involved and initial action taken (such as helicopter picking up injured or an appropriate subsequent action) • Ensure the protection of Personally Identifiable Information (PII) while reporting • Obtain information from the following sources regarding special hazards, threats or unexpected occurrences: subordinates, personal observation, other incident personnel and off-incident personnel	E, F, I		

2d. Behavior: **Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
20. Demonstrate the ability to identify opportunities for universal accessibility.	E, F, I, J		
21. Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access.	E, F, I, J		
22. Provide equal access, disability accommodations and access and functional needs (AFN) accommodations.	E, F, I, J		

3. Competency: **Conduct operations and ensure completion of assigned tasks**

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

3a. Behavior: **Set the incident priorities**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
23. Attend and participate in strategy meetings as necessary: • Assess organizational needs • Identify additional resource needs • Identify critical factors to ensure incident success • Prioritize incident objectives	E, F, I		
Number 24 redacted in Version 3	E, F, I		
Number 25 redacted in Version 3	E, F, I		
Number 26 redacted in Version 3	E, F, I		

3b. Behavior: **Develop and implement plans**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

27. Participate in the planning process:
• Prepare for and participate in planning meetings
• Assist in the development of plans, as necessary:
  o Long-range
  o Strategic
  o Contingency
  o Demobilization
  o Continuity of Operations Plan (COOP)
	E, F, I		

28. Review, validate and modify plans: • Analyze alternate strategies and explain decisions • Validate or revise incident objectives • Review information covering health and safety principles, known hazards and importance of all periods • Validate organizational structure • Validate resource assignments • Review reserve resources • Evaluate immediate support needs	E, F, I		
Number 29 redacted in Version 3	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
Number 30 redacted in Version 3	E, F, I		

3c. Behavior: Coordinate with all appropriate personnel and stakeholders

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
31. Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s): • Outgoing incident staff or teams • Local agencies • AHJ • Policy Group • Public • Supporting agencies • Liaisons and contacts	E, F, I		
32. Establish effective relationships and coordinate with incident personnel: • IMT personnel • Other supporting personnel	E, F, I		

33. Compile incident information from stakeholders for use in briefings:
• Within the first operational period, obtain incident information from:
  o IC or emergency operations center (EOC) manager
  o Planning Section Chief or Information and Planning Section Chief
  o Resources Unit
  o Situation Unit
• Update incident information by the beginning of each operational period
• Contact Public Information Officer (PIO) and coordinate information provided to external agency PIO, the press, elected officials and the public
• Prepare and include necessary information about responding agencies in the Incident Action Plan (IAP) as necessary
	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

34. Assemble requestor information for use in answering requests and resolving problems:
• Obtain assisting, cooperating and nongovernmental agency information:
    ○ Contact persons (agency representatives)
    ○ Email addresses and social media contacts
    ○ Radio frequencies
    ○ Phone and pager numbers
    ○ Cooperative agreements
    ○ Equipment type
    ○ Number of personnel
    ○ Condition of equipment and personnel
    ○ Agency/organization constraints or limitations
	E, F, I		

35. Act as a representative for the IC.	E, F, I		

3d. Behavior: Apply agency policy, contracts and agreements

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
Number 36 redacted in Version 3	E, F, I		
37. Complete all work according to organization/agency direction, policy and incident objectives: • Ensure that personnel complete all documentation requirements according to organization/agency direction, policy and incident objectives	E, F, I		

3e. Behavior: Make appropriate decisions based on evaluation of gathered information, risks and incident situation and use information to produce outputs and modify approach

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
Number 38 is redacted in Version 3	E, F, I		

3f. *Behavior:* Ensure documentation is complete

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
39. Review documents for accuracy, timeliness and appropriate distribution.	E, F, I		
40. Maintain and collect personal records related to incident: • Time sheet • Rental records • Accident forms • Property records o Equipment time records • Receipts	E, F, I		
41. Maintain and submit incident records for events, personnel, equipment, supplies and other data for incident management needs: • Property loss/damage reports • Agency-required incident reports • Activity log • Changes in strategy and tactics	E, F, I		

