



FEMA

OREGON STATE QUALIFICATION SYSTEM EMERGENCY OPERATIONS CENTER (EOC) POSITION CHECKLIST

Position Title: _____

CONTAINS THE FOLLOWING EOC SKILLSETS:

POSITION CHECKLIST ASSIGNED TO:

TRAINEE'S NAME:

DUTY STATION:

PHONE NUMBER:

E-MAIL:

POSITION CHECKLIST INITIATED BY:

OFFICIAL'S NAME:

TITLE:

DUTY STATION:

PHONE NUMBER:

E-MAIL:

POSITION CHECKLIST WAS INITIATED:

LOCATION:

DATE:

Evaluator Verification

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

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

Documentation of Agency Certification

DOCUMENTATION OF AGENCY CERTIFICATION
I certify that _____ has successfully met all the qualification criteria as defined by _____ EOC leadership and will hereby receive certification of his/her qualification.
OFFICIAL'S SIGNATURE:
DATE:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
E-MAIL:

Emergency Operations Center (EOC) Position Checklist Overview

The EOC Position Checklist documents the performance criteria a trainee must meet to be certified for a position within the National Qualification System (NQS). The performance criteria are associated with EOC Skillsets.¹

Evaluation Process

- Evaluators observe and review a trainee's completion of EOC Position Checklist tasks, initialing and dating each successfully completed task in the EOC Position Checklist .
- Evaluators complete an Evaluation Record Form after each evaluation period by documenting the trainee's performance.
- The Authority Having Jurisdiction (AHJ) may not have enough resources to ensure that every evaluator is qualified in the position being assessed. Therefore, a trainee's supervisor may evaluate the completion of EOC Position Checklist tasks.
- The final evaluator is a leader who verifies that a trainee has completed the EOC Position Checklist. A final evaluator generally holds a leadership position over the trainee's position. When possible, the evaluator and the final evaluator should not be the same person, but in situations with limited resources, the evaluator can also serve as the final evaluator.
- Once the final evaluator has completed the Final Evaluator Verification, it can be forwarded to the Qualification Review Board (QRB) along with supporting evidence that the trainee has completed all position requirements. If there is no established QRB, then EOC Leadership should verify the qualifications.
- After the QRB or EOC leadership review, the AHJ completes the Documentation of Agency Certification form as appropriate.

¹ See the National Incident Management System (NIMS) EOC Skillsets User Guide (<https://www.fema.gov/national-qualification-system>) for more information on aligning skillsets with specific EOC positions.

Position Checklist Competencies, Behaviors, and Tasks

The EOC Position Checklist reflects the minimum criteria to qualify or recertify for a position. The AHJ has the authority to add content to the baseline EOC Position Checklist tasks, as necessary

Definitions

EOC Skillset: An EOC Skillset describes an EOC function in terms of discrete responsibilities aligned with demonstrable tasks. Skillsets can either reflect a function in an EOC (such as Planning) or a level of responsibility (such as Leadership). Skillsets combine together to form EOC Position Checklists.

Task Category: Task Categories summarize groups of similar tasks in the skillset.

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

- All tasks require evaluation; however, bulleted statements within a task are examples.

EOC Position Checklist Task Codes

Each task in the EOC Position Checklist has at least one corresponding code conveying the circumstances in which the trainee can perform the task for evaluation. Evaluators may assess trainees during incidents, in classroom simulations and training sessions, in functional and full-scale exercises, and in other work situations. If a task has multiple codes, the evaluator may evaluate in ANY of those circumstances; the trainee does not need evaluation in all of the listed circumstances.

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

Code E: Task performed during a full-scale exercise.

Code F: Task performed during a functional exercise.

Code I: Task performed during an incident or event. Examples include oil spill, search and rescue operation, hazardous materials (hazmat) response, fire, and emergency or non-emergency (planned or unplanned) events.

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

Code T: Task performed during a tabletop exercise.

Code R: Task performed very rarely and required only if applicable to the event.

How to Complete the Evaluation Record Form

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

Complete these items **AT THE START** of the evaluation period:

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

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

Evaluator’s home unit address and phone: List evaluator’s home unit address and phone number.

