

## Part Two

### Planning/Intelligence Section Annex

## Part Two, Planning/Intelligence Section Annex Contents

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## [Planning/Intelligence Section Annex Checklists](#) [General](#)

### **Purpose**

The purpose of this section is to provide disaster-related data and information both internally and externally to assist in managing the disaster.

### **Overview**

Planning/Intelligence is responsible for coordinating the collection, evaluation and dissemination of information; developing the action plan in coordination with the other sections and maintaining documentation relating to the disaster. Two concepts of the NIMS and the National Response Framework are essential to the Planning/Intelligence function:

- **Situational awareness:** requires continuous monitoring of relevant sources of information regarding actual and developing incidents in order to maintain the big picture and to think or plan ahead.
- **Common Operating Picture (COP):** collection and dissemination of incident information to all appropriate parties.
  - Allows on-scene and off-scene personnel to have the same information about the incident, including the availability and location of resources and the status of assistance requests.
  - All responding entities have the same understanding and awareness of incident status and information when conducting operations.

### **Objectives**

Objectives of the Planning/Intelligence Section are:

- Gather, process, organize, maintain and share with all concerned organizations in a timely manner the following:
  - Disaster information.
  - Response and recovery activities.
  - Damage assessment information.
- Conduct briefings and meetings and prepare the EOC Action Plan for each operational period.
- Develop post-incident reports—After Action Report/Improvement Plan (AAR/IP).
- Compile and report disaster information in a timely manner to the various EOC sections; City departments; the Los Angeles County Operational Area and other appropriate agencies, such as the Disaster Management Area Coordinators, American Red Cross, etc.
- Document and preserve all records of the response and recovery efforts.

### **Concept of Operations**

The Planning/Intelligence Section will operate under the following policies during a disaster as the situation dictates:

- The Standardized Emergency Management System (SEMS) and the National Incident Management System (NIMS) will be followed.
- All on-duty personnel are expected to remain at work until relieved of duty. Off-duty personnel will be expected to return to work in accordance with the City's policies.
- While in a disaster mode, work shifts typically will be 12 hours on and 12 hours off for the duration of the event. The City's work shifts will typically begin at 8 a.m. and 8 p.m. The length of the work shifts may be adjusted to meet local conditions.

**Modified EOC Planning P Process for Action Planning (CW-#42)**

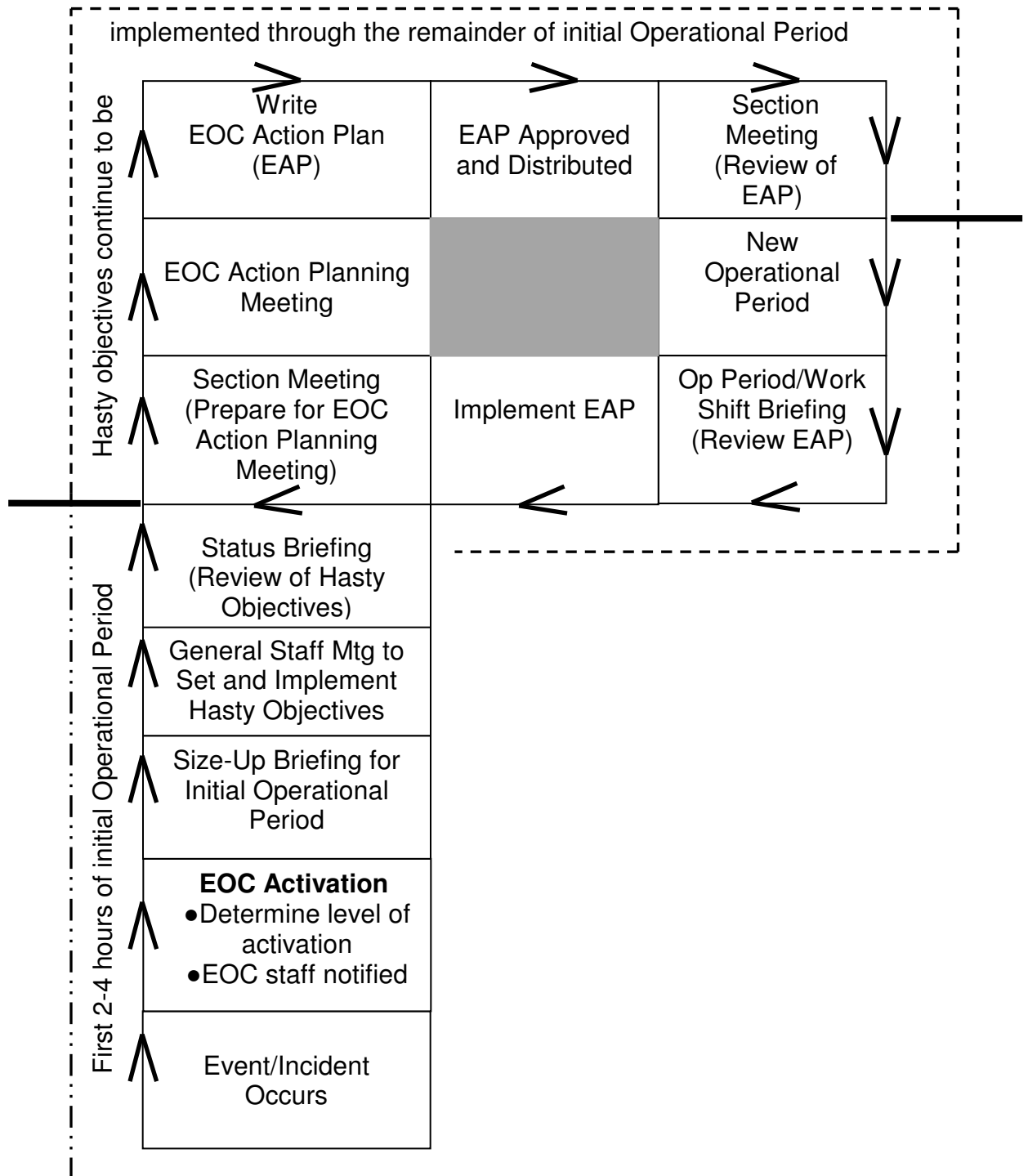
The Planning P was developed by the U.S. Coast Guard as a simple but thorough process that provides flexibility to address both smaller, short-term incidents/events, and longer, more complex incidents, resulting in a more effective use of resources, improved strategies and tactics, fewer safety hazards, lower incident costs and overall improved management. This Modified EOC Planning P is a useful tool to assist in the EOC Action Planning process. When the event or incident occurs, the Modified EOC Planning P process involves the following:

- Evaluation of the situation.
- Development of a management strategy.
- Identification and coordination of resources necessary to achieve the objectives in the safest, most efficient and cost-effective manner.