4. Competency: Communicate effectively

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

4a. Behavior: Ensure the exchange of relevant information during briefings

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
42. Prepare for and participate in briefings: • Ensure briefings are accurate, timely and include appropriate personnel • Brief external support organizations • Share and evaluate information	E, F, I		
43. Contribute to staff briefings and debriefings.	E, F, I		
44. Contribute to briefings at predetermined times and locations for stakeholders and assisting, cooperating and nongovernmental agencies prior to each operational period.	E, F, I		
Number 45 redacted in Version 3	E, F, I		

5. *Competency:* **Prepare for demobilization/transfer**

Description: Demobilize position and transfer position duties.

5a. Behavior: **Transfer position duties while ensuring continuity**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
46. Complete the process for demobilizing position responsibilities: • Brief and provide complete and accurate records to relief personnel • Discuss equipment release considerations • Provide information to supervisor to assist with decisions on release priorities • Coordinate with appropriate partners regarding demobilization procedures • Brief personnel on demobilization responsibilities • Ensure personnel demobilize in a timely and complete manner • Emphasize safety and accountability during this phase of operations	C, E, F, I, J, T		
47. Coordinate an efficient transfer of position duties when deactivating or demobilizing resources: • Inform assigned personnel • Notify incoming personnel when and where transition of positions will occur • Conduct transition effectively • Document follow-up action and submit to agency representative	E, F, I		
48. Complete all necessary reports and narratives following common standards before turnover: • Activity log • Shift change • End of operational period • Reassignment • Deactivation/demobilization	E, F, I		
49. Participate in transition or incident closeout: • Conduct debriefings with agency administrator(s) as requested • Close out incident as appropriate for the AHJ	E, F, I		

5b. Behavior: **Plan for demobilization and ensure staff follow demobilization process**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
50. Participate in the development, approval and implementation of the demobilization plan: • Coordinate with appropriate partners regarding demobilization procedures • Coordinate needs and responsibilities	E, F, I		

Emergency Operations Center Skillsets

Emergency Operations Center Skillsets have many tasks that are interchangeable with the tasks on the previous pages. Duplicated tasks have been grayed out. All remaining tasks must be completed.

Duplicated tasks are kept in this PTB as evidence supporting the collaboration and alignment with the FEMA EOC Skillsets. These requirements have been met through the completion of previous tasks within this PTB.

NOTE:
Grayed out tasks are marked in the Evaluator Record # and Initials/Date Column.

Emergency Operations Center (EOC) Skillset: Document and Records Management

Task Categories:
Collect and store documents and records
Provide documents and records upon request

Task Category: **Collect and store documents and records**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Follow document and records management procedures and policies.	E, F, I		
3. Monitor, review, and assess activity logs, charts, and records for completeness and follow up on any that are incomplete.	E, F, I		
4. Collect and package information for after action review.	E, F, I		

Task Category: **Provide documents and records upon request**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5. Monitor compliance with information management processes and procedures.	E, F, I		
6. Perform real-time documentation collection and storage.	E, F, I		
7. Archive documents such as activity logs, charts, and records.	E, F, I		

Emergency Operations Center (EOC) Skillset: Action Tracking

Task Categories:
Perform action tracking

Task Category: **Perform action tracking**

TASKS	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		

Emergency Operations Center (EOC) Skillset: Organizational Representation

Task Categories:
Represent your organization and support EOC activities
Understand discipline-specific resource streams

