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**NEW MEXICO RESOURCE QUALIFICATION SYSTEM (NMRQS)**

**EMERGENCY OPERATIONS CENTER (EOC) POSITION TASK BOOK**

EOC Director

**CONTAINS THE FOLLOWING EOC SKILLSETS:**

\_\_\_ Situational Awareness

\_\_\_ Center Management

\_\_\_ Policy and Direction

|  |
| --- |
| **POSITION TASK BOOK ASSIGNED TO:** |
| TRAINEE’S NAME: |
| DUTY STATION: |
| PHONE NUMBER: |
| E-MAIL: |

|  |
| --- |
| **POSITION TASK BOOK INITIATED BY:** |
| OFFICIAL’S NAME: |
| TITLE: |
| DUTY STATION: |
| PHONE NUMBER: |
| E-MAIL: |

|  |
| --- |
| **POSITION TASK BOOK 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 requirements for qualification in this position and is certified for the position. |
| OFFICIAL’S SIGNATURE: |
| DATE: |
| OFFICIAL’S NAME: |
| TITLE: |
| DUTY STATION: |
| PHONE NUMBER: |
| E-MAIL: |

**Position Task Book Overview**

### A person who has been assigned to work in an EOC, who may be activated to work in an EOC in an Emergency Support Function, or who may be deployed through EMAC/IERSP to work in the EOC of another jurisdiction or as a NIMS Typed Resource will be assigned a Position Task Book (PTB) for any position they are expected to fulfill.

### Trainees are evaluated during this process by qualified evaluators, and the trainee’s performance is documented in the PTB for each task by the evaluator’s initials and date of completion.

### Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation to the NMRQS Qualification Review and Governance Committee (QRGC), that the trainee be certified in that position. Evaluation and confirmation of the trainee’s performance while completing all tasks will normally require more than one training assignment and several different evaluators. Incidents lasting several days may involve multiple evaluators. Tasks may be evaluated on incidents, simulation/tabletop exercise, planned events, in training and HSEEP compliant functional or full-scale exercises and in other work situations as long as there is a qualified evaluator.

### It is important performances be critically evaluated and accurately recorded by each evaluator. All tasks must be evaluated.

### Evaluation Process

## PTB Assignment

The State NIMS Coordinator or designee will assign PTBs. If the PTB is not completed within three (3) years from the date of the PTB initiation or the first task being evaluated (whichever is more recent), the PTB expires. A new PTB may be initiated.

### Coach/Evaluator

When a PTB is assigned, a coach will be assigned to the staff person. The State NIMS Coordinator or designee is responsible for assigning the coach. The coach must be someone who has already completed the PTB that is being assigned. The coach will provide training and mentorship and when applicable, evaluate the individual for successful completion of PTB tasks.

### Final Evaluator

Upon completion of all pre-requisites and the PTB (or PTBs) The trainee’s immediate supervisor for the duties they are currently assigned to will complete the Final Evaluator Checklist.

## Submission

Once the final evaluator has completed the Final Evaluator Verification, it is forwarded to the NMRQS QRGC along with any certificates or licenses required as a pre-requisite and the completed PTB. The QRGC upon review and approval will certify the person as qualified in the assigned task and issue credentials accordingly.

# Position Task Book Competencies, Behaviors, and Tasks

**The EOC PTB reflects the minimum criteria to qualify or recertify for a position. The AHJ has the authority to add content to the baseline EOC PTB 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 PTBs.

**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 PTB Task Codes

Each task in the EOC PTB 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, planned events, classroom simulations, or daily duties, depending on what the PTB requires for the specific task. If evaluators need additional evaluation periods, they can copy pages from a blank PTB and attach them to the PTB 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 PTB tasks. The evaluator should also write this number in the PTB column labeled “Evaluation Record #” for each task performed satisfactorily. This number enables reviewers of the completed PTB to ascertain the evaluators’ qualifications before signing off on the PTB.