The Modified EOC Planning P Chart and checklist for the Modified EOC Planning P process follows:

*Note: The Modified EOC Planning P process for Action Planning is in the Planning/Intelligence Supporting Documents. Recognition is given to the City of Los Angeles Emergency Management Department for sharing their Planning P process for their EOC.*

Modified EOC Planning P  
Multiple Operational Periods



## **Modified EOC Planning P – EOC Action Planning Checklist**

### **Incident/Event Occurs**

#### **First 2-4 Hour Period:**

- Determine level of EOC activation
- Notify appropriate EOC staff
- Activate EOC
- Conduct Size-up Briefing for Initial Operational Period
- Conduct General Staff Meeting to Set and Implement Hasty Objectives
- Conduct Status Briefing
  - Review Hasty Objectives

Note: Hasty Objectives continue to be implemented through the remainder of initial Operational Period

#### **Ongoing Operational Periods:**

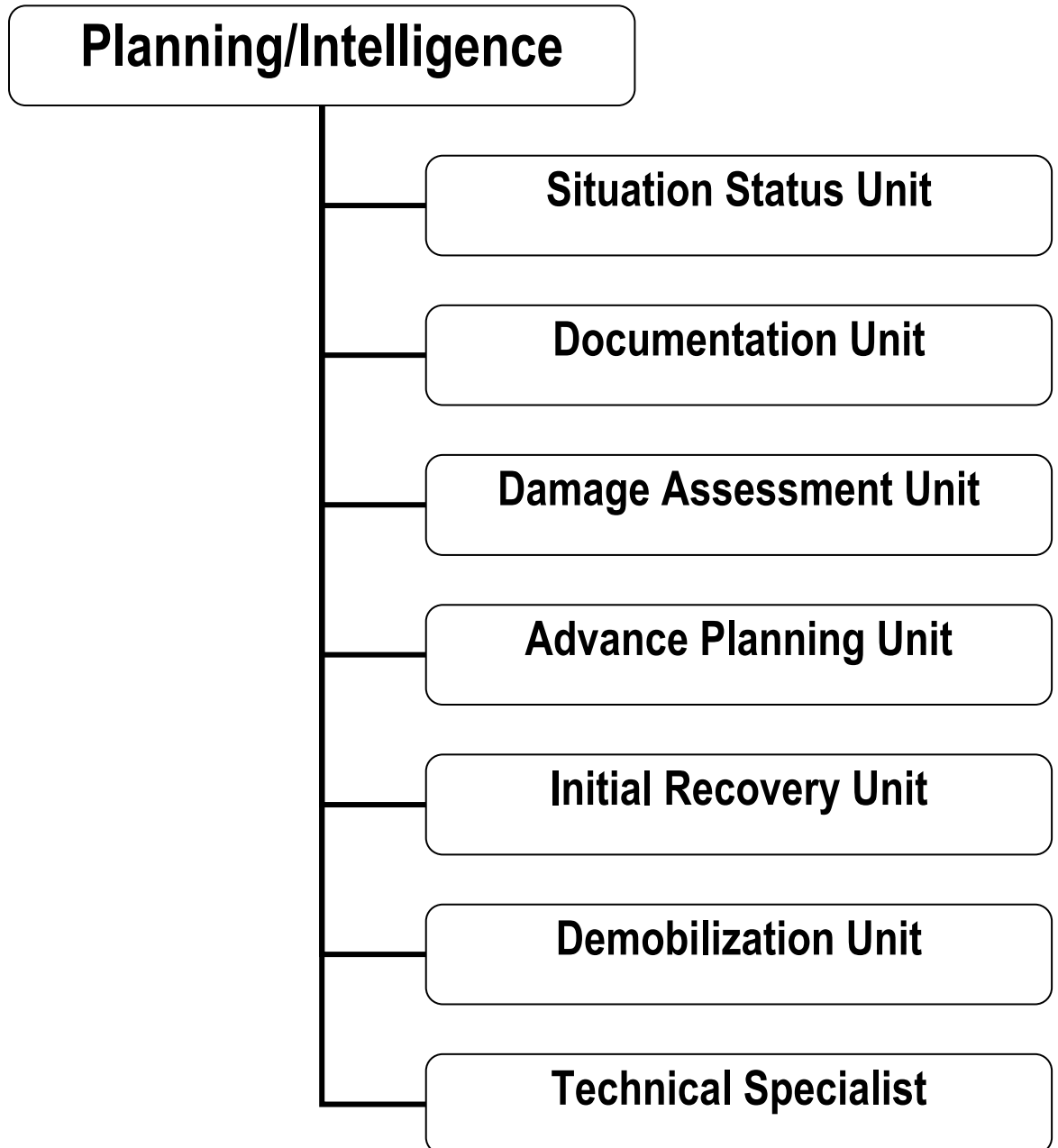
- Conduct Status Briefing
  - Review Objectives
- Conduct Section Meetings to prepare for EOC Action Planning Meeting
- Conduct EOC Action Planning Meeting
- Prepare draft EOC Action Plan (EAP)
- Obtain EAP modifications from Section Coordinators and modify EAP
- Obtain Approval of EAP and distribute EAP
- Conduct Section Meeting to review EAP

#### **New Operational Periods:**

- Op Period/Work Shift Briefing to review EAP
- EOC Op Period/Shift Change
- Implement EAP

*Note: The Modified EOC Planning P Process for EOC Action Planning is in the Planning/Intelligence and other Section Supporting Documents.*

Planning/Intelligence Section Organization and Functions



## **Planning/Intelligence Section Staff**

The Planning/Intelligence Section Coordinator will activate the units necessary to achieve stated objectives. The following Units may be established:

- Situation Status Unit
- Documentation Unit
- Damage Assessment Unit
- Advance Planning Unit
- Initial Recovery Unit
- Demobilization Unit
- Technical Specialist

### **Planning/Intelligence Section Coordinator**

The Planning/Intelligence Section Coordinator:

- Supervises the Planning/Intelligence Section.
- Serves as a member of the EOC Director's General Staff.
- Is responsible for the collection, evaluation, forecasting, dissemination and use of information related to the incident.
- Develops the EOC Action Plan.

