



U. S. Coast Guard



Incident Command System Type 3

PLANNING SECTION CHIEF

Performance Qualification Standard Workbook



July 2023

Performance Qualification Standard (PQS) Workbook for PLANNING SECTION CHIEF (PSC3)

Overview

This Planning Section Chief Type 3 (PSC3) Performance Qualification Standard (PQS) workbook is the method for achieving the United States Coast Guard (USCG) Type 3 qualification for this Incident Command System (ICS) position. The USCG ICS qualification process has been established to comply with federally mandated requirements per the National Response Framework (6 U.S.C. § 320) and Homeland Security Presidential Directive – 5 (HSPD-5).

This workbook was developed to meet and/or exceed the standards set forth by the Federal Emergency Management Agency's (FEMA's) National Incident Management System (NIMS) Guideline for the National Qualification System (NQS). Alignment with these standards ensures confidence in the capabilities and interoperability of USCG personnel engaged in emergency and disaster response. It also enhances national preparedness by expanding the network of qualified incident management and support personnel who can be deployed nationwide.

The PSC3 PQS participant responsibilities and workbook components are detailed beginning on Page 2. Note that while many stakeholders are obligated to support the Trainee in completing the PQS workbook, earning the ICS qualification is ultimately the responsibility of the Trainee. The requirements listed in this workbook represent the minimum knowledge and skills necessary to perform in the Planning Section Chief position in a Type 3 incident or event.

The Office of Emergency Management and Disaster Response (CG-OEM) defines USCG ICS Program policy within the Emergency Management Manual (EMM) Volume IV: Incident Management and Crisis Response, COMDTINST M3010.24 (series). The ICS program's implementation is explained in the ICS Training Guide (for Type 3 qualifications) and the ICS Certification Board Guide (for Type 1 and Type 2 certifications). USCG ICS Program resources are located in the following locations:

- The ICS Library on Homeport at <http://homeport.uscg.mil/> (follow drop-down options from “Missions” tab to “Incident Management”)
- The ICS Program & Coordinator SharepointPage at: [CG-OEM - ICS Coordinators \(sharepoint-mil.us\)](#)

Trainees should direct questions to their local unit ICS Coordinator or to CG-OEM at ICS-ProgramCoordinator@uscg.mil.

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

RESPONSIBILITIES

1. The Trainee is responsible for:

- Seeking competency qualification guidance from the local unit ICS Coordinator.
- Reviewing, understanding, and adhering to the requirements in the PQS workbook.
- Completing all tasks required to earn the competency within three years. Tasks older than three years must be evaluated by the local unit ICS Coordinator and Verifying Officer(s).
- Participating in incidents / events / exercises / training / on-the-job training (OJT) necessary to garner the experience required to earn the competency sought.
- Engaging appropriate Verifying Officers for PQS workbook task evaluation.
- Assuring all ICS Experience Worksheets associated with task achievement are complete.
- Providing the ICS Coordinator with the finalized PQS workbook.
- Requesting and successfully completing an oral board.
- Ensuring earned competencies are documented in the Trainee's training record.
- Maintaining currency requirements for the competency once earned.

2. The ICS Coordinator (as supported by the Training Officer) is responsible for:

- Meeting with the Trainee and determining experience, qualifications, and desired goals.
- Issuing the current position-specific PQS workbook to the Trainee.
- Explaining the ICS PQS process to the Trainee as well as the Trainee's responsibilities.
- Helping the Trainee identify relevant training and experience-acquiring opportunities.
- Prioritizing the Trainee against all unit candidates for enrollment in USCG ICS courses (or the authorized equivalent) required to achieve the associated ICS competency or its prerequisite requirements. This includes submitting Electronic Training Requests (ETRs) in Direct Access (DA) using verbiage prescribed in the ICS Training Guide.
- Acquiring Qualifying Official approval for the list of Verifying Officers and the competencies for which they are eligible to verify completion of tasks outlined in this PQS Workbook.
- Tracking the Trainee's progress in acquiring the competency.
- Conferring with the Verifying Officer(s) concerning the Trainee's need to repeat any PQS tasks completed three (or more) years prior.
- Reviewing the Trainee's completed PQS workbook, assuring documentation is complete, all signatures complete, and collaborating with the Verifying Officer(s) to arrange an oral board.
- If required, issue an interim qualification letter when the Trainee is unable to secure required course enrollment and is otherwise PQS and oral board complete.
- Ensuring the Trainee's completed PQS workbook is routed to the Qualifying Official for signature.
- Verify the ICS competency is entered into Direct Access or the record management system appropriate for the Trainee.
- Assigning the Trainee to the unit Incident Management Team (IMT).