***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 PTB.

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

The Emergency Operations Center Director (EOCD):

1. Delegates tasks to and supervises Command and General Staff
2. Approves all plans and operations as outlined in the Incident Action Plan
3. Coordinates operations and resource allocation between incidents and jurisdictions
4. Indirectly supervises all other incident personnel through subordinance ICS management positions
5. Receives subject matter expertise advisement from the command staff
6. Coordinates information and requests through the Multiagency Coordination (MAC) Group
7. Ensures appropriate information management tactics and distribution
8. Coordinate MAC Group priorities through jurisdictions

**Emergency Operations Center (EOC) Skillset: Situational Awareness**

Task Categorie**s:**

* Gather data and information
* Analyze data and information
* Disseminate information

***Task Category:* Gather data and information**

| **TASKS** | **CODE** | **EVALUATION RECORD #** | **EVALUATOR INITIALS AND DATE** |
| --- | --- | --- | --- |
| * + 1. Collect and monitor data and information:        - Sources include Incident Action Plan (IAP), on-scene incident reports, EOC personnel, National Weather Service, jurisdictional liaisons, fusion centers, traditional media, social media, and others        - Content includes demographic, damage assessment, infrastructure, supply chain, and geographic data and information | E, F, I, J |  |  |
| * + 1. Coordinate information with EOC public affairs personnel and the Joint Information Center (JIC)/Joint Information System (JIS):        - Receive information from JIC/JIS        - Provide information to JIC/JIS | E, F, I |  |  |
| * + 1. Coordinate with EOC personnel to gather information. | E, F, I |  |  |

***Task Category:* Analyze data and information**

| **TASKS** | **CODE** | **EVALUATION RECORD #** | **EVALUATOR INITIALS AND DATE** |
| --- | --- | --- | --- |
| * + 1. Establish and implement processes for estimating cascading effects of action or inaction:        - Evaluate potential consequences and mitigation actions        - Identify trends        - Engage technical specialists | E, F, I |  |  |
| * + 1. Use demographic information to inform analysis:        - Cultural diversity        - Potential vulnerabilities        - Damage assessment        - Specific service needs, such as:        - Individuals with disabilities and other access and functional needs        - Individuals with critical transportation needs | E, F, I |  |  |
| * + 1. Analyze information: * Establish and implement procedures for verifying, organizing, prioritizing, and tracking information * Convert raw data into information * Identify and address misinformation * Verify and analyze input for critical information * Clarify incomplete information * Identify incident-specific essential elements of information and critical information requests | E, F, I |  |  |
| * + 1. Recognize incident-specific critical information to be disseminated immediately. | E, F, I |  |  |
| * + 1. Prepare situational briefings, reports, displays, briefing tools, and other information products. | E, F, I |  |  |

***Task Category:* Disseminate information**

| **TASKS** | **CODE** | **EVALUATION RECORD #** | **EVALUATOR INITIALS AND DATE** |
| --- | --- | --- | --- |
| * + 1. Establish and implement a process for developing and disseminating situational information at regular intervals:        - Obtain approval for distribution in accordance with policies and procedures        - Determine distribution lists        - Determine methods for distribution | E, F, I |  |  |
| * + 1. Follow processes for identifying, verifying, and disseminating critical information: * Coordinate with public affairs to disseminate information externally | E, F, I |  |  |
| * + 1. Display within the EOC situational information and data about significant events. | E, F, I |  |  |
| * + 1. Use visualizations such as graphs, photographs, and maps to graphically depict information. | E, F, I |  |  |
| * + 1. Use mapping/geospatial data and sources, including Geographic Information Systems, web-based maps, and paper maps. | E, F, I |  |  |
| * + 1. Present and distribute situational briefings, reports, displays, briefing tools, and other information products. | E, F, I |  |  |
| * + 1. Ensure proper security when sharing sensitive, classified, or protected information. | E, F, I |  |  |