### **Situation Status Unit**

The Situation Status Unit is responsible for the collection and organization of incident status and situation information. The Unit is also responsible for the evaluation, analysis and display of information for use by EOC staff.

### **Documentation Unit**

The Documentation Unit is responsible for:

- Initiating and coordinating the preparation of the City's EOC Action Plans.
- Maintaining accurate and complete incident files, including EOC messages.
  - Files should include photographic documentation of damage assessment.
- Providing copying services to EOC personnel.
- Preserving incident files for legal, analytical and historical purposes.
- Post event responsibilities include preparation of, obtaining approval and dissemination of the AAR/IP.

Note: A sample chart showing the Information Processing in the EOC is contained in the Planning/Intelligence Supporting Documents.

### **Damage Assessment Unit**

The Damage Assessment Unit is responsible for maintaining detailed records of safety/damage assessment information and supporting the documentation process.



### **Advance Planning Unit**

The Advance Planning Unit is responsible for developing reports and recommendations for future time periods (24 to 72 hours) and for preparing reports and briefings for use in strategy and/or planning meetings.

### **Initial Recovery Unit**

The Unit is responsible for:

- Monitoring and reporting on the status of the city infrastructure and other vital community and city services (i.e., banking, grocery stores, gas stations, etc.).
- Preparing the EOC to transition to a city/community-wide recovery organization.

### **Demobilization Unit**

The Demobilization Unit is responsible for preparing a Demobilization Plan to ensure an orderly, safe and cost-effective release of personnel and equipment.

### **Technical Specialist**

Technical Specialists are advisors with special skills needed to support a task not addressed elsewhere or by any other discipline. Technical Specialists (which may or may not be an employee of a public or private agency) may report to the Section Coordinator; may function within an existing unit such as the Situation Status Unit; form a separate unit if required or be reassigned to other parts of the organization, i.e. Operations, Logistics, or Finance/Administration.

<b>PLANNING/INTELLIGENCE SECTION COORDINATOR CHECKLIST</b>
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**Primary–A Shift:** Member of the Emergency Response Committee

**1<sup>st</sup> Alternate–A Shift:** Member of the Emergency Response Committee

**Primary–B Shift:** Member of the Emergency Response Committee

**1<sup>st</sup> Alternate–B Shift:** Member of the Emergency Response Committee

### **Primary Responsibilities:**

- Supervise the Planning/Intelligence Section.
- Collect, evaluate, forecast, disseminate and use information related to the incident. (CW-#42)
- Track and record the disaster incidents.
- Produce and approve various reports.
- Conduct the EOC Action Planning meetings and oversee the production of the approved Action Plans. (CW-#42)
- Be sure that the Section EOC Action Plan objectives are met.
- Post event responsibilities include overseeing the development of the After Action Report/Improvement Plan (AAR/IP).

### **Start Up:**

- Check in upon arrival at the EOC.
- Determine EOC assignment.
- Print your name on the EOC organization chart.
- Put on the vest with your title.
- Obtain a briefing on the situation.
- Obtain a copy of the current EOC Action Plan (not available at initial EOC activation).
- Determine your work location and set up as necessary.
- Review your position responsibilities.
- Begin documenting events and activities

## PLANNING/INTELLIGENCE SECTION COORDINATOR CHECKLIST

### Assignments/Staffing:

- Report to the EOC Director.
- Clarify issues regarding your authority and assignment.
- Confirm that all needed Section personnel are in the EOC or have been notified.
- When personnel arrive, assign and staff Section positions as needed for:
  - Situation Status Unit
  - Documentation Unit
  - Damage Assessment Unit
  - Advance Planning Unit
  - Recovery Planning Unit
  - Demobilization Unit
  - Technical Specialists as requested.
  - Other units as needed
- Determine the ongoing need for personnel based on the EOC schedule.
- Coordinate-technical and subject matter experts.
- Carry out responsibilities of the Section not currently staffed.

### Notifications (See Appendix A for restricted phone and fax numbers):

Note: City should verify that information sent to the Op Area via the contact Sheriff's Station has been received. This should be done at the earliest possible time.

- EOC Activation:** Notify the Los Angeles County Operational Area (Op Area) that the City EOC is activated using the designated countywide emergency reporting system. If those systems are not available, then all requests and reports are to be sent to the contact Sheriff's Temple City Station by means coordinated with and agreed to by the Watch Commander and city staff. The Temple City Sheriff's Station will then be responsible for sending the information to the Op Area EOC.
- EOC Activation:** Notify Disaster Management Area Coordinator (DMAC) of EOC activation.
- EOC Activation:** Notify adjacent jurisdictions and other EOCs as necessary.

## PLANNING/INTELLIGENCE SECTION COORDINATOR CHECKLIST

### Local Emergency Proclamation:

- Notify the Op Area if a local emergency is proclaimed (see notification procedures above) and provide a copy to the Op Area.
- Send a copy of the proclamation to the CalEMA, Southern Region EOC (REOC) as a courtesy.
- Notify DMAC when a local emergency is proclaimed.

**EOC Deactivation:** Notify the Op Area (see notification procedures above), adjacent jurisdictions and other EOCs as necessary of planned time for deactivation.

**EOC Deactivation:** Notify DMAC of EOC deactivation.

### Meetings/Briefings:

Brief incoming or relief Section personnel prior to their beginning their duties. Briefings should include:

- Current situation assessment.
- Identification of specific job responsibilities.
- Identification of co-workers within the job function and/or geographical assignment.
- Availability of communications.
- Location of work area.
- Identification of eating and sleeping arrangements as appropriate.
- Procedural instructions for obtaining additional supplies, services and personnel.
- Work shifts.

Conduct periodic briefings for the Section. Be sure that all personnel are aware of both Section and overall priorities.