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

Complete these items **AT THE END** of the evaluation period:

Duration of EOC Activation: Enter approximately how long the EOC was activated / number of operational periods over the timeframe in which the trainee completed the tasks.

EOC Activities: Enter a brief description of the major EOC activities involved in the activation (such as sheltering, public safety messaging, etc.)

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

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

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

Date: List the current date.

Evaluator’s initials: Initial here to authenticate your recommendations and to allow for comparison with initials in the EOC Position Checklist .

Evaluator’s relevant qualification: List your certification relevant to the trainee position you supervised.

Evaluation Record Form # _____

TRAINEE NAME:
TRAINEE POSITION:
Evaluation Record Number:
Evaluator's name:
Incident/office title and agency:
Evaluator's home unit address and phone:
Name and location of incident or simulation/exercise:
Duration of EOC Activation:
EOC Activities:
Evaluation period:
Recommendation: The above named trainee performed the initialed and dated tasks under my supervision. I recommend the following for this trainee's further development: _____ The trainee has successfully performed all required tasks for the position. The AHJ should consider the individual for certification. _____ The trainee could not complete certain tasks or needs additional guidance. See comments below. _____ Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation. _____ The trainee is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a trainee for this position.
Additional recommendations/comments:
Date:
Evaluator's initials:
Evaluator's relevant qualification:

Evaluation Record Form # _____

TRAINEE NAME:

TRAINEE POSITION:

Evaluation Record Number:

Evaluator's name:

Incident/office title and agency:

Evaluator's home unit address and phone:

**Name and location of incident or
simulation/exercise:**

Duration of EOC Activation:

EOC Activities:

Evaluation period:

Recommendation:

The above named trainee performed the initialed and dated tasks under my supervision. I recommend the following for this trainee's further development:

_____ The trainee has successfully performed all required tasks for the position. The AHJ should consider the individual for certification.

_____ The trainee could not complete certain tasks or needs additional guidance. See comments below.

_____ Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation.

_____ The trainee is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a trainee for this position.

Additional recommendations/comments:

Date:

Evaluator's initials:

Evaluator's relevant qualification:

Evaluation Record Form # _____

TRAINEE NAME:

TRAINEE POSITION:

Evaluation Record Number:

Evaluator's name:

Incident/office title and agency:

Evaluator's home unit address and phone:

**Name and location of incident or
simulation/exercise:**

Duration of EOC Activation:

EOC Activities:

Evaluation period:

Recommendation:

The above named trainee performed the initialed and dated tasks under my supervision. I recommend the following for this trainee's further development:

_____ The trainee has successfully performed all required tasks for the position. The AHJ should consider the individual for certification.

_____ The trainee could not complete certain tasks or needs additional guidance. See comments below.

_____ Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation.

_____ The trainee is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a trainee for this position.

Additional recommendations/comments:

Date:

Evaluator's initials:

Evaluator's relevant qualification:

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

Task Categories:

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

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

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate understanding of EOC activation and operations, including how your function relates to other incident support activities: <ul style="list-style-type: none"> Demonstrate general awareness of local risks and hazards 	C, E, F, I, T		
2. Maintain positive, calm demeanor to promote a positive work environment.	E, F, I		
3. Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.	E, F, I, J,		
4. Comply with relevant health and safety requirements.	E, F, I		
5. Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.	C, E, F, I, T		
6. Participate in the EOC planning process.	E, F, I		
7. Participate in appropriate EOC meetings and briefings related to your assigned function.	E, F, I		
8. Follow general internal and external information flow processes: <ul style="list-style-type: none"> Demonstrate knowledge of information management systems, such as incident management software 	E, F, I,		
9. Manage essential elements of information and critical information requests in accordance with processes and procedures: <ul style="list-style-type: none"> Follow EOC approval authorities Properly handle Personally Identifiable Information (PII) and sensitive information Provide proper documentation for record-keeping and accountability Provide information for reports and leadership decisions 	E, F, I,		
10. Practice proper knowledge management processes and procedures: <ul style="list-style-type: none"> File structures Naming conventions Archiving processes Position logs 	E, F, I		
11. Follow processes for resource requests, prioritization, deployment, tracking, reassignment, and demobilization.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Participate in orderly transition of resources and processes from response to recovery.	E, F, I		
13. Transfer responsibilities upon completion of assignment: <ul style="list-style-type: none">• Transfer to replacement, recovery personnel, or other responsible party• If necessary, shift responsibilities to a non-disaster/day-to-day job	E, F, I		
14. Participate in EOC training and exercises.	E, F		
15. Participate in after action review and improvement planning.	E, F, I, T		