**Emergency Operations Center (EOC) Skillset: Center Management**

Task Categorie**s:**

* 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:        - 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 |  |  |
| * + 1. 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:        - Discuss incident support requirements to clarify scope of incident command responsibilities versus EOC responsibilities        - Obtain initial situation information | E, F, I |  |  |
| * + 1. Identify and prioritize positions based on the nature of the incident/activation and available resources:        - Consider:        - 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 |  |  |
| * + 1. Evaluate the need for collaboration with outside organizations to meet incident needs: * Engage partner organizations | E, F, I, T |  |  |
| * + 1. 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** |
| --- | --- | --- | --- |
| * + 1. Direct and coordinate EOC personnel:        - 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 |  |  |
| * + 1. Ensure that EOC objectives and/or strategies for the operational period are reasonable, accurate, and consistent with incident objectives | E, F, I |  |  |
| * + 1. Supervise and adjust EOC organization and operations as necessary, based on changes in incident situation and resource status:        - 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 |  |  |
| * + 1. Ensure staff actions are appropriate based on analyzed and validated information:        - Make adjustments in response to new information, changing conditions, or unexpected obstacles        - Identify and resolve problems that could affect the outcome of the incident: * Public messaging * Political issues * Conflicting objectives | E, F, I |  |  |
| * + 1. Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities | E, F, I |  |  |
| * + 1. Ensure that operations consider socioeconomic, political, and cultural aspects | E, F, I |  |  |
| * + 1. Ensure EOC actions support recovery efforts:        - 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 |  |  |
| * + 1. Ensure financial management for jurisdictional activities:        - Consider reimbursement-related record keeping requirements        - Advise executives on financial matters related with jurisdictional activities, as necessary | E, F, I |  |  |
| * + 1. Ensure availability of legal advice relating to EOC activities. | E, F, I, T |  |  |
| * + 1. Support process improvement activities:        - 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 |  |  |
| * + 1. Ensure personnel complete incident documentation and appropriate administrative requirements, such as:        - Incident forms, including activity logs per operational period        - EOC action plan, in preparation for next operational period | E, F, I |  |  |
| * + 1. Ensure resource and financial paperwork meets reimbursement criteria:        - Personnel equipment and time records        - Other reimbursement requirements | E, F, I |  |  |
| * + 1. Ensure personnel appropriately handle classified or restricted information, such as:        - Personally Identifiable Information (PII)        - Health Insurance Portability and Accountability Act (HIPAA)        - For Official Use Only (FOUO) | E, F, I, J |  |  |
| * + 1. 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** |
| --- | --- | --- | --- |
| * + 1. Forecast resource needs based on analysis of incident potential:        - Understand relevant external resource sources, such as Federal, state, mutual aid, and contracting | E, F, I, T |  |  |
| * + 1. Ensure the proper receipt and assignment of resource requests:        - 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 |  |  |
| * + 1. Operate, develop, or maintain a resource ordering and tracking system:        - Establish or verify a process for tracking resource requests made to or by the EOC | E, F, I |  |  |
| * + 1. Ensure personnel properly manage requests for assistance:        - 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**

| **TASKS** | **CODE** | **EVALUATION RECORD #** | **EVALUATOR INITIALS AND DATE** |
| --- | --- | --- | --- |
| * + 1. Develop clear and concise EOC objectives and/or strategies commensurate with available resource and incident objectives:        - 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 |  |  |
| * + 1. Ensure development of an EOC action plan, considering the following:        - 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 |  |  |
| * + 1. Ensure preparation of EOC action plan for the next operational period:        - 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 |  |  |
| * + 1. Ensure development of appropriate contingency plans and future plans (more than one operational period in the future). | E, F, I |  |  |
| * + 1. Monitor implementation of plans. | E, F, I |  |  |

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

| **TASKS** | **CODE** | **EVALUATION RECORD #** | **EVALUATOR INITIALS AND DATE** |
| --- | --- | --- | --- |
| * + 1. Establish and continuously validate critical information requirements:        - Establish essential elements of information and how they will be shared, including key resource status | E, F, I |  |  |
| * + 1. Ensure personnel initiate, regularly produce, and disseminate situation reports:        - 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 |  |  |
| * + 1. Ensure staff gather and analyze information on current and changing situations to determine action:        - Ensure close coordination with on-scene personnel | E, F, I |  |  |
| * + 1. Communicate with Federal, state, tribal, or local agencies, such as emergency management or Homeland Security: * Share status of key resources | E, F, I |  |  |
| * + 1. Provide appropriate information to elected officials and senior leaders:        - Identify reporting requirements from senior officials and MAC Group        - Ensure the development of briefing materials for executives        - Advise MAC Group on: * Creating or amending policies * Enacting emergency protective measures * Allocating scarce resources * Strategic-level guidance * Policy-level outreach actions | E, F, I |  |  |
| * + 1. Transmit MAC Group and leadership direction within the EOC organization. | E, F, I |  |  |
| * + 1. Work with Public Information and Warning to determine appropriate public outreach methods for the incident:        - Consider: * 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 |  |  |
| * + 1. Ensure public information coordination with other incident public information personnel: * Evaluate the need to establish a Joint Information System (JIS) and Joint Information Center (JIC) | E, F, I |  |  |
| * + 1. Ensure a there is a method to disseminate public information and warning. | E, F, I, J |  |  |
| * + 1. Review and approve information releases:        - 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 |  |  |
| * + 1. Ensure information is communicated horizontally within the EOC:        - Ensure EOC functions coordinate and share relevant information        - Ensure leaders share information with their teams and across teams | E, F, I |  |  |