Direct the coordination of periodic disaster and strategy plans briefings to the EOC Director and General Staff, including analysis and forecast of incident potential.

Brief the EOC Director on major problem areas that need solution.

greater details on situation status based on specific field activities (less than 30 minutes and about 45 minutes after Size-Up Briefing).

**Action Planning: (EOC Action Planning process is in Planning/Intelligence Supporting Documents). Also see Planning P and Checklist on pages P-5 and 6.**

## PLANNING/INTELLIGENCE SECTION COORDINATOR CHECKLIST

Refer to the Modified EOC Planning P (EAP Process) located in the Finance/ Administration Section Supporting Documentation for additional position responsibilities.

- Initiate the EOC Action Plan development for the current and future operational periods.
- Working with the EOC Management Team and the Documentation Unit, prepare an EOC Action Plan to identify priorities and objectives for the next operational period.
- Identify Section priorities, objectives and significant problems.
- Participate in all Action Planning meetings
- Obtain approval of the EOC Action Plan from the EOC Director.
- Distribute EOC Action Plan to all Section supervisors.

### Documentation:

Note: Complete and precise information is essential to meet requirements for reimbursement by CalEMA and FEMA.

- Open and maintain an Activity Log (Form #EOC-001). This is a log to record what you do during your shift at the EOC. Document such things as:
  - Messages received.
  - Action taken.
  - Decision and policy justification and documentation.
  - Requests filled.
  - EOC assignments.
- Be sure that all Section meetings are documented.
- Information supporting Section policy decisions and their justification should be documented.
- Be sure that all units account for personnel and work assignments.
- Be sure that all the Section logs and files are maintained.
- Provide Section personnel and equipment time records to the Time Unit at the end of each shift.
- Ensure that all records relating to personnel, equipment and materials used are received from other Sections and submitted to the Time Unit at the end of each shift. (See Part Four—Forms.)

**PLANNING/INTELLIGENCE SECTION  
COORDINATOR CHECKLIST****Policies: (Personalize for City)****Ongoing Activities:**

- Assess the impact of the disaster/emergency on the city, including the initial safety/damage assessment by field units.
- Develop situation analysis information on the impact of the emergency from the following sources: **(CW-#42)**
  - City departments
  - School Districts
  - American Red Cross
  - Los Angeles County Departments
  - CHP/Caltrans
  - Media (radio/television)
  - Internet
  - Amateur Radio System
  - Other available sources
- Ensure that pertinent disaster information is collected and disseminated through appropriate channels to field response personnel, EOC personnel, City departments, the Disaster Management Area Coordinator (DMAC) and the Los Angeles County Operational Area.
- Ensure that reports are made to the Los Angeles County Operational Area via the designated county-wide emergency reporting systems. If those systems are not available, all reports and resource requests are to be sent to the contact Sheriff's Station by means coordinated with and agreed to by the Watch Commander and City staff. The Sheriff's Station will then be responsible for sending the information to the Los Angeles County Operational Area
- Determine the City's post-event condition.
- Begin planning for recovery

**Shift Change:**

- Brief incoming personnel and identify in-progress activities which need follow-up.
- Provide incoming personnel the next EOC Action Plan.
- Submit completed logs, time cards, etc. for the Section before you leave.

<p style="text-align: center;"><b>PLANNING/INTELLIGENCE SECTION COORDINATOR CHECKLIST</b></p>
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- Determine when you should return for your next work shift.
- Leave contact information where you can be reached.

**EOC Deactivation:**

- Authorize deactivation of branches or units in the Section when they are no longer required.
- Be sure that all required forms or reports are completed prior to deactivation.
- Prepare a list of outstanding issues that need to be addressed after the EOC has been deactivated.
- Deactivate the Section and close out logs when authorized by the EOC Director.
- Provide input to the After Action Report/Improvement Plan (AAR/IP).
- Post event: Oversee the development, approval and distribution of the AAR/IP.

<b>PLANNING/INTELLIGENCE SECTION SITUATION STATUS UNIT CHECKLIST</b>
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**Primary–A Shift:** Any Available Volunteer

**1<sup>st</sup> Alternate–A Shift:** Any Available Volunteer

**Primary–B Shift:** Any Available Volunteer

**1<sup>st</sup> Alternate–B Shift:** Any Available Volunteer

**Primary Responsibilities:**

- Gather, organize and disseminate disaster information in the EOC.
- Develop and maintain maps and other information displays.
- Transmit reports which the Section Coordinator has approved to the Op Area.
- Supervise Situation Status Unit.

**Checklist Actions****Start Up:**

- Check in upon arrival at the EOC.
- Determine EOC assignment.
- Print your name on the EOC organization chart.
- Obtain a briefing on the situation.
- Obtain a copy of the current EOC Action Plan (not available at initial EOC activation).
- Determine your work location and set up as necessary.
- Put on the vest with your title.**
- Review your position responsibilities.
- Begin documenting events and activities.

**Assignments/Staffing:**

- Report to the Section Coordinator.
- Clarify issues regarding your authority and assignment.



**PLANNING/INTELLIGENCE SECTION  
SITUATION STATUS UNIT CHECKLIST****Notifications (See Appendix A for restricted phone and fax numbers):**

- Make any notifications of EOC activation/deactivation, proclamations, incident status, etc. as directed by the Section Coordinator. See pages P-11 and 12.

**Meetings/Briefings:**

- Brief new or relief personnel in the Unit.
- Attend all Section meetings and briefings.

**Action Planning:**

**Refer to the Modified EOC Planning P (EAP Process) located in the Finance/ Administration Section Supporting Documentation for additional position responsibilities.**

- Assist the Section in developing Section objectives for the EOC Action Plan.

**Documentation:**

Note: Complete and precise information is essential to meet requirements for reimbursement by CalEMA and FEMA.

- Open and maintain an Activity Log (Form #EOC-001). This is a log to record what you do during your shift at the EOC. Document such things as:
- Messages received.
  - Action taken.
  - Decision and policy justification and documentation.
  - Requests filled.
  - EOC assignments.
- Coordinate the collection and documentation of costs pertaining to the disaster.
- Provide personnel and equipment time records to the Section Coordinator at the end of each work shift.