Emergency Operations Center (EOC) Skillset: Leadership

Task Categories:

Be proficient in the job, both technically and as a leader

Supervise staff to ensure understanding and accomplishment of duties and tasks

Coordinate to foster unity of effort

Task Category: Be proficient in the job, both technically and as a leader

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Exhibit principles of duty, respect, and integrity by, for example: <ul style="list-style-type: none"> • Making sound and timely decisions • Seeking and accepting responsibility for actions 	E, F, I		
2. Demonstrate understanding of EOC and Policy Group roles, responsibilities, and authorities: <ul style="list-style-type: none"> • Describe how this mission may change in a different organization, jurisdiction, or operating environment 	E, F, I, J, T		
3. Demonstrate understanding of external sources of assistance: <ul style="list-style-type: none"> • What resources could be available • When they could become available • How to acquire them • Necessary approvals 	E, F, I, J, T		
4. Communicate vertically and horizontally to facilitate and inform decision-making: <ul style="list-style-type: none"> • Communicate options, considerations, and recommendations • Keep subordinates informed 	E, F, I		
5. Help develop strategies and tasks to support the goals and objectives of incident command or the EOC.	E, F, I		
6. Obtain relevant information for operational decisions.	E, F, I		
7. Guide personnel as they identify and address gaps in critical information.	E, F, I		
8. Establish metrics and benchmarks for program performance and monitor progress through completion.	E, F, I, J		
9. Monitor and manage stakeholder expectations: <ul style="list-style-type: none"> • Communicate policy, process, and procedural changes 	E, F, I		
10. Order and organize resources to achieve objectives: <ul style="list-style-type: none"> • Understand constraints and limitations 	E, F, I, J		
11. Continuously evaluate EOC processes, procedures, and priorities: <ul style="list-style-type: none"> • Coordinate with performance improvement personnel 	E, F, I, T		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Suggest ways to improve processes and procedures, and then help implement improvements: <ul style="list-style-type: none"> • Facilitate conversations about process performance • Assess processes • Determine gaps • Take steps for improvement 	E, F, I		

Task Category: Supervise staff to ensure understanding and accomplishment of duties and tasks

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
13. Use leadership styles appropriate to the situation.	E, F, I		
14. Establish and communicate processes and procedures.	E, F, I		
15. Assign tasks and clearly communicate expectations.	E, F, I		
16. Emphasize and foster teamwork.	E, F, I		
17. Manage conflict and coordinate problem-solving: <ul style="list-style-type: none"> • Manage conflicting viewpoints • Assess alternative courses of action • Determine and communicate a way forward • Ensure follow-through and escalate to appropriate level as necessary 	E, F, I		
18. Prepare and discuss feedback with subordinates: <ul style="list-style-type: none"> • Monitor performance and discuss task understanding • Evaluate performance and complete personnel performance evaluations 	E, F, I		
19. Support the health, safety, and welfare of assigned personnel: <ul style="list-style-type: none"> • Direct operations based on health and safety considerations and guidelines • Ensure that personnel follow safety guidelines appropriately • Spot-check operations to ensure compliance with safety guidelines • Make resources available to support staff health and safety • Monitor staff for mental and physical fatigue 	E, F, I		

Task Category: Coordinate to foster unity of effort

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
20. Establish and maintain positive interpersonal and interorganizational working relationships.	E, F, I, J		
21. Demonstrate ability to influence others outside your chain of command.	E, F, I, J		
22. Ensure staff activities align with the EOC's operational rhythm.	E, F, I		

Emergency Operations Center (EOC) Skillset: Center Management

Task Categories:

Establish EOC support for incident/event

Coordinate EOC activities

Ensure proper support for resource needs and requests, including allocation and tracking

Ensure development and coordination of plans

Ensure collection, analysis, and sharing of information internally and externally