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

RESPONSIBILITIES

3. The Verifying Officer is responsible for:

- Being qualified in the competency (or supervisory competency) he or she is verifying.
- Providing entry in the Record of Verifying Officers section.
- Explaining task evaluation procedures and objectives to the Trainee.
- Observing, mentoring, and evaluating Trainee in the performance of PQS workbook tasks.
- Attesting to the Trainee's experience / performance on ICS Experience Worksheets.
- Documenting Trainee's successful completion of PQS workbook tasks.
- Conferring with the ICS Coordinator concerning the Trainee's need to repeat any PQS tasks completed three (or more) years prior.
- Recommending the Trainee for an oral board and/or serving on the Trainee's oral board as requested by the ICS Coordinator once PQS tasks are complete.

4. The Qualifying Official is responsible for:

- Assuming the Qualifying Official position as the unit's Commanding Officer (O-4 and above), first O-6 in the chain of command, COMDT (CG-OEM), or as delegated by these authorized personnel.
- Designating and supporting the unit Verifying Officers for each ICS competency.
- Providing qualification opportunities for Trainees to meet IMT/AC readiness requirements.
- Issuing proof of Trainee's qualification by signing the ICS Qualification Record in this PQS workbook or delegating this responsibility as appropriate.

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

ICS PQS WORKBOOK COMPONENTS

Competency Requirements: The Competency Requirements table provides a description of duties associated with the listed competency as well as prerequisite training, experience, licensure/certification, and the currency expected to maintain the competency qualification.

PQS Workbook Assignment: The PQS Workbook Assignment records when and to whom the PQS workbook was issued as well as the issuing unit/individual.

Record of Verifying Officers: Verifying Officers may be a single individual or, preferably, numerous individuals. The Record of Verifying Officers is a list of the Verifying Officers that validate tasks within the Trainee's PQS workbook including names, title, applicable ICS qualifications/certifications, and signature for ease of reference.

Tasks: Tasks are either knowledge or performance-based. Knowledge tasks can be completed through demonstration (noting the coordinating ICS Experience Worksheet in the Record # as applicable) or discussion. Performance tasks, however, must be demonstrated and should be documented on an accompanying ICS Experience Worksheet. All tasks have been divided into a knowledge or performance section and marked with a "K" or "P" in the task number accordingly. Performance tasks that must be completed more than once are noted with an asterisk (*). The asterisk notes that the designated task must be completed during two different incidents / events or during an exercise. A classroom exercise (e.g., 320, 420, or other IMT or position-specific course) can only be used once and the trainee must have specifically filled the PSC role to obtain credit. The trainee must have both occurrences recorded.

Task Code (TC): Task Codes (TCs) delineate the environment in which the Trainee must demonstrate task proficiency. At least one TC is designated for each PQS workbook task. If more than one TC is listed for a task, then the task may be completed on any **ONE** of the listed TC environments (i.e., if code 1, 2, and 3 are listed, then the task may be completed on either 1, 2, or 3). Some tasks are required to be demonstrated more than once and are accompanied by two TC boxes with accompanying Verifying Officer Signature fields. TCs are listed in the table below and again at the top of each workbook page listing PQS tasks for ease of reference.

Competency Code (CC): Competency Codes (CCs), evidenced by their associated behaviors, are the characteristics an individual performing in the competency are expected to demonstrate. These CCs ensure PQS workbook tasking is representative of the necessary competency skills and simultaneously assists Verifying Officers in interpreting the relevance of each individual task.

Record Number: A Record Number (Record #) is referencing specific ICS experience on the ICS Experience Worksheet, which documents the Trainee's participation in an ICS-related event including training, exercises, or real-world incidents. Each ICS experience should be listed sequentially on the ICS Experience Worksheet. The corresponding Record # is listed in the column task of the PQS workbook when applicable. Tasks may be completed without providing a Record # though supporting documentation is highly recommended to validate ICS experience and support the qualification process.

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

ICS PQS WORKBOOK COMPONENTS

ICS Experience Worksheet: An ICS Experience Worksheet is used to document all ICS experience in activations, drills, exercises, training, and on-the-job experience. The ICS Experience Worksheet is used universally for Type 3 PQS workbooks and Type 1 / Type 2 ICS certification applications. Every time an individual supports an ICS activation, then that individual should record the experience in an ICS Experience Worksheet. Supporting documentation may be added to the ICS Experience Worksheet including ICS 225-CG, letters of recognition, awards, or portions of the Incident Action Plan. These documents may be included in the “List attached supporting documentation” field and combined electronically with the ICS Experience Worksheet. The more detailed the historical record of a member’s performance the easier it will be to evaluate a person’s performance for ICS qualifications and certifications. The ICS Experience Worksheet is on the Homeport and CGPortal links listed in the introduction of this PQS workbook.

Performance Evaluation: While not required, it is encouraged that the Trainee’s performance be evaluated and documented on an ICS 225-CG Incident Personnel Performance Rating form by an eligible Verifying Officer or qualified individual. If utilized, this documentation should be retained with the completed PQS workbook and associated ICS Experience Worksheet.

Verifying Officer’s Signature: The Verifying Officer signs a task after the Trainee successfully demonstrates the ability to perform the numbered task and any bulleted items associated with it.