**Policies: (Personalize for City)**

**PLANNING/INTELLIGENCE SECTION  
SITUATION STATUS UNIT CHECKLIST****Ongoing Activities:**

- Collect, organize and display status of disaster events, including: (CW-#42)
  - Location and nature of the disaster incidents.
  - Number of injured persons.
  - Number of deceased persons (confirmed by the Coroner).
  - Road closures and disaster routes.
  - Health concerns.
  - Structural property damage (estimated dollar value).
  - Personal property damage (estimated dollar value).
  - City resources committed to the disaster/emergency.
  - City resources available.
  - Assistance provided by outside agencies and resources committed.
  - Number of evacuees.
  - Weather information.
  - Information on shelters.
- Gather and verify information from all available sources including:
  - Meetings and briefings.
  - EOC Action Plan.
  - Reports.
  - Field observations.
  - Forms and Status Boards.
  - Aerial reports and photographs.
  - Countywide emergency management information system.
  - Media, County PIO and other agency PIO reports.
- Prepare and maintain displays, charts and lists which reflect the current status and location of on-scene assigned resources (personnel, equipment and vehicles).
- Determine Unit logistical needs and forward to the Section Coordinator for approval.
- Request approved resources through the Logistics Section.
- Keep the Section Coordinator advised of your status and activity.

**Shift Change:**

- Brief incoming personnel and identify in-progress activities which need follow-up.
- Provide incoming personnel the next EOC Action Plan.

<b>PLANNING/INTELLIGENCE SECTION SITUATION STATUS UNIT CHECKLIST</b>
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- Submit completed logs, time cards, etc. to the Section Coordinator before you leave.
- Determine when you should return for your next work shift.
- Leave contact information where you can be reached.

**EOC Deactivation:**

- Be sure that all required forms or reports are completed prior to deactivation.
- Prepare a list of outstanding issues that need to be addressed after EOC has been deactivated.
- Provide input to the After Action Report/Improvement Plan (AAR/IP).

<b>PLANNING/INTELLIGENCE SECTION DOCUMENTATION UNIT CHECKLIST</b>
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Primary–A Shift: Any Available Volunteer

1<sup>st</sup> Alternate–A Shift: Any Available Volunteer

Primary–B Shift: Any Available Volunteer

1<sup>st</sup> Alternate–B Shift: Any Available Volunteer

**Primary Responsibilities:**

- Collect, organize and file all completed disaster documents before the end of each work shift to:
  - Support cost recovery efforts
  - Create a historical record
  - Provide information for the defense of claims against the City.
- Compile, copy and distribute plans and reports for the EOC, including the EOC Action Plans.
- Make sure the messaging system is working effectively.
- Create an accurate record of significant disaster incidents.
- Provide documentation and copying services to the EOC.
- Supervise the Documentation Unit.
- Post event responsibilities are the development and distribution of the AAR/IP.

**Checklist Actions****Start Up:**

- Check in upon arrival at the EOC.
- Determine EOC assignment.
- Print your name on the EOC organization chart.
- Obtain a briefing on the situation.
- Obtain a copy of the current EOC Action Plan (not available at initial EOC activation).
- Determine your work location and set up as necessary.
- Put on the name tag with your title.

**PLANNING/INTELLIGENCE SECTION  
DOCUMENTATION UNIT CHECKLIST**

- Review your position responsibilities.
- Begin documenting events and activities.

**Assignments/Staffing:**

- Report to the Section Coordinator.
- Clarify issues regarding your authority and assignment.

**Notifications (See Appendix A for restricted phone and fax numbers):  
(Personalize)****Meetings/Briefings:**

- Brief new or relief personnel in the Branch/Unit.
- Attend all Section meetings and briefings.

**Action Planning:**

**Refer to the Modified EOC Planning P (EAP Process) located in the Finance/ Administration Section Supporting Documentation for additional position responsibilities.**

- Assist the Section in developing Section objectives for the EOC Action Plan.

**Documentation:**

Note: Complete and precise information is essential to meet requirements for reimbursement by CalEMA and FEMA.

- Open and maintain an Activity Log **(Form #EOC-001)**. This is a log to record what you do during your shift at the EOC. Document such things as:
  - Messages received.
  - Action taken.
  - Decision and policy justification and documentation.
  - Requests filled.
  - EOC assignments.

## PLANNING/INTELLIGENCE SECTION DOCUMENTATION UNIT CHECKLIST

- Provide personnel and equipment time records to the Section Coordinator at the end of each work shift.

### Policies: (Personalize for City)

#### Ongoing Activities:

- Meet with the Section Coordinator to determine what documents should be maintained for official records.
- Activate or develop a filing system for all records. (CW-#42)
  - Collect, organize and file all records.
  - Use electronic document imaging whenever possible.
  - Ensure that all records are safely stored for grant management, recovery, future state and federal audits, historical documentation, legal purposes, etc.
- Contact other EOC sections and units and inform them of the requirement to maintain official records. Assist them as necessary in setting up a file records system.
- Coordinate documentation with the Situation Status Unit.
- Following planning meetings, assist in the preparation of any written action plans or procedures.
- Prepare reports identifying the extent of damage and financial losses.
- Ensure that the EOC Action Plans are prepared, approved, copied and distributed to EOC Sections and Units. (See Part Two—Planning/Intel Supporting Documents –EOC Action Planning.)
- Post event: Ensure the development and distribution of the AAR/IP. See Part Two—Planning/Intel Supporting Documents —AAR/IP.
- Ensure there are forms and processes to document the following:
  - Messages.
  - Resource requests.
  - General Information.
- Identify and establish a system for collecting, duplicating and distributing logs and forms throughout the EOC.
- Establish copying service and respond to copying requests.

**PLANNING/INTELLIGENCE SECTION  
DOCUMENTATION UNIT CHECKLIST**

- Establish a system for collecting for the official record all section and unit journal/logs/reports/forms at the completion of each work shift
- Ensure the collection of photographs, videos and/or sound recordings and dispatch records/recordings of disaster events.
- Determine Unit logistical needs and forward to the Section Coordinator for approval.
- Request approved resources through the Logistics Section.
- Keep the Section Coordinator advised of your status and activity.