**Emergency Operations Center (EOC) Skillset: Policy and Direction**

Task Categorie**s:**

* Demonstrate an understanding of the authorities, policies, priorities, capabilities, constraints, and limitations of the organization/jurisdiction you represent
* Demonstrate an understanding of coordinated response/Unified Command and the roles and responsibilities of the parties involved

***Task Category:* Demonstrate an understanding of the authorities, policies, priorities, capabilities, constraints, and limitations of the organization/jurisdiction you represent**

| **TASKS** | **CODE** | **EVALUATION RECORD #** | **EVALUATOR INITIALS AND DATE** |
| --- | --- | --- | --- |
| * + 1. Provide guidance on strategic priorities and resource support to incident personnel and stakeholders. | E, F, I |  |  |
| * + 1. Demonstrate knowledge of your organization’s financial and legal regulations and general authorities. | E, F, I,  J,T |  |  |
| * + 1. Demonstrate knowledge of the whole-community concept and of the impacted community’s cultural sensitivities. | E, F, I,  J,T |  |  |
| * + 1. Demonstrate awareness of your organization’s operational and resource capabilities. | E, F, I,  J,T |  |  |
| * + 1. Request and participate in relevant meetings and briefings. | E,F,I |  |  |
| * + 1. Work with legal counsel and EOC leadership to ensure informed decision-making. | E,F,I |  |  |
| * + 1. Authorize protective measures for life and safety, such as curfew and evacuation recommendations, based on legal authorities. | E,F,I |  |  |
| * + 1. Provide guidance and authorization for informationsharing with external agencies and the public. | E,F,I |  |  |
| * + 1. Interact with external government contacts, including those at the local, state, tribal, territorial, and/or Federal levels. | E,F,I |  |  |
| * + 1. Review and approve plans and procedures. | E,F,I |  |  |
| * + 1. Support the after action review and improvement planning process. | E,F,I |  |  |
| * + 1. Authorize external resource requests according to organizational authorities:   • Memorandums of Understanding (MOU)  • Memorandums of Agreement (MOA)  • Mutual aid agreements  • Declarations | E,F,I |  |  |
| * + 1. Understand the roles and relationships of the Policy Group, EOC, and other incident personnel. | E,F,I,  T |  |  |
| * + 1. Demonstrate awareness of the impacted community, including, for example:   • Rules and regulations  • Culture  • Demographics | E,F,I,  J,T |  |  |
| * + 1. Participate in organizational training and exercises. | E,F,I,  T |  |  |
| * + 1. Help establish and communicate policy decisions. | E,F,I |  |  |
| * + 1. Monitor objectives, strategies, and tactics for the current operational period. | E,F,I |  |  |

**Training Requirements / Pre-requisites**

1. Completion of Operations, Planning, or Logistics Section Chief EOC PTB

|  |
| --- |
| **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:** |

|  |
| --- |
| **TRAINEE NAME:** |
| **TRAINEE POSITION:** |
| **Evaluation Record Number:** |
| **Evaluator’s name:** |
| **Incident/office title and agency:** |
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| **Additional recommendations/comments:** |
| **Date:** |
| **Evaluator’s initials:** |
| **Evaluator’s relevant qualification:** |

|  |
| --- |
| **TRAINEE NAME:** |
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| **Additional recommendations/comments:** |
| **Date:** |
| **Evaluator’s initials:** |
| **Evaluator’s relevant qualification:** |