

Create Position Task Books from EOC Skillsets – An Exercise

Purpose and Instructions

The purpose of this exercise—Creating Position Task Books (PTB) from EOC Skillsets—is twofold:

- To familiarize Emergency Operations Center (EOC) leaders with EOC Skillsets
- To give leaders practical, scenario-based experience in building position qualifications based on an organization's needs and resources

As a part of the National Qualification System (NQS), EOC Skillsets support standardized qualifications for EOC personnel while remaining flexible enough to accommodate EOCs of all sizes and kinds. Leaders can mix and match EOC Skillsets to identify the skills that best align with the roles and responsibilities of their EOC positions.

Additionally, EOC Skillsets create a national vocabulary to enable clear communication of desired capabilities in recruiting EOC personnel.

Once an organization has functionally aligned its structure with an EOC reporting structure, it can use the EOC Skillsets to build PTBs for each position.



FEMA

[State/City/Town of INSERT] Exercise: Creating Position Task Books (PTB) from EOC Skillsets

As an Emergency Operations Center (EOC) leader, you determine which skills your personnel will need to achieve the EOC's mission. FEMA has defined 17 functional skillsets, which determine what a position does, and three level of responsibility skillsets, which determine where a position falls within an EOC structure. Leaders can mix and match these 20 EOC Skillsets to create thousands of unique combinations that accommodate the diversity of EOCs across the nation. Ultimately, EOC leaders and staff decide what skills their personnel need for success. Table 1 lists the 20 skillsets. A separate handout explains each skillset.

Table 1: EOC Skillsets

Level of Responsibility	
Coordination and Individual Contribution	
Leadership	
Policy and Direction	
Function	
Action Tracking	Public Affairs Coordination
Center Management	Recovery Coordination
Document and Records Management	Resource Ordering and Acquiring
EOC Facility Management	Resource Sourcing
Finance	Resource Tracking
Legal Counseling	Safety Advising
Organizational Representation	Situational Awareness
Performance Improvement	Understanding the Resource Requirement
Planning	

About the Exercise: EOC Skillset Card Sort

This is a four-step card sort exercise designed to help participants a) identify the full set of tasks team members will need to complete to qualify for an EOC position and b) organize the tasks into a PTB.

The starting point is to identify the EOC Skillsets that apply to a given position. Each EOC Skillset (see Table 1) appears on a card, along with its **task categories**. Participants can review the individual tasks under each of these task categories separately if they need more information.

The exercise asks participants to assign EOC Skillsets to each position within the EOC, keeping these guidelines in mind:

- Use the **position description** in the organization’s personnel or incident management handbook (or similar) to guide the PTB development.
- It’s OK to assign the same skillset to multiple positions.
- It’s OK to assign multiple skillsets to a single position.
- Make positions attainable for personnel; do not assign so many skillsets that it’s difficult for people to qualify for a position.
- Select and assign skillsets in a way that makes sense for each position. There is no “right answer.”
- Complete the card sort exercise for each EOC position first as individuals (Step 1) and then as a group (Step 2).
- Note that the three levels of responsibility skillsets (Coordination and Individual Contribution, Leadership, and Policy and Direction) address tasks at a high level, while the functional skillsets address tasks in greater detail.

Step 1: Card Sort Exercise – Completed Individually

Target time: 10 minutes per EOC position

1. Assign the Coordination and Individual Contribution EOC Skillset card to **each position** in the EOC.
2. Assign the Leadership EOC Skillset card to **all supervisory positions** in the EOC.
3. Consider your EOC positions one at a time. For each position, select the EOC Skillset functional card that best matches the position description in your personnel handbook (or similar), based on the skillset’s task categories. (Don’t think about individual tasks within a skillset—only the task categories.) For example, look at the Public Information Officer (PIO) job description in your personnel or incident management handbook and see whether it matches the EOC Skillset for Public Affairs Coordination. See Figures 1 and 2.

Public Information Officer (PIO)

The PIO Advises the EOC director and the incident support system personnel on public information matters relating to the incident. The EOC PIO coordinates and maintains close communication with the PIO assigned to the ICP to coordinate messaging and information. The PIO manages inquiries from the media, the public and elected officials; emergency public information and warnings; rumor monitoring; VIP tours; and media relations. The PIO also coordinates other functions needed to obtain, verify and disseminate public information related to the incident. Information on public health, safety and protection is of particular importance for this role. The PIO is responsible for coordination with other organizational PIOs through the JIS and if necessary- and if it is not being handled at the Incident Command level- establishing or otherwise supporting the JIC.

Figure 1: Sample PIO position description

EOC Skillset: Public Affairs Coordination

Task Categories:

- Manage EOC-related efforts to provide information and warning to the public
- Advise the EOC Policy Group, leadership and personnel about public information and warning

Figure 2: Sample Public Affairs Coordination task categories

4. Assign more skillset cards to the position as appropriate, selecting those that best align with the job description.
5. Prioritize your skillset cards, especially if you have selected five or more cards for a position. Be ready to explain your rationale and to discuss what choices you found easy or difficult.