**Note: For any significant event, it is highly recommended that the organization use some form of electronic document imaging to provide record preservation and accessibility.**

**Shift Change:**

- Brief incoming personnel and identify in-progress activities which need follow-up.
- Provide incoming personnel the next EOC Action Plan.
- Submit completed logs, time cards, etc. to the Section Coordinator before you leave.
- Determine when you should return for your next work shift.
- Leave contact information where you can be reached.

**EOC Deactivation:**

- Be sure that all required forms or reports are completed prior to deactivation.
- Prepare a list of outstanding issues that need to be addressed after EOC has been deactivated.
- Provide input to the After Action Report/Improvement Plan (AAR/IP).
- Transfer all documentation to the Recovery organization when the EOC is deactivated.
- Post-incident: Ensure the development and distribution of the AAR/IP. **(See Part Two—Planning/Intel Supporting Documents –AAR/IP.)**

<b>PLANNING/INTELLIGENCE SECTION DAMAGE ASSESSMENT UNIT CHECKLIST</b>
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Primary–A Shift: Any Available Volunteer

1<sup>st</sup> Alternate–A Shift: Any Available Volunteer

Primary–B Shift: Any Available Volunteer

1<sup>st</sup> Alternate–B Shift: Any Available Volunteer

**Primary Responsibilities:**

- Collect and maintain information on:
  - Structural safety issues for all buildings, infrastructure and public utilities.
  - Estimated costs of damages.
  - Conditions that present a potential threat to public health and safety or to improved property (property with buildings on it).

**Checklist Actions****Start Up:**

- Check in upon arrival at the EOC.
- Determine EOC assignment.
- Print your name on the EOC organization chart.
- Obtain a briefing on the situation.
- Obtain a copy of the current EOC Action Plan (not available at initial EOC activation).
- Determine your work location and set up as necessary.
- Put on the name tag with your title.
- Review your position responsibilities.
- Begin documenting events and activities.

**Assignments/Staffing:**

- Report to the Section Coordinator.



<b>PLANNING/INTELLIGENCE SECTION DAMAGE ASSESSMENT UNIT CHECKLIST</b>
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- Clarify issues regarding your authority and assignment.

**Notifications (See Appendix A for restricted phone and fax numbers):  
(Personalize)**

**Meetings/Briefings:**

- Brief new or relief personnel in the /Unit.  
 Attend all Section meetings and briefings.

**Action Planning:**

- Assist the Section in developing Section objectives for the EOC Action Plan.

**Documentation:**

Note: Complete and precise information is essential to meet requirements for reimbursement by CalEMA and FEMA.
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- Open and maintain an Activity Log (Form #EOC-001). This is a log to record what you do during your shift at the EOC. Document such things as:
- Messages received.
  - Action taken.
  - Decision and policy justification and documentation.
  - Requests filled.
  - EOC assignments.
- Provide personnel and equipment time records to the Section Coordinator at the end of each work shift.

**Policies:**

**(Personalize)**

**Ongoing Activities:**

<p style="text-align: center;"><b>PLANNING/INTELLIGENCE SECTION DAMAGE ASSESSMENT UNIT CHECKLIST</b></p>
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- Coordinate collection of safety/damage assessment information through the Building and Safety Branch of Operations Section (**see Planning/Intel Supporting Documents –Safety/Damage Assessment Forms**).
- Coordinate with all Operations branches for possible information on damage to structures.
- Prepare safety/damage assessment reports; provide to the Section Coordinator for approval and dissemination
- Prepare a report of those structures requiring immediate demolition to ensure the public safety.
- Collect, record and total the type, location and estimated value of damage.
- Coordinate with the American Red Cross, insurance companies and other sources for additional safety/damage assessment information.
- Provide final safety/damage assessment reports and supporting documents to the Documentation Unit.
- Determine Unit logistical needs and forward to the Section Coordinator for approval.
- Request approved resources through the Logistics Section.
- Keep the Section Coordinator advised of your status and activity.

**Shift Change:**

- Brief incoming personnel and identify in-progress activities which need follow-up.
- Provide incoming personnel the next EOC Action Plan.
- Submit completed logs, time cards, etc. to the Section Coordinator before you leave.
- Determine when you should return for your next work shift.
- Leave contact information where you can be reached.

**EOC Deactivation:**

- Be sure that all required forms or reports are completed prior to deactivation.
- Prepare a list of outstanding issues that need to be addressed after EOC has been deactivated.

**PLANNING/INTELLIGENCE SECTION  
DAMAGE ASSESSMENT UNIT CHECKLIST**

- Provide input to the After Action Report/Improvement Plan (AAR/IP).

<b>PLANNING/INTELLIGENCE SECTION ADVANCE PLANNING UNIT CHECKLIST</b>
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Primary–A Shift: Any Available Volunteer

1<sup>st</sup> Alternate–A Shift: Any Available Volunteer

Primary–B Shift: Any Available Volunteer

1<sup>st</sup> Alternate–B Shift: Any Available Volunteer

**Primary Responsibilities:**

- Analyze situational data, coordinating with subject matter experts (if available).
- Forecast impacts of events for potential solution for the next 24 hour plus time period.
- Prepare reports and briefings for use in planning meetings.
- Supervise the Advance Planning Unit.

**Checklist Actions****Start Up:**

- Check in upon arrival at the EOC.
- Determine EOC assignment.
- Print your name on the EOC organization chart.
- Obtain a briefing on the situation.
- Obtain a copy of the current EOC Action Plan (not available at initial EOC activation).
- Determine your work location and set up as necessary.
- Put on the nametag with your title.
- Review your position responsibilities.
- Begin documenting events and activities.

**Assignments/Staffing:**

- Report to the Section Coordinator.

<b>PLANNING/INTELLIGENCE SECTION ADVANCE PLANNING UNIT CHECKLIST</b>
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- Clarify issues regarding your authority and assignment.

**Notifications (See Appendix A for restricted phone and fax numbers):  
(Personalize)**

**Meetings/Briefings:**

- Brief new or relief personnel in the Unit.  
 Attend all Section meetings and briefings.

**Action Planning:**

- Assist the Section in developing Section objectives for the EOC Action Plan.

