RELATED TERMS

- Pre-Plan
- Target Folder
- Template
- Target Hazard Site

Lessons Learned Information Sharing
www.LLIS.gov

BEST PRACTICE

PRIMARY DISCIPLINES

- Fire
- HazMat
- Law Enforcement
- Emergency Management

Pre-Incident Site Planning: Initiating and Conducting a Pre-Plan Site Visit

PURPOSE

Review the procedures for conducting a pre-plan/target folder site visit.

SUMMARY

After generating the requirements for the pre-plan, a team of pre-plan developers should initiate contact with personnel from the target hazard site and request initial information. The team should then conduct a formal walkthrough of the site, collecting site data as identified in the pre-plan requirements.

DESCRIPTION

Establishing Initial Contact with the Target Hazard Site

The pre-plan developers should contact the site manager in advance of the visit and request that the building engineer be present and that maps, blueprints, or other graphical information are on hand as well as guides to mechanical system activation and de-activation.

> Some jurisdictions provide survey sheets to sites prior to the pre-plan team's visit. These survey sheets allow site personnel to gather initial information, such as building construction materials and contact phone numbers, before the pre-plan team arrives.

Conducting an On-Site Walkthrough

After establishing initial contact, the pre-plan team should schedule an appointment for a formal walkthrough of the site. The National Fire Protection Association (NFPA) suggests that response planners include on-site and other non-responders personnel, such as:

> A walkthrough of a target hazard site can take up to 6 hours to complete. Larger, more complex sites may require more time.

- Building engineers
- Contractors
- Architects
- Maintenance workers
- Insurance professionals

During the walkthrough, members of the pre-plan team should collect and document all the relevant information needed for their pre-plan. If planners need to photograph or draw diagrams of the site, they should do so during the walkthrough.

The process for the pre-plan walkthrough will depend on the comprehensiveness of the desired pre-plan.

- **For tactical, "quick action" pre-plans,** the walkthrough should focus on the overall layout of the site and any immediate on-site hazards

- **For comprehensive, strategic pre-plans**, the walkthrough should explore more thoroughly the site's layout, structure, hazards, and surrounding environment

Formatting the Pre-Plan

After collecting the pre-plan information, it must be converted into finalized pre-plan format. As part of the formatting process, pre-plan developers should:

- Collate and convert written notes into a final pre-plan format, be it electronic or paper based.
- Integrate supplementary pictorial and graphic information into the final pre-plan format.

IMPLEMENTATION CHALLENGES

- **Unintended Consequences:**
  - Site personnel may be hesitant to cooperate with pre-planners if the site walkthrough is perceived to be an inspection—pre-planners should stress that the walkthrough is not an inspection
  - Certain government, corporate, or religious institutions may not want pre-planners to conduct any sort of site walkthrough
  - While gathering information on relevant hazards, pre-planners may be exposed unintentionally to hazardous materials or locations
- **Resources:**
  - Pre-planners will need the following resources:
    - Digital camera
    - Tripod (for taking panoramic photos)
    - Scanner (to scan in any documents provided by the site)
    - Photo editing software
    - Drawing software (to generate floor layouts, etc.)
- **Sustainment Needs:**
  - Since pre-planning information may change quickly, pre-planners should consider updating their pre-plans on an annual basis. If updating all pre-plans annually is unfeasible, pre-planners should prioritize updates for primary target hazard sites and for sites that have undergone substantial changes or renovations