Record of Completion: The Record of Completion will be reviewed and filled-in by the ICS Coordinator to ensure all PQS workbook requirements have been satisfied prior to signing and routing the ICS Qualification Record to the Qualifying Official for signature.

ICS Qualification Record: The ICS Qualification Record is prepared by the ICS Coordinator to acknowledge that the Trainee has met all competency requirements and is capable of performing in the position. By signing the ICS Qualification Record, the Qualifying Official is awarding the Trainee the ICS competency indicated on the record. The ICS Qualification Record is expected to be routed electronically inside the completed PQS workbook for signature from the Qualifying Official. No additional qualification documentation is expected to be drafted or routed unless it is requested by the Qualifying Official. Once the competency is awarded, the Trainee (in collaboration with the ICS Coordinator) shall ensure the competency is recorded in DA or another appropriate system of record using the signed ICS Qualification Record as confirmation of the issued competency. The awarded competency is valid unless revoked by the Trainee’s/qualified individual’s current Commanding Officer (O-4 and above), first O-6 in the chain of command, or COMDT (CG-OEM).

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

TASKS		CODE (TC)
Task may be demonstrated in any environment (e.g., training, classroom, drill, exercise, simulation, incident, event, or standard job responsibilities).		6
Task must be demonstrated in an ICS course classroom.		5
Task must be demonstrated in on-the-job training, responsibilities, and/or experience.		4
Task must be demonstrated in an ICS-managed exercise.		3
Task must be demonstrated in a full-scale ICS-managed exercise.		2
Task must be demonstrated in an ICS-managed incident and/or event.		1
COMPETENCIES		CODE (CC)
SKILL	BEHAVIOR <i>(Include but are not limited to those listed.)</i>	
Adaptability	Modify actions/efforts as necessary; adjust to incident complexity.	A
Administrative Responsibilities	Ensure documentation is complete & disposition is appropriate; provide personnel evaluations.	B
Assignment Preparedness	Demonstrate readiness for assignment.	C
Collaboration & Coordination	Establish inclusive, effective, working relationships with personnel & stakeholders; coordinate interdependent activities; gain concurrence.	D
Communication	Disseminate & receive information; provide clear/concise messaging; express priorities/objectives/operations/expectations.	E
ICS Familiarity	Understand, employ, & comply with NIMS ICS principles/guidance; compliant with procedures, protocol, terminology, organizational structure, & chain of command.	F
Information Management	Participate in & support briefs appropriately; gather, produce, & distribute information per established guidelines; establish and/or follow media protocols.	G
Judgment & Decision-making	Determine effectiveness of effort, personnel & resources; make informed, accurate decisions; ensure legal & ethical compliance; ensure socio-economic, political, and cultural consideration; use pertinent analysis to make recommendations/set priorities that aid in meeting responsibilities/expectations/objectives.	H
Leadership & Supervision	Provide support; model leadership values/principles; establish & monitor work assignments & performance expectations.	I
Positional Competence	Knowledgeable of position reporting structure, plans, & procedures; apply appropriate policy, contracts, & agreements; employ technical skills & assessments; assume position & take appropriate action; produce desirable results; contributions help meet incident objectives.	J
Resourcefulness	Employ the right tools & resources; use networks to locate resources; use initiative to overcome challenges/meet objectives.	K
Safety, Well-being & Risk Management	Anticipate, recognize, & mitigate unsafe situations; ensure personnel safety/well-being; comply with safety requirements; apply appropriate risk-assessment measures & incorporate in decisions/actions.	L
Situational Awareness	Gather, apply, assess, & disseminate situational information.	M
Transition Management	Ensure effective personnel/resource transitions to and from the incident; maintain function, position, & response continuity.	N
Unity of Effort	Emphasize teamwork to achieve objectives.	O

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

PSC3 COMPETENCY REQUIREMENTS	
Description	<ul style="list-style-type: none"> • Works as a member of a General Staff. • Responsible for development of the Incident Action Plan. • Supervises the collection, processing, display, and dissemination of incident information. • Assists Operations Section Chief (OSC) in development of response strategies • Facilitates planning meetings and briefings. • Supervises the tracking of incident personnel and resources through the Resources Unit. • Assign personnel to ICS organizational positions as appropriate. • Oversees information management processes and plans, including the development and approval of the Information Management Plan. • Provides periodic predictions on incident potential. • Incorporates plans (e.g., traffic, medical, communication, and site safety) into the IAP. • Develops other incident supporting plans (e.g., salvage). • Keeps IMT apprised of any significant changes in incident status. • Oversees preparation and implementation of the Incident Demobilization Plan.
Training	<ul style="list-style-type: none"> • ICS-300 Intermediate ICS for Expanding Incidents <u>and</u> • ICS-400 Advanced ICS <u>and</u> • ICS-440 Planning Section Chief course <u>or</u> • E/L 0962 All Hazards Planning Section Chief
Prerequisite Qualifications	<ul style="list-style-type: none"> • ICS Activation and Deployment • Recommended Qualification <ul style="list-style-type: none"> ○ Situation Unit Leader (SITL) <u>or</u> ○ Resource Unit Leader (RESL) <u>or</u> ○ Environmental Unit Leader (ENVL) <u>or</u> ○ Documentation Unit Leader (DOCL) <u>or</u> ○ Marine Transportation System Recovery Unit Leader (MTSL) <u>or</u> ○ Demobilization Unit Leader (DMOB)
PQS Workbook	<ul style="list-style-type: none"> • PSC3 PQS workbook completion
Experience	<ul style="list-style-type: none"> • Served as PSC in a drill, exercise, or actual response <i>(Perform as PSC a minimum of two times)</i>
Professional / Technical Licenses and Certifications	N/A
Currency	According to the ICS Training Guide