Task Category: Establish EOC support for incident/event

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Open/activate EOC and initiate EOC personnel notification: <ul style="list-style-type: none"> Initiate EOC alert and activation procedures Determine activation level and necessary staffing based on initial information gathering and established guidelines/plans Coordinate with EOC facility management to ensure the EOC infrastructure is operational and determine personnel support needs 	E, F, I		
2. Establish and maintain communications with incident command, local EOC, and other function-specific operations, such as public health, to clarify roles and responsibilities and discuss support requirements: <ul style="list-style-type: none"> Discuss incident support requirements to clarify scope of incident command responsibilities versus EOC responsibilities Obtain initial situation information 	E, F, I		
3. Identify and prioritize positions based on the nature of the incident/activation and available resources: <ul style="list-style-type: none"> Consider: <ul style="list-style-type: none"> Consequence management beyond immediate response impacts EOC's role in relation to the incident, such as operational, coordination, or support Establish process for resource requests for operational planning purposes 	E, F, I		
4. Evaluate the need for collaboration with outside organizations to meet incident needs: <ul style="list-style-type: none"> Engage partner organizations 	E, F, I, T		
5. Ensure EOC facility management and safety personnel establish processes and procedures to promote the health, safety, and welfare of EOC personnel	E, F, I		

Task Category: Coordinate EOC activities

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
6. Direct and coordinate EOC personnel: <ul style="list-style-type: none"> • Ensure staff accountability for decisions and actions within their functional area. • Ensure staff accountability for interactions and coordination with other functional areas. • Ensure that EOC leaders consistently and effectively work together to manage incident support. 	E, F, I		
7. Ensure that EOC objectives and/or strategies for the operational period are reasonable, accurate, and consistent with incident objectives	E, F, I		
8. Supervise and adjust EOC organization and operations as necessary, based on changes in incident situation and resource status: <ul style="list-style-type: none"> • Communicate priorities and strategies throughout the EOC • Establish and maintain health and safety procedures throughout the EOC • Use and coordinate all assigned resources effectively • De-conflict procedures and objectives of organizational elements • Establish operational rhythm and daily briefing/debriefing schedule with EOC leaders 	E, F, I		
9. Ensure staff actions are appropriate based on analyzed and validated information: <ul style="list-style-type: none"> • Make adjustments in response to new information, changing conditions, or unexpected obstacles • Identify and resolve problems that could affect the outcome of the incident: <ul style="list-style-type: none"> ○ Public messaging ○ Political issues ○ Conflicting objectives 	E, F, I		
10. Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities	E, F, I		
11. Ensure that operations consider socioeconomic, political, and cultural aspects	E, F, I		
12. Ensure EOC actions support recovery efforts: <ul style="list-style-type: none"> • Ensure staff identify and execute initial recovery tasks • Plan for and make necessary EOC decisions concerning recovery • Ensure transition of recovery tasks 	E, F, I		
13. Ensure financial management for jurisdictional activities: <ul style="list-style-type: none"> • Consider reimbursement-related record keeping requirements • Advise executives on financial matters related with jurisdictional activities, as necessary 	E, F, I		
14. Ensure availability of legal advice relating to EOC activities.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
15. Support process improvement activities: <ul style="list-style-type: none"> • Ensure personnel collect and analyze information regarding EOC activation and activities • Enable staff to suggest process improvements and solutions during EOC operations • Support process/performance improvement following EOC deactivation 	E, F, I		
16. Ensure personnel complete incident documentation and appropriate administrative requirements, such as: <ul style="list-style-type: none"> • Incident forms, including activity logs per operational period • EOC action plan, in preparation for next operational period 	E, F, I		
17. Ensure resource and financial paperwork meets reimbursement criteria: <ul style="list-style-type: none"> • Personnel equipment and time records • Other reimbursement requirements 	E, F, I		
18. Ensure personnel appropriately handle classified or restricted information, such as: <ul style="list-style-type: none"> • Personally Identifiable Information (PII) • Health Insurance Portability and Accountability Act (HIPAA) • For Official Use Only (FOUO) 	E, F, I, J		
19. Plan for deactivation and ensure that staff follow deactivation procedures	E, F, I		

Task Category: Ensure proper support for resource needs and requests, including allocation and tracking