Step 2: Card Sort Exercise – Completed as a Group (5 people or more)

Target time: 20 minutes per position

1. When all participants have finished Step 1, assemble as a group. Ask participants to present their cards to the group for discussion. Use a whiteboard or spreadsheet to record which skillset cards each person selected for each position.
2. Select EOC Skillsets for each position based on the group members' simple majority opinion. Before voting, give all participants the opportunity to explain their rationale or discuss what choices they found easy or difficult.
3. For EOC Skillsets that received more than one vote but did not achieve a simple majority, discuss the skillset as a group. Give participants the opportunity to explain their rationale or discuss what they found easy or difficult about their decision.

4. Give everyone the opportunity to cast a new vote on the EOC Skillset under discussion. A simple majority of the group members determines whether the skillset is selected for inclusion in the PTB.

Step 3: EOC Individual Tasks – Completed by Project Lead

Recall that in Step 1, participants did not identify the individual tasks that EOC personnel should be able to perform. That's because EOCs vary based on the unique characteristics and dynamics of each jurisdiction/agency. In addition, FEMA's identified tasks may not fit well within each EOC. See Figure 3. Now, in Step 3, the project lead will further tailor the tasks to the EOC by identifying any tasks overlooked in the card sort process for each position.

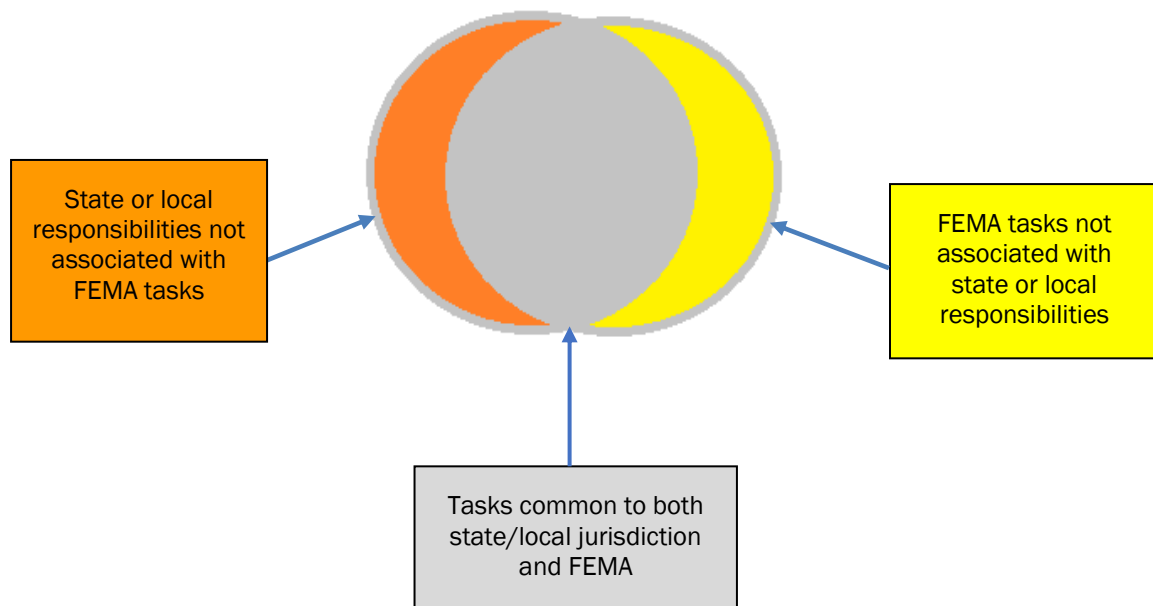


Figure 3: Arrangement of tasks within an EOC

To carry out Step 3, the project lead completes four tasks:

1. Identify the position to be reconciled—for example, Planning Section Chief (PSC).
2. Compare the position responsibilities listed in your personnel handbook, Emergency Operations Plan (EOP), or similar, to the task categories and subordinate tasks listed for each functional EOC Skillset. Record any position responsibilities that don't appear as skillset task categories or subordinate tasks as Unassigned [State/City/Town of INSERT] Responsibilities.
3. Consider skillset tasks to be the minimum, or baseline, requirements. Jurisdictions/agencies should expect their personnel to complete all baseline tasks.
4. Move to Step 4 to determine, as a group, whether and how to add the **unassigned responsibilities** to the PTB.

Step 4: Incorporating Tasks into a PTB – Group Task

The purpose of Step 4 is to review the results of Steps 1–3 and form a consensus on the composition of each PTB, based on the group's assessment of what EOC members need to know and do. The goal is to choose one of the following for each unassigned responsibility recorded in Step 3:

- Assign it to the Coordination and Individual Contribution skillset.
- Assign it to one of the other skillsets identified in Step 1 or Step 2.
- Decide not to assign it to the PTB.

As a group, complete the following tasks for each EOC position:

1. Consider each of the unassigned responsibilities recorded in Step 3. Give participants the opportunity to provide their rationale for how they would assign the responsibility.
2. Vote on each unassigned responsibility. A simple majority determines how the group assigns each task, based on the three options outlined above.
3. Review the results of Step 2 (the group card sort exercise) and take a final vote to approve incorporating these results into the PTBs.
4. For detailed information on the specific steps and process of constructing PTBs, please view the National Qualification System (NQS) EOC Skillsets and EOC Skillsets User Guide.

Note: Many organizations do not consider Multiagency Coordination Group (MAC Group)/Policy Group members part of the EOC staff. In such cases, group members should refer to the Policy and Direction skillset, not the Coordination and Individual Contribution skillset, in Step 4.