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

ICS-440 PLANNING SECTION CHIEF TRAINING PERFORMANCE & ENABLING OBJECTIVES	
<p>The ICS-440 Planning Section Chief (PSC) course is a four-day position-specific course designed to prepare the student to accomplish the duties and responsibilities on a Type 2 or 3 incident. This course concentrates on preparing prospective PSCs to perform in this position. Subjects covered include: Preparing for deployment, Readiness for Operational Tasking, Managing Personnel, Managing Information Processes, Supporting the Planning Process, Facilitating the Planning Process, and Demobilization.</p>	
1.0 Major Tasks and Activities	<p>Describe the major tasks required of the PSC when supporting an all-hazards incident or event.</p> <ul style="list-style-type: none"> • Identify the major functions and tasks common to the PSC position. • Describe the function of the units within the Planning Section.
2.0 Ready for Operational Tasking	<p>Demonstrate readiness for operational tasking.</p> <ul style="list-style-type: none"> • Identify the PSC's roles and responsibilities. • Describe how to assess an incident. • Describe the communication and coordination with the Command and General Staff.
3.0 Personnel Management	<p>Develop procedures to manage Planning Section personnel.</p> <ul style="list-style-type: none"> • Explain factors that influence section staffing. • Explain PSC's role in supporting section personnel. • Develop a Planning Section Standard Operating Guide.
4.0 Managing the Incident Information Process	<p>Develop a course of action to manage incident information processes.</p> <ul style="list-style-type: none"> • Explain the ways the PSC manages incident information. • Discuss the interaction between the OSC and PSC.
5.0. Meeting Facilitation and Presentation	<p>Facilitate an ICS meeting.</p> <ul style="list-style-type: none"> • Present tactical and situational information • Review meeting agendas • Prepare for meeting by ensuring room is set up properly and materials are ready. • Ensure meeting attendees are prepared.
6.0 Initial Unified Command / Objectives Meetings	<p>Draft incident objectives.</p> <ul style="list-style-type: none"> • Discuss how initial incident command/unified command meeting products affect the PSC. • Discuss how objective meeting products affect the PSC. • Explain the PSC's role in the Initial IC/UC Meeting and UC objectives meeting. • Discuss the criteria and methods for objective writing • Develop initial Command Direction products for UC. • Facilitate initial IC/UC Meeting and UC Objectives Meeting.
7.0 Command and General Staff Meeting	<p>Conduct a Command and General Staff Meeting.</p> <ul style="list-style-type: none"> • Discuss the impact of the command and general staff on the PSC. • Explain the PSC's role in these meetings • Explain key staff members' roles at this meeting. • Conduct a Command and General Staff Meeting.

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

<p>8.0 Preparing for a Tactics Meeting</p>	<p>Prepare for a Tactics Meeting.</p> <ul style="list-style-type: none"> • Discuss the function of the ICS 234-CG Work Analysis Matrix. • Explain uses of contingency strategies. • Discuss the difference between objectives, strategies, and tactics. • Discuss the function of the ICS 215-CG Operational Planning Worksheet. • Discuss the pre-tactics meeting risk analysis. • Discuss the operations organization chart. • Describe the purpose of a strategic plan, contingency plans, and long-range plans.
<p>9.0 Tactics Meeting</p>	<p>Conduct a Tactics Meeting.</p> <ul style="list-style-type: none"> • Discuss the purpose of a Tactics Meeting. • Discuss the PSC’s responsibilities at these meetings. • Explain the responsibilities of the other attendees at these meetings. • Critique a tactics meeting demonstration.
<p>10.0 Planning Meeting</p>	<p>Conduct a Planning Meeting.</p> <ul style="list-style-type: none"> • Explain the Planning Meeting’s purpose. • Discuss the PSC’s responsibilities at the Planning Meeting. • Explain responsibilities of other attendees at these meetings. • Critique a Planning Meeting demonstration.
<p>11.0 Incident Action Plan Development</p>	<p>Develop key components of an Incident Action Plan (IAP).</p> <ul style="list-style-type: none"> • Identify the components of an IAP. • State the purpose of the IAP. • State when a written IAP is required. • Discuss the IAP development process. • Discuss the inclusion of IAP support material. • Validate the accuracy of the information in the IAP. • Discuss the IAP approval process.
<p>12.0 Operations Briefing and Debriefing</p>	<p>Conduct an Operation Briefing.</p> <ul style="list-style-type: none"> • Discuss the purpose of the Operations Briefing. • State who should attend this meeting. • Discuss actions taken by key presenters. • State the purpose of operational debriefings.
<p>13.0 The Demobilization Process</p>	<p>Coordinate the development of a demobilization plan.</p> <ul style="list-style-type: none"> • Describe the PSC’s responsibilities with regards to demobilization. • Discuss the cooperation required of the PSC to develop a Demobilization Plan. • Discuss the responsibilities of the PSC in the Demobilization Plan’s execution. • Complete the ICS 225-CG Incident Personnel Performance Rating Form.