**Documentation:**

Note: Complete and precise information is essential to meet requirements for reimbursement by CalEMA and FEMA.
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- Open and maintain an Activity Log (Form #EOC-001). This is a log to record what you do during your shift at the EOC. Document such things as:
- Messages received.
  - Action taken.
  - Decision and policy justification and documentation.
  - Requests filled.
  - EOC assignments.
- Provide personnel and equipment time records to the Section Coordinator at the end of each work shift.

**Policies:**

**(Personalize)**

**Ongoing Activities:**

- Obtain current briefing from the Situation Status Unit.

**PLANNING/INTELLIGENCE SECTION  
ADVANCE PLANNING UNIT CHECKLIST**

- Determine best estimate of duration of the situation from available information.
- Review current priorities and policies.
- In coordination with other EOC sections, develop written forecasts for future time periods as requested. These should include any or all of the following: (CW-#42)
  - Best estimate of likely situation in 24 to 72 hours given current direction and policy.
  - Recommend top priorities for actions and resources.
  - Identify any recommended changes to EOC policy, organization or procedures to better address the possible situation.
  - Identify any issues and constraints that should be addressed now in light of the probable situation in 36-72 hours.
  - Identify issues that may increase or decrease City involvement.
- Provide reports to the Section Coordinator and/or EOC Director and others as directed.
- Determine Unit logistical needs and forward to the Section Coordinator for approval.
- Request approved resources through the Logistics Section.
- Keep the Section Coordinator advised of your status and activity.

**Shift Change:**

- Brief incoming personnel and identify in-progress activities which need follow-up.
- Provide incoming personnel the next EOC Action Plan.
- Submit completed logs, time cards, etc. to the Section Coordinator before you leave.
- Determine when you should return for your next work shift.
- Leave contact information where you can be reached.

**EOC Deactivation:**

- Be sure that all required forms or reports are completed prior to deactivation.
- Prepare a list of outstanding issues that need to be addressed after EOC has been deactivated.
- Provide input to the After-Action Report/Improvement Plan (AAR/IP).

<b>PLANNING/INTELLIGENCE SECTION INITIAL RECOVERY UNIT CHECKLIST</b>
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Primary–A Shift:                      Any Available Volunteer

1<sup>st</sup> Alternate–A Shift:                      Any Available Volunteer

Primary–B Shift:                              Any Available Volunteer

1<sup>st</sup> Alternate–B Shift:                      Any Available Volunteer

**Primary Responsibilities:**

- Collect and analyze information to determine the impact on the city from a recovery/restoration perspective.
- Make recommendations on recovery/restoration priorities.
- Gather documentation for the recovery/restoration process in coordination with the Finance/Administration Section.
- Supervise the Initial Recovery Planning Unit.

**Checklist Actions**

**Start Up:**

- Check in upon arrival at the EOC.
- Determine EOC assignment.
- Print your name on the EOC organization chart.
- Obtain a briefing on the situation.
- Obtain a copy of the current EOC Action Plan (not available at initial EOC activation).
- Determine your work location and set up as necessary.
- Put on the nametag with your title.
- Review your position responsibilities.
- Begin documenting events and activities.

**Assignments/Staffing:**

<b>PLANNING/INTELLIGENCE SECTION INITIAL RECOVERY UNIT CHECKLIST</b>
--

- Report to the Section Coordinator.
- Clarify issues regarding your authority and assignment.

**Notifications (See Appendix A for restricted phone and fax numbers):  
(Personalize)**

**Meetings/Briefings:**

- Brief new or relief personnel in the Unit.
- Attend all Section meetings and briefings.

**Action Planning:**

- Assist the Section in developing Section objectives for the EOC Action Plan.

**Documentation:**

Note: Complete and precise information is essential to meet requirements for reimbursement by CalEMA and FEMA.
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- Open and maintain an Activity Log (Form #EOC-001). This is a log to record what you do during your shift at the EOC. Document such things as:
  - Messages received.
  - Action taken.
  - Decision and policy justification and documentation.
  - Requests filled.
  - EOC assignments.
- Provide personnel and equipment time records to the Section Coordinator at the end of each work shift.

**Policies: (Personalize for City)**

**Ongoing Activities:**



<b>PLANNING/INTELLIGENCE SECTION INITIAL RECOVERY UNIT CHECKLIST</b>
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- Identify and define recovery/restoration issues for EOC Management.
- Identify potential fast-track solutions to recovery issues.
- Gather information from Planning Department on zoning and other regulations as they may affect recovery/restoration.
- Analyze data on structures or portions of the community that may require special considerations (i.e., historical buildings, environmental, cultural, etc.)
- Gather information about:
  - Debris removal issues
  - Building issues, including demolition, repairs or reconstruction
  - Utility restoration plans
  - Other critical elements, including transportation, schools, medical services, etc.
- Estimate housing issues (numbers of damaged and destroyed, temporary housing needed, etc.)
- With other governmental agencies, open Local Assistance Centers (LACs), Disaster Resource Centers (DRCs), etc.)
- Recommend to Management an organizational structure for Recovery Operations and it should be activated.
- Develop a plan to transfer the EOC Initial Recovery responsibilities to a post-EOC Recovery Organization.
- Determine Unit logistical needs and forward to the Section Coordinator for approval.
- Request approved resources through the Logistics Section.
- Keep the Section Coordinator advised of your status and activity.

**Shift Change:**

- Brief incoming personnel and identify in-progress activities which need follow-up.
- Provide incoming personnel the next EOC Action Plan.
- Submit completed logs, time cards, etc. to the Section Coordinator before you leave.
- Determine when you should return for your next work shift.
- Leave contact information where you can be reached.

<b>PLANNING/INTELLIGENCE SECTION INITIAL RECOVERY UNIT CHECKLIST</b>
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**EOC Deactivation:**

- Be sure that all required forms or reports are completed prior to deactivation.
- Prepare a list of outstanding issues that need to be addressed after EOC has been deactivated.
- Provide input to the After-Action Report/Improvement Plan (AAR/IP).

<b>PLANNING/INTELLIGENCE SECTION DEMOBILIZATION UNIT CHECKLIST</b>
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Primary–A Shift: Any Available Volunteer

1<sup>st</sup> Alternate–A Shift: Any Available Volunteer

Primary–B Shift: Any Available Volunteer

1<sup>st</sup> Alternate–B Shift: Any Available Volunteer

**Primary Responsibilities:**

- Create a Demobilization Plan.
- Make sure all personnel follow the Demobilization Plan.
- Supervise the Demobilization Unit.