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
20. Forecast resource needs based on analysis of incident potential: <ul style="list-style-type: none"> • Understand relevant external resource sources, such as Federal, state, mutual aid, and contracting 	E, F, I, T		
21. Ensure the proper receipt and assignment of resource requests: <ul style="list-style-type: none"> • Demonstrate familiarity with process for requesting or mobilizing resources through EMAC and/or other mutual aid systems • Demonstrate familiarity with process for requesting resources from state or Federal governments • Demonstrate familiarity with process for requesting resources from the private sector and not-for-profit organizations 	E, F, I		
22. Operate, develop, or maintain a resource ordering and tracking system: <ul style="list-style-type: none"> • Establish or verify a process for tracking resource requests made to or by the EOC 	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
23. Ensure personnel properly manage requests for assistance: <ul style="list-style-type: none"> • Prioritize requests • Prioritize resources to fulfill requests • Coordinate with other responding organizations, such as neighboring jurisdictions • Properly assign tasks to the appropriate staff or representing agency • Consider logistical and financial constraints 	E, F, I		

Task Category: Ensure development and coordination of plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
24. Develop clear and concise EOC objectives and/or strategies commensurate with available resource and incident objectives: <ul style="list-style-type: none"> • Ensure they are measurable and attainable • Ensure they meet Policy Group's direction • Monitor incident status and priorities and develop alternate strategies when necessary 	E, F, I		
25. Ensure development of an EOC action plan, considering the following: <ul style="list-style-type: none"> • Size and complexity of incident • Incident agency/organization policies and procedures • Time frames and schedules • Job performance expectations • Supported agency expectations and needs 	E, F, I		
26. Ensure preparation of EOC action plan for the next operational period: <ul style="list-style-type: none"> • Determine objectives for next operational period • Review and approve tasks and work assignments for next operational period • Advise on current capabilities and limitations • Determine resource needs or excess • Approve EOC action plan 	E, F, I		
27. Ensure development of appropriate contingency plans and future plans (more than one operational period in the future).	E, F, I		
28. Monitor implementation of plans.	E, F, I		

Task Category: Ensure collection, analysis, and sharing of information internally and externally

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
29. Establish and continuously validate critical information requirements: <ul style="list-style-type: none"> Establish essential elements of information and how they will be shared, including key resource status 	E, F, I		
30. Ensure personnel initiate, regularly produce, and disseminate situation reports: <ul style="list-style-type: none"> Recognize when to initiate a situation report and what to include in the report Approve situation report before dissemination Ensure staff distribute situation reports to appropriate recipients 	E, F, I		
31. Ensure staff gather and analyze information on current and changing situations to determine action: <ul style="list-style-type: none"> Ensure close coordination with on-scene personnel 	E, F, I		
32. Communicate with Federal, state, tribal, or local agencies, such as emergency management or Homeland Security: <ul style="list-style-type: none"> Share status of key resources 	E, F, I		
33. Provide appropriate information to elected officials and senior leaders: <ul style="list-style-type: none"> Identify reporting requirements from senior officials and Policy Group Ensure the development of briefing materials for executives Advise Policy Group on: <ul style="list-style-type: none"> Creating or amending policies Enacting emergency protective measures Allocating scarce resources Strategic-level guidance Policy-level outreach actions 	E, F, I		
34. Transmit Policy Group and leadership direction within the EOC organization.	E, F, I		
35. Work with Public Affairs to determine appropriate public outreach methods for the incident: <ul style="list-style-type: none"> Consider: <ul style="list-style-type: none"> Partnering with a call center Using social media, media interviews, press releases, and public meetings Present a knowledgeable and credible image to the public and the media 	E, F, I		
36. Ensure public information coordination with other incident public information personnel: <ul style="list-style-type: none"> Evaluate the need to establish a Joint Information System (JIS) and Joint Information Center (JIC) 	E, F, I		
37. Ensure there is a method to disseminate public information and warning.	E, F, I, J		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
38. Review and approve information releases: <ul style="list-style-type: none">• Follow established information protocol for information releases• Ensure that releases are timely and accurate• Develop public messages with the Public Information Officer (PIO) or public affairs function, as necessary	E, F, I		
39. Ensure information is communicated horizontally within the EOC: <ul style="list-style-type: none">• Ensure EOC functions coordinate and share relevant information• Ensure leaders share information with their teams and across teams	E, F, I		