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

PQS WORKBOOK ASSIGNED TO:
TRAINEE'S NAME:
UNIT:
PHONE NUMBER:
E-MAIL:

PQS WORKBOOK INITIATED BY:
OFFICIAL'S NAME:
TITLE:
UNIT:
PHONE NUMBER:
E-MAIL:

PQS WORKBOOK WAS INITIATED AT:
UNIT/LOCATION:
DATE:

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

RECORD OF VERIFYING OFFICERS				
DATE	TITLE	VERIFYING OFFICER'S NAME	ICS QUAL(S)/ CERT(S)	SIGNATURE

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

KNOWLEDGE TASKS				
TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
K-1. Explain the role and responsibilities of the Planning Section Chief including responsibilities at each stage in the Planning P.	6	C F J		
K-2. Explain the duties of each position within the Planning Section: a) Situation Unit Leader b) Resource Unit Leader c) Documentation Unit Leader d) Environmental Unit Leader e) Marine Transportation System Recovery Unit Leader f) Demobilization Unit Leader g) Technical Specialists h) Display Processor i) Check-in/Status Recorder j) Field Observers k) Lesson Learned Collection Manager	6	C F J		
K-3. Identify the meetings facilitated by the Planning Section Chief and explain the purpose of each meeting. a) Discuss who attends each meeting. b) Explain the purpose of the meeting agendas.	6	C F J		
K-4. Identify the ICS forms used to develop an Incident Action Plan (IAP) and explain the purpose of each form.	6	C F J		
K-5. Explain the purpose and function of the ICS 209-CG (Incident Status Summary).	6	C F J		

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
K-6. Identify agency / local / regional / national plans, policies, resources, and/or mutual aid agreements that may be utilized during an ICS-managed response for the purpose of ensuring lawful compliance, effective response, and unity of effort.	6	C J K		
K-7. Explain how to gather information and assess to determine immediate needs and actions related to a) Incident complexity / conditions b) Potentially hazardous situations c) Current response status / resources d) Expected duration e) Local geography / terrain / weather	6	H J M		
K-8. Discuss the importance and implications of understanding the following: a) Jurisdiction b) Natural resource / cultural concerns c) Local policies, standards, guidelines d) Priorities e) Limitations / constraints f) Political environment g) Fiscal parameters	6	H J M		
K-9. Describe the process for establishing and staffing the appropriate ICS functions/staff considering: a) Urgency b) Safe and efficient operations c) Response resources / types d) Operational planning periods	6	F J		

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
K-10. Explain how to establish or evaluate incident facilities including the Incident Command Post (ICP), Staging Area, JIC, and other facilities.	6	F H J		
K-11. Explain what an Information Management Plan is and identify when an Information Management Plan may be needed to support an incident.	6	F J		
<p>K-12. Identify the reasons and persons responsible for developing contingency and/or supplemental plans that could include:</p> <ul style="list-style-type: none"> a) Evacuation / Sheltering Plan b) Salvage Plan c) Lightering Plan d) Dive Plan e) Decontamination Plan f) Demobilization Plan g) Transfer of Command Plan 	6	A F K M		
K-13. Discuss agency policy, priorities, limitations/constraints, and political and environmental considerations when developing an IAP and supporting plans.	6	F J		
K-14. Discuss how you can promote an inclusive working environment as well as command and general staff cohesion particularly during complex or extended responses.	6	D I		

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
<p>K-15. Explain the risk management process and how it is utilized in an incident. Consider the following:</p> <ul style="list-style-type: none"> a) Role of the SOFR. b) Site Safety Plan (ICS 208-CG). c) Safety messages. d) Implementing procedures to recognize potentially hazardous situations. 	6	F L		
<p>K-16. Describe the function of the Open Action Tracker Worksheet (ICS 233-CG).</p>	6	B F J		
<p>K-17. Discuss how to monitor personnel for mental and/or physical fatigue and what methods can be implemented to address these concerns including work/rest ratio and Critical Incident Stress Management (CISM).</p>	6	H I L M		
<p>K-18. Discuss the following components in maintaining situational awareness and how they may influence ICS management decisions:</p> <ul style="list-style-type: none"> a) IAP effectiveness b) Incident complexity c) Hazards/safety d) Values to be protected e) Communications f) Logistical considerations g) Span of control h) Alternative strategies i) Weather / modeling predictions 	6	A H I K M		