Task Category: **Represent your organization and support EOC activities**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate subject matter expertise related to the organization you represent.	E, F, I, J, T		
2. Demonstrate understanding of your organization's policies, plans, resources, and constraints.	E, F, I, J, T		
4. Evaluate and monitor the situation and advise supervisor and other appropriate personnel: • Identify problems and recommend solutions • Provide essential elements of information to those serving in a situational awareness function • Provide information to represented organization and third parties • Demonstrate ability to forecast resource needs, potential consequences, and cascading effects of action or inaction	E, F, I		
5. Proactively coordinate with other organizational representatives on issues such as: • Shared resources • Cascading effects on organizations • Efficiency of assistance • Resource availability	E, F, I, T		
6. Brief relevant audiences on represented organization's issues related to the incident.	E, F, I		
7. Represent the organization in the planning process.	E, F, I		
8. Communicate back to your organization to share situational awareness.	E, F, I		

Task Category: **Understand discipline-specific resource streams**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
9. Track organizational resources, associated costs, and logistical concerns.	E, F, I		

Emergency Operations Center (EOC) Skillset: Performance Improvement

Task Categories:
Collect and analyze information regarding EOC activation and activities
Suggest process improvements and solutions during EOC operations
Support process improvement following EOC deactivation

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

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. 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		
2. Collect, store, and analyze data for the after action review and improvement plan.	E, F, I		
3. Perform real-time data collection during response: • Use accepted tools, such as EOC activity logs	E, F, I		
4. Provide guidance to EOC leadership on collecting performance improvement-related data.	E, F, I		

Task Category: **Suggest process improvements and solutions during EOC operations**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5. 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		
6. Provide recommendations to leadership for approval and dissemination.	E, F, I, J		

Task Category: **Support process improvement following EOC deactivation**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
7. 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		
8. Participate after action review-related meetings to identify and clarify areas for improvement. • Support facilitation of meetings as necessary	E, F, I, J		
9. Identify best practices and areas for improvement.	E, F, I, J		
10. Develop recommendations to address areas for improvement.	E, F, I, J		

Emergency Operations Center (EOC) Skillset: Situational Awareness

Task Categories:
Gather data and information
Analyze data and information
Disseminate information

Task Category: **Gather data and information**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Collect and monitor data and information: • Sources include Incident Action Plan (IAP), on-scene incident reports, EOC personnel, National Weather Service, jurisdictional liaisons, fusion centers, traditional media, social media, and others • Content includes demographic, damage assessment, infrastructure, supply chain, and geographic data and information	E, F, I, J		
3. Coordinate with EOC personnel to gather information.	E, F, I		

Task Category: **Analyze data and information**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
4. Establish and implement processes for estimating cascading effects of action or inaction: • Evaluate potential consequences and mitigation actions • Identify trends • Engage technical specialists	E, F, I		

5. Use demographic information to inform analysis:
• Cultural diversity
• Potential vulnerabilities
• Damage assessment
• Specific service needs, such as:
  o Individuals with disabilities and other access and functional needs
  o Individuals with critical transportation needs
	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
6. Analyze information: • Establish and implement procedures for verifying, organizing, prioritizing, and tracking information • Convert raw data into information • Identify and address misinformation • Verify and analyze input for critical information • Clarify incomplete information • Identify incident-specific essential elements of information and critical information requests	E, F, I		
7. Recognize incident-specific critical information to be disseminated immediately.	E, F, I		
8. Prepare situational briefings, reports, displays, briefing tools, and other information products.	E, F, I		

Task Category: **Disseminate information**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
9. Establish and implement a process for developing and disseminating situational information at regular intervals: • Obtain approval for distribution in accordance with policies and procedures • Determine distribution lists • Determine methods for distribution	E, F, I		
10. Follow processes for identifying, verifying, and disseminating critical information: • Coordinate with public affairs to disseminate information externally	E, F, I		
11. Display within the EOC situational information and data about significant events.	E, F, I		
12. Use visualizations such as graphs, photographs, and maps to graphically depict information.	E, F, I		
13. Use mapping/geospatial data and sources, including Geographic Information Systems, web-based maps, and paper maps.	E, F, I, J		
14. Present and distribute situational briefings, reports, displays, briefing tools, and other information products.	E, F, I		
15. Ensure proper security when sharing sensitive, classified, or protected information.	E, F, I		

