



FEMA

OREGON STATE QUALIFICATION SYSTEM

EMERGENCY OPERATIONS CENTER (EOC)

POSITION CHECKLIST

Position Title: _____

CONTAINS THE FOLLOWING EOC SKILLSETS:
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POSITION CHECKLIST ASSIGNED TO:
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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:
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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: 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: Demonstrate knowledge of information management systems, such as incident management software	E, F, I,		
9. Manage essential elements of information and critical information requests in accordance with processes and procedures: - Follow EOC approval authorities - Properly handle Personally Identifiable Information (PII) and sensitive information - Provide proper documentation for record-keeping and accountability - Provide information for reports and leadership decisions	E, F, I,		
10. Practice proper knowledge management processes and procedures: - File structures - Naming conventions - Archiving processes - Position logs	E, F, I		
11. Follow processes for resource requests, prioritization, deployment, tracking, reassignment, and demobilization.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Participate in orderly transition of resources and processes from response to recovery.	E, F, I		
13. Transfer responsibilities upon completion of assignment: • Transfer to replacement, recovery personnel, or other responsible party • If necessary, shift responsibilities to a non-disaster/day-to-day job	E, F, I		
14. Participate in EOC training and exercises.	E, F		
15. Participate in after action review and improvement planning.	E, F, I, T		

Emergency Operations Center (EOC) Skillset: 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: • 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: • 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: • 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: • 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: • Communicate policy, process, and procedural changes	E, F, I		
10. Order and organize resources to achieve objectives: • Understand constraints and limitations	E, F, I, J		
11. Continuously evaluate EOC processes, procedures, and priorities: • 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: • 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: • 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: • 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: • 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: Finance

Task Categories:

Administer financial management for jurisdictional expenditures

Advise EOC leadership and staff on financial matters associated with jurisdictional activities

Task Category: Administer financial management for jurisdictional expenditures

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of jurisdictional/organizational procurement policies: • Standard operations • Emergency operations • Cost-tracking processes and requirements: ○ Preapproved vendors ○ On-call contracts	E, F, I, J		
2. Demonstrate awareness of fiscal implications and requirements when: • Requesting or activating resources • Operating under various types of emergency or disaster declarations • Receiving external, Federal, or state assistance • Using volunteer resources	E, F, I, J, T		
3. Ensure policies and procedures are in place to comply with applicable reimbursement requirements.	E, F, I, J		
4. Seek information on the financial requirements of incoming resources, such as: • National Guard assets • Mutual aid resources	E, F, I		
5. Demonstrate knowledge of jurisdictional fiscal management, operations, processes, procedures, thresholds, and constraints.	E, F, I, J		
6. Establish and communicate protocol to track and maintain incident-related financial documentation, such as invoices, payroll logs, and contracts.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
7. Collect, track, and document data related to funding and expenses: • Monitor compensation processes for time and pay • Coordinate with risk management on costs involved in workers' compensation claims, damage claims, tort claims, and other incident-related claims • Implement plan to coordinate and manage monetary donations • Coordinate, collect, and track volunteer time and maintain documentation for potential reimbursement requests • Identify and follow any use limitations for various funding sources • Maintain awareness of FEMA financial guidance, including standard equipment rates, labor categories, preexisting contracts, indirect costs, fringe benefits, and established vendor lists • Identify and organize data relevant to grant or reimbursement applications	E, F, I, J		
8. Coordinate with organizational representatives to identify additional discipline-specific funding sources.	E, F, I, J		
9. Monitor and verify costs and expenditures by reviewing requests, invoices, time cards, activity logs, and other available documentation or resources: • Track jurisdictional burn rate	E, F, I		

Task Category: Advise EOC leadership and staff on financial matters associated with jurisdictional activities

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
10. Review resource requests with resource management personnel to verify understanding of request and provide input on course of action: • Suggest cost-efficient alternatives to obtaining requested resources, as appropriate	E, F, I		
11. Coordinate with resource management personnel, legal personnel, and EOC leadership to execute contracts, Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), and purchases.	E, F, I		
12. Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.	E, F, I		
13. Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.	E, F, I		