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
K-19. Explain special incident conditions, existing or predicted, that would require technical expertise and identify roles of key technical specialists.	6	H K L M		
K-20. Discuss available sources of information to determine when and how to demobilize personnel and equipment.	6	F J		
K-21. Discuss who needs to receive a copy of the final of Demobilization Plan.	6	F J		
K-22. Explain the importance of the ICS 225-CG from both an individual and organizational perspective.	6	F J		
K-23. Explain how to implement a plan for a transfer of command.	6	F J N		

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

PERFORMANCE TASKS				
TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-1*. Serve as a Planning Section Chief for an incident.	6	C J		
	3			
	2 1			
P-2*. Demonstrate the ability to implement appropriate staffing of Planning Section units required for an incident using: a) USCG personnel b) OGA personnel c) Private Sector d) Technical Specialists	6	C F I J		
	3			
	2 1			
P-3. Participate in an initial briefing from immediate supervisor and / or Incident Commander. Demonstrate awareness of: a) Incident information b) ICS-201-CG, Incident Briefing c) Situation Analysis or Contingency Plan d) Map / chart of the incident. e) Organizational structure (unified command or single organization) f) Resources assigned, enroute and on order g) Facilities established and operating h) Anticipated incident duration, size, and type i) Current Resource Requests and resources assigned to incident j) Key contact list with phone and fax numbers	6	E F		

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-4*. Draft / review and revise incident objectives for the Incident Commander / Unified Command (IC/UC).	6	D F J		
	3 2 1			
P-5*. Build an organization which will meet and support incident / tactical objectives. a) Assign personnel with the appropriate skills / qualifications. b) Delegate duties to staff. c) Establish organization / team roles and responsibilities. d) Manage unstaffed functional areas. e) Organize assigned resources. f) Determine additional resource needs.	6	F H I J		
	3 2 1			
P-6*. Demonstrate how to properly setup a meeting space. Ensure the space is well organized and required resources are in place prior to meetings. <i>(See PSC Job aid for meeting layout).</i>	6	D F I J		
	3 2 1			
P-7. Evaluate and adjust personnel assignments as necessary based on changing conditions / complexities.	3 2 1	A I M		

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-8*. Demonstrate how to facilitate a Command and General Staff Meeting after obtaining a briefing from Incident Commander. a) Incident Commander's priorities, goals, and objectives for IMT and the incident. b) Instructions concerning the tasks expected of the Operations Section. c) Expected timeframes for briefings, planning meetings, and team meetings.	6	D E J		
	3			
	2 1			
P-9. Ensure appropriate span of control is maintained throughout the ICS organizational structure by addressing when it is exceeded.	6	F H I J		
P-10. Ensure resource check-in and accountability processes are established.	6	F J		
P-11*. Demonstrate how to establish and maintain positive interpersonal and interagency working relationships. a) Identify appropriate Federal, State, Local, Tribal, and Territorial agencies, private industry, and non-government organizations. b) Command and General Staff.	6	D E H J O		
	3			
	2 1			
P-12*. Demonstrate how to facilitate a UC Objectives Meeting.	6	D E J		
	3			
	2 1			

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-13*. Perform the tasks and coordination required to ensure the participants are prepared for the Tactics Meeting.	6	D E J		
	3 2 1			
P-14*. Facilitate the Tactics Meeting and demonstrate the ability to work with the Operations Section Chief to coordinate meeting activities that result in the successful completion of required ICS-215-CG and supporting documents.	6	D E J		
	3 2 1			
P-15*. Demonstrate how to properly facilitate the Planning Meeting.	6	D E J		
	3 2 1			
P-16*. Demonstrate the ability to prepare an Incident Action Plan for Command approval. a) Ensure all applicable incident documentation is completed as required by the incident. b) Review draft IAP for completeness and submit to Incident Commander for approval.	6	D E J		
	3 2 1			

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TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-17*. Demonstrate the ability to properly complete and review applicable incident documentation is completed as required by the incident. Examples include: a) ICS 209-CG (Incident Status Summary) b) ICS 214-CG (Activity Log) c) ICS 213RR-CG (Resource Request) d) ICS 225-CG (Incident Personnel Performance Rating) e) ICS 233-CG (Open Actions Tracker)	6	B F J		
	3 2 1			
P-18*. Demonstrate how to properly facilitate the Operations Briefing.	6	D E J		
	3 2 1			
P-19*. Implement a performance evaluation system and continuously evaluate personnel performance ensuring the following: a) Communicating expectations. b) Taking immediate corrective actions with deficiencies. c) Providing professional development opportunities. d) Issuing formal feedback using ICS 225-CG Incident Personnel Performance Rating Forms.	6	B E F I		
	3 2 1			
P-20. Communicate the expectation that ICS organizational functions / resources implement methods of collaboration to enhance ICS processes and incident response.	5 3 2 1	D E G O		