Emergency Operations Center (EOC) Skillset: Coordination and Individual Contribution

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

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

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. 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	Option: Code C IS-2200	
2. Maintain positive, calm demeanor to promote a positive work environment.	E, F, I		
3. Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.	E, F, I, J		
4. Comply with relevant health and safety requirements.	E, F, I		
5. Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.	C, E, F, I, T		
6. Participate in the EOC planning process.	E, F, I		
7. Participate in appropriate EOC meetings and briefings related to your assigned function.	E, F, I		
8. Follow general internal and external information flow processes: • Demonstrate knowledge of information management systems, such as incident management software	E, F, I		
9. 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		
10. Practice proper knowledge management processes and procedures: • File structures • Naming conventions • Archiving processes • Position logs	E, F, I		
11. Follow processes for resource requests, prioritization, deployment, tracking, reassignment, and demobilization.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Participate in orderly transition of resources and processes from response to recovery.	E, F, I		
13. 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		
14. Participate in EOC training and exercises.	E, F		
15. Participate in after action review and improvement planning.	E, F, I, T		

Emergency Operations Center (EOC) Skillset: Planning

Task Categories:
Reference pre-incident plans
Develop and write EOC action plans and other incident-specific plans
Disseminate plans
Facilitate the ongoing planning process

Task Category: **Reference pre-incident plans**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. 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		
2. Obtain additional plans or supporting documents, such as annexes and standard operating procedures, as necessary.	E, F, I		

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

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
4. Demonstrate knowledge of the EOC planning process: • Iterative action plan development • Development of other incident-specific plans	E, F, I, T		
5. 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		
6. Facilitate the assessment and revision of objectives and/or strategies to ensure that they align with desired outcomes.	E, F, I		
7. Establish communication with stakeholders to facilitate planning and problem-solving: • Understand and address stakeholder expectations • Incorporate nontraditional planning partners as necessary	E, F, I		
8. 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		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

Task Category: **Disseminate plans**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Provide plans to internal and external stakeholders for implementation and awareness.	E, F, I		
13. 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**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

Emergency Operations Center (EOC) Skillset: Safety Advising

Task Categories:
Promote the safety of EOC personnel

Task Category: **Promote the safety of EOC personnel**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Monitor weather and other external conditions that could affect EOC facilities and the availability of EOC personnel, and communicate protective actions.	E, F, I, J		
2. Communicate and support relevant health and safety requirements and procedures: • Brief EOC personnel on emergency procedures and safety guidelines • Spot-check operations to ensure compliance with safety requirements • Address EOC safety hazards and implement mitigation strategies	E, F, I		
3. Develop and provide facility safety plan and briefing: • Communicate locations of automated external defibrillators (AED), fire extinguishers, evacuation routes, and shelter-in-place areas	E, F, I, J		
4. Identify and inform EOC personnel about mental health resources.	E, F, I, J		

Evaluation Record Form

CANDIDATE NAME:
CANDIDATE POSITION:
Evaluation Record Number:
Evaluator's name:
Incident/office title and agency:
Evaluator's home jurisdiction address and phone:
Name and location of incident or simulation/exercise or job function:
Incident kind:
Number and kind of resources:
Evaluation period:
Position type:

Recommendation:
The above named candidate performed the initialed and dated tasks under my supervision. I recommend the following for this candidate's further development:
    The candidate has successfully performed all required tasks for the position. The AHJ should consider the individual for certification.
    The candidate could not complete certain tasks or needs additional guidance. See comments below.
    Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation.
    The candidate is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a candidate for this position.

Additional recommendations/comments:
Date:
Evaluator's initials:
Evaluator's relevant qualification:

Evaluation Record Form

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