**Checklist Actions**

**Start Up:**

- Check in upon arrival at the EOC.
- Determine EOC assignment.
- Print your name on the EOC organization chart.
- Obtain a briefing on the situation.
- Obtain a copy of the current EOC Action Plan (not available at initial EOC activation).
- Determine your work location and set up as necessary.
- Put on the nametag with your title.
- Review your position responsibilities.
- Begin documenting events and activities.

**Assignments/Staffing:**

- Report to the Section Coordinator.
- Clarify issues regarding your authority and assignment.

**PLANNING/INTELLIGENCE SECTION  
DEMOBILIZATION UNIT CHECKLIST****Notifications (See Appendix A for restricted phone and fax numbers):  
(Personalize)****Meetings/Briefings:**

- Brief new or relief personnel in the Unit.
- Attend all Section meetings and briefings.

**Action Planning:**

- Assist the Section in developing Section objectives for the EOC Action Plan.

**Documentation:**

Note: Complete and precise information is essential to meet requirements for reimbursement by CalEMA and FEMA.

- Open and maintain an Activity Log (Form #EOC-001). This is a log to record what you do during your shift at the EOC. Document such things as:
  - Messages received.
  - Action taken.
  - Decision and policy justification and documentation.
  - Requests filled.
  - EOC assignments.
- Provide personnel and equipment time records to the Section Coordinator at the end of each work shift.

**Policies:****(Personalize)****Ongoing Activities:**

- Coordinate with the field level Demobilization Unit Leader.
- Review the organization and current staffing to determine the likely size and extent of demobilization effort.

**PLANNING/INTELLIGENCE SECTION  
DEMOBILIZATION UNIT CHECKLIST**

- Request the Section Coordinators to assess long-term staffing needs within their sections and provide listing of positions and personnel for release by priority.
- Coordinate with the Agency Representatives to determine:
  - Agencies not requiring formal demobilization
  - Personal rest and safety needs
  - Coordination procedures with cooperating/assisting agencies
- Evaluate logistics and transportation capabilities to support the demobilization effort.
- Prepare a Demobilization Plan to include the following: (CW-#42)
  - Release plan strategies and general information
  - Priorities for release (according to agency and kind and type of resource)
  - Phase over or transfer of authorities
- Completion and submittal of all required documentation
- Obtain approval of the Demobilization Plan from the EOC Director.
- Ensure that all sections and branches/groups/units understand their specific demobilization responsibilities.
- Supervise execution of the Demobilization Plan.
- Brief Section Coordinator on demobilization progress.
- Obtain identification and description of surplus resources.
- Establish “check-in” stations, as required, to facilitate the return of supplies, equipment and other resources.
- Determine Unit logistical needs and forward to the Section Coordinator for approval.
- Request approved resources through the Logistics Section.
- Keep the Section Coordinator advised of your status and activity.

**Shift Change:**

- Brief incoming personnel and identify in-progress activities which need follow-up.
- Provide incoming personnel the next EOC Action Plan.
- Submit completed logs, time cards, etc. to the Section Coordinator before you leave.
- Determine when you should return for your next work shift.

**PLANNING/INTELLIGENCE SECTION  
DEMOBILIZATION UNIT CHECKLIST**

- Leave contact information where you can be reached.

**EOC Deactivation:**

- Be sure that all required forms or reports are completed prior to deactivation.
- Prepare a list of outstanding issues that need to be addressed after EOC has been deactivated.
- Provide input to the After-Action Report/Improvement Plan (AAR/IP).

<b>PLANNING/INTELLIGENCE SECTION TECHNICAL SPECIALIST CHECKLIST</b>
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Primary–A Shift: Any Available Volunteer

1<sup>st</sup> Alternate–A Shift: Any Available Volunteer

Primary–B Shift: Any Available Volunteer

1<sup>st</sup> Alternate–B Shift: Any Available Volunteer

**Primary Responsibilities:**

- Provide technical assistance in specialized areas to the City EOC.

**Checklist Actions****Start Up:**

- Check in upon arrival at the EOC.
- Determine EOC assignment.
- Print your name on the EOC organization chart.
- Obtain a briefing on the situation.
- Obtain a copy of the current EOC Action Plan (not available at initial EOC activation).
- Determine your work location and set up as necessary.
- Put on the nametag with your title.
- Review your position responsibilities.
- Begin documenting events and activities.

**Assignments/Staffing:**

- Report to the Section Coordinator.
- Clarify issues regarding your authority and assignment.

**Notifications (See Appendix A for restricted phone and fax numbers):**

**PLANNING/INTELLIGENCE SECTION  
TECHNICAL SPECIALIST CHECKLIST****(Personalize)****Meetings/Briefings:**

- Brief new or relief personnel in the Unit.
- Attend all Section meetings and briefings.

**Action Planning:**

- Assist the Section in developing Section objectives for the EOC Action Plan.

**Documentation:**

Note: Complete and precise information is essential to meet requirements for reimbursement by CalEMA and FEMA.

- Open and maintain an Activity Log (Form #EOC-001). This is a log to record what you do during your shift at the EOC. Document such things as:
  - Messages received.
  - Action taken.
  - Decision and policy justification and documentation.
  - Requests filled.
  - EOC assignments.
- Provide personnel and equipment time records to the Section Coordinator at the end of each work shift.

**Policies:****(Personalize)****Ongoing Activities:**

- Act as a resource to members of the EOC staff in matters relative to your technical specialty. (CW-#42)

**Shift Change:**



**PLANNING/INTELLIGENCE SECTION  
TECHNICAL SPECIALIST CHECKLIST**

- Brief incoming personnel and identify in-progress activities which need follow-up.
- Provide incoming personnel the next EOC Action Plan.
- Submit completed logs, time cards, etc. to the Section Coordinator before you leave.
- Determine when you should return for your next work shift.
- Leave contact information where you can be reached.

**EOC Deactivation:**

- Be sure that all required forms or reports are completed prior to deactivation.
- Prepare a list of outstanding issues that need to be addressed after EOC has been deactivated.
- Provide input to the After Action Report/Improvement Plan (AAR/IP).