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TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-21*. Ensure information sharing exists by preparing for and participating in internal and external briefs with appropriate stakeholders: a) Governmental leadership b) Response agencies c) Media and VIPs d) Private land owner(s) e) Vessel and facility owner(s) f) Non-Governmental Organizations g) Volunteers h) Private Sector entities i) Trustees (e.g. Tribal or DOI)	6	D G I O		
	3 2 1			
P-22. Demonstrate how to brief the IC/UC on Critical Information Reporting Requirements (CIRs).	5 3 2 1	D E G L		
P-23. Draft an Operating Guide for the Planning Section.	5 3 2 1	F J		
P-24. Assign tasks to subordinate staff, monitor status, and assist the IC/UC with holding personnel accountable using the Open Action Tracking Worksheet (ICS 233-CG).	5 3 2 1	B D E I		
P-25. Demonstrate how to evaluate and share incident information as appropriate within the chain of command and across functional areas.	3 2 1	E F H J		

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PLANNING SECTION CHIEF (PSC3)**

TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-26*. Ensure planning staff completes or supports completion of other relevant plans within required timeframes. a) Evacuation Plan b) Salvage Plan c) Lightering Plan d) Dive Plan e) Decontamination Plan f) Transfer of Command Plan g) Contingency plan(s) as needed (evacuation / sheltering, protection)	6	E G H		
	3			
	2			
	1			
P-27. Ensure Planning Section Staff are adhering to work/rest guidelines and length of assignments; make adjustments as needed.	6	A E G H		
P-28. Identify safety hazards and mitigation strategies with the Safety Officer (SOFR).	3 2 1	E G L M		
P-29. Ensure safety considerations are integrated into all aspects of incident planning including: a) Site Safety Plan (ICS 208-CG) b) Work Safety Analysis (ICS 215A-CG) c) Safety messages and briefings	3 2 1	E G L		
P-30. Recognize potentially hazardous situations, determine appropriate safety measures, apply Risk Management, and ensure assigned personnel follow incident safety guidelines. a) Site Safety Plan (ICS-208-CG) b) GAR Model c) Safety messages d) Work / rest guidelines	3 2 1	E G L		

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TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-31*. Review IAP for completeness (including accuracy and timeliness), approve, and ensure appropriate distribution / implementation.	6	B F G		
	3 2 1	J O		
P-32*. Evaluate and monitor current situation to determine if present plan of action will meet incident objectives. Advise command and general staff of significant changes in incident status and ensure you or your staff update display/s in a timely manner.	6	D E G		
	3 2 1	J		
P-33. Prepare incident demobilization plan within established time frames. a) Consult with OSC, RESL, LOFR / Agency reps, and LSC. b) Draft release priorities c) Collect demobilization guidelines from agencies and / or coordination center (e.g., work, rest, communication, and travel guidance).	5 3 2 1	F J		
P-34. Submit Demobilization plan to Incident Commander for approval. Make changes as directed.	5 3 2 1	D E G J		
P-35. Implement demobilization plan. a) Ensure realistic release priorities. b) Address agency, cooperating / assisting agency and incident requirements. c) Minimize contract, response, and personnel costs. d) Ensure incident and agency demobilization safety and travel procedures are followed.	5 3 2 1	E G I O		

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TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
<p>P-36. Work with the IC/UC and other Section Chiefs to promote the efficient management of incident resources by:</p> <ul style="list-style-type: none"> a) Identifying excess and critical resources early in the incident. b) Determining demobilization priorities. c) Developing and distributing the Demobilization / Transition Plan prior to the release of resources. d) Ensure Command and ICS staff are briefed on demobilization procedures and responsibilities. 	<p>3 2 1</p>	<p>G H M N O</p>		
<p>P-37. Maintain appropriate records and submit complete documentation to the Documentation Unit Leader (DOCL).</p>	<p>3 2 1</p>	<p>B N</p>		
<p>P-38. Demonstrate a complete relief process.</p> <ul style="list-style-type: none"> a) Inform assigned resources and command staff. b) Prepare ICS 225-CG evaluations for all staff. c) Submit your ICS-225-CG to your supervisor for review and performance feedback. d) Document follow-up action needed and submit to supervisor. 	<p>5 3 2 1</p>	<p>G H M</p>		
<p>P-39. Facilitate organization closeout, After-Action Reviews (AARs), and Lessons Learned as required for the purpose of:</p> <ul style="list-style-type: none"> a) Sharing findings and recommendations. b) Identifying strengths and weaknesses. Providing commendations and recommendations. 	<p>3 2 1</p>	<p>E G N O</p>		

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TASK	TC	CC	RECORD #	VERIFYING OFFICER'S SIGNATURE
P-40. Demonstrate understanding and awareness of incident complexity (escalation / de-escalation) and impact on Planning Section.	3 2 1	A F H		
P-41. Demonstrate how to interact and coordinate with command staff, general staff and appropriate unit leaders. a) Receive and transmit current and accurate information. b) Communicate changes to the Incident Action Plan (IAP) or relevant plans. c) Ensure the Resource Unit Leader is advised of changes in status of resources assigned to the operation. Keep status current.	3 2 1	D E I J		
P-42. Participate in debrief of off-going ops personnel to evaluate IAP effectiveness.	3 2 1	F J N		
P-43. Participate in post event briefings and meetings. Facilitate as required by Incident Commander(s). a) Hotwash b) After-Action Meeting	3 2 1	E J		
P-44. Assist in developing an After-Action Report (AAR) for an incident or exercise.	3 2 1	B J		

* *The asterisk notes that the designated task must be completed during two different incidents / events or during an exercise. A classroom exercise (e.g., 320, 420, or other IMT or position-specific course) can only be used once and the trainee must have specifically filled the PSC role to obtain credit. The trainee must have both occurrences recorded.*

**Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)**

PSC3 RECORD OF COMPLETION		
COMPETENCY REQUIREMENTS	DATE	ICS COORDINATOR'S SIGNATURE
<p>A. Completion of Training Courses:</p> <ul style="list-style-type: none"> <input type="checkbox"/> ICS-300 Intermediate ICS for Expanding Incidents <u>and</u> <input type="checkbox"/> ICS-400 Advanced ICS Course, <u>and</u> <input type="checkbox"/> ICS-440 Planning Section Chief Course <u>or</u> <input type="checkbox"/> E/L 0962 All Hazards Planning Section Chief 		
<p>B. Completion of Prerequisite Qualifications by the USCG or another agency:</p> <ul style="list-style-type: none"> <input type="checkbox"/> ICS Activation and Deployment <u>and</u> <p><u>Recommended – Not Required</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Situation Unit Leader (SITL) <u>or</u> <input type="checkbox"/> Resource Unit Leader (RESL) <u>or</u> <input type="checkbox"/> Documentation Unit Leader (DOCL) <u>or</u> <input type="checkbox"/> Environmental Unit Leader (ENVL) <u>or</u> <input type="checkbox"/> Marine Transportation System Recovery Unit Leader (MTSL) <u>or</u> <input type="checkbox"/> Demobilization Unit Leader (DMOB) 		
<p>C*. Verification of Prerequisite Experience:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Served as PSC in a drill, exercise, or actual response or assigned as PSC on an IMT. 		
D. Verification of Professional / Technical Licenses and Certifications:	N/A	N/A
E. Completion of PSC3 PQS workbook tasks.		
F. Satisfactory completion of oral board.		
<p>F.1. Oral board composition: <i>List each board member by Rate/Rank, Name, and Unit.</i></p>		
G. Signed and electronically routed appropriate documentation to Qualifying Official.		

Performance Qualification Standard (PQS) Workbook for
PLANNING SECTION CHIEF (PSC3)



U.S. COAST GUARD
ICS QUALIFICATION RECORD



THIS PAGE VERIFIES TRAINEE'S QUALIFICATION IN THE COMPETENCY OF
PLANNING SECTION CHIEF (PSC3)

TRAINEE: _____ RATE/RANK: _____ EMPLID: _____

ICS COORDINATOR'S RECOMMENDATION

I verify _____ has satisfactorily completed all competency requirements, has demonstrated the capability to perform in the position of Planning Section Chief Type 3, and is thereby recommended for qualification.

ICS COORDINATOR

NAME: _____ RATE/RANK: _____ UNIT: _____

EMAIL: _____ PHONE: _____

SIGNATURE: _____ DATE: _____

**QUALIFYING OFFICIAL'S ISSUANCE OF
U. S. COAST GUARD ICS QUALIFICATION**

I affirm _____ has met all competency-related requirements and is now issued the Planning Section Chief Type 3 qualification. The Trainee is hereby authorized and confirmed capable of assuming this position-specific role in a Type 3 incident or event and carrying out the position responsibilities as detailed in the U.S. Coast Guard Incident Management Handbook, COMDTPUB P3120.17 (series) and the National Qualification System (NQS). This qualification meets and/or exceeds National Incident Management System (NIMS) standards. It is valid unless revoked.

QUALIFYING OFFICIAL

NAME: _____ RATE/RANK: _____ UNIT: _____

EMAIL: _____ PHONE: _____

SIGNATURE: _____ DATE: _____

This ICS Qualification Record shall be provided to the Trainee's Administrative Office or appropriate equivalent to enter the awarded competency in the correct system of record. Trainee is responsible for maintaining competency currency per CG-OEM's ICS